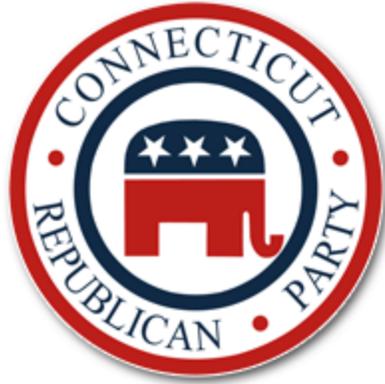


# CONNECTICUT REPUBLICANS



## THE ROLE OF THE TOWN CHAIRMAN AND THE TOWN COMMITTEE

## WELCOME AND THANK YOU

As the elected chairman of the local Republican Party, you have a very important and changing role to play in your community. The role is traditional and its importance is apparent: You are the recognized leader of a large segment of the political community. Your party committee may adopt any number of important goals, but your authority rests in your position as head of an organization that nominates candidates for office, and as spokesman for the political concerns of hundreds, perhaps thousands, of citizens.

The chairmanship of a local party is not a position to be taken lightly.

A party chairman must wear many different hats. At times you will be the chief fund-raiser for your organization. You will have to recruit good, strong candidates. You will have to help mobilize and energize the party activists within your community. You will run regular meetings of your committee. You must serve as the party's spokesman. Quite often, you will also be a "cheerleader" and occasionally, a referee. And you must always act in a way that will do you and your committee the most good. It's a big job. But there are tricks of the trade and standard operating procedures and guidelines to help you.

This manual is designed to teach you some of the "tools of the trade". It certainly cannot anticipate every situation you will deal with as chairman, but does offer some proven techniques in the key areas of party politics today.

This section, "The Role of the Chairman," gives you guidance about the role you play in your local GOP organization. The other sections of this manual will cover specific topics in greater detail, such as campaign operations, research, the media, fundraising, and legal requirements. As you use this manual remember to adapt it to your local situation and keep your focus on your goals.

Thank you for taking on this important volunteer role in our American Democracy. You will work long hours and engage many people in your tenure as Town Chairman. However, the rewards of an efficient, honest, and well-run party local republican organization assists our party greatly, not only on the state level, but on the national level as well.

## ADVICE FOR THE NEWLY - ELECTED CHAIRMAN

The first thing you'll want to do is make sure you thank everyone who helped elect you. Your supporters should know how important they are to you; you will need to keep them involved to ensure your committee has the manpower it needs to be successful.

***TIP#1: Start building bridges now to those you defeated or the people who preferred another candidate.***

Even though you have been elected town chairman, you still have to think and act like a candidate. Imagine you have been elected to public office.....what would you do to ensure that you have enough support to be re-elected? What can you do to heal any wounds in the party that may have been opened by the debate over leadership selection? What groups were not a part of your election effort, but should be next time? Even if you don't intend to hold the chairmanship more than one term, thinking like a candidate will help you be more sensitive to your organization and your supporters. Yes, you now have the title of chairman, but you cannot run an organization without help, allies and friends.

***TIP#2: After you have mended your political fences, it is now time to consider your role as chairman.***

A town chairman must play many roles – at times, peacemaker, and, at other times, the bringer of war. You stand at the crossroads where political and governmental decisions are made. Sometimes you soothe the ruffled feelings of a would be candidate for election while another time, you "knock heads together" with a willingness to accept the consequences. It is the chairman's responsibility to ensure public relations opportunities for prospective candidates for office and office holders and not to expect personal glory. On the other hand, the position requires directness and firmness which can make the chair personally unpopular with some segments of the party.

***TIP#3: If an unpopular position must be taken, it is the town chairman's responsibility, not that of the candidate or office holder.***

A town chairman should recognize that when things run smoothly, the candidate or elected officials should reap the reward; but when danger threatens or things go wrong it is the town chairman who must bear the burden of criticism and is often viewed as the "buffer" between an elected official and the local republican organization. When the town chairman speaks publicly, he should understand that his utterances may be misunderstood and receive adverse political interpretation, even when his remarks involve non-political subjects.

***TIP#4: In a town with a Republican administration, a Town Chairman must be a liaison between the elected officials and the Town Committee, while avoiding the role of "political" boss in its usual connotation.***

A few elected officials may seem to assume the role of statesmen after their election and disregard or ignore the established political organization. In some instances this may be necessary, but generally, the elected official who remains cognizant of the representative thinking of his town

committee and who properly represents the voters is most likely to enjoy a good administration. This does not mean that elected officials should give blind allegiance to political expediency. It means that such officials should listen to the advice and counsel of their political organization and make decisions on the basis of merit.

***TIP#5: Probably the most important (and the most difficult) job of a town chairman is to properly motivate the committee members and elected officials, keeping in mind that town committee members are volunteers. A “united” Republican stand or front is a key to success.***

In a town with a Democrat administration, the Republican town chairman must act responsibly in the role of the "loyal opposition", offering alternative suggestions and constructive criticism. It is helpful to have a committee composed of knowledgeable people researching issues and problems, presenting its findings to the town committee, and recommending a stand (or no stand). The town committee, after sufficient discussion, can vote on appropriate action, gaining the widest possible press coverage.

Too much emphasis cannot be placed on the words "knowledgeable" and "constructive". A stand taken without possession of all pertinent facts courts disaster. And to criticize for the sake of criticism without offering suggestions or alternatives leaves a negative impression on the minds of the voters.

***TIP#6: All Republican appointments or re-appointments of members or alternates to town boards and commissions should go through the Republican town committee.***

This may be difficult to do in some places and impossible in others, but is worth striving for because:

1. Town committee recommendations generally assure the town of qualified board members;
2. The town committee will recommend people who won't work at cross-purposes with the Republican Party;
3. The board or commission member is assured of the backing of his party if the going gets rough; and
4. The town chairman (or candidate recruitment committee) can bring candidates along through the minor and major boards to run for major office.

While everyone can think of exceptions to these four points, the basic premise is sound.

The town chairman should as much as possible attend hearings and meetings in town. If he can't attend, he should see to it that someone representing the town committee attends and reports back. This is really the only way to keep on top of events and get a handle on potential campaign issues.

At the same time, the town chairman (and the town committee) should be careful not to insert partisan politics where they don't belong or where it may become counter-productive. Above all, open conflict with Republican elected officials at any level is to be studiously avoided. Disagreements should be settled privately if possible; in any case, not brought to the attention of the press by being aired at a public meeting. There are, of course, notable exceptions but by and large an intra-party fight is not improved by public inspection. Usually, the opposition party reaps the benefits.

## **THE TOWN CHAIRMAN AND THE STATE CENTRAL DISTRICT MEMBERS**

The town chairman should make every effort to support his/her State Central Committee people. Hard feelings held for an entire two-year term can only hurt the town, the district, and the whole political structure. The chairman should try, along with his vice chairman, to attend and support district functions and encourage monthly district meetings and occasional district-wide dinners, picnics, dances, etc. An annual district event that people look forward to is a good idea (many districts sponsor annual Lincoln Day dinners or similar events).

## **THE TOWN CHAIRMAN AND THE TOWN COMMITTEE**

**The primary role of a Chairman is that of administrator**, concerned with the bed-rock activities designed to win elections. Procedures that may prove effective in one town and under one set of circumstances may not produce equally beneficial results in another community. But the chairman's fundamental approach to administration follows a similar pattern irrespective of town differences. Basically, this approach attempts to combine all (or at least most) elements and philosophies into a smooth and competent working organization.

**Formal activities of the chairman include holding town committee meetings.** These should be conducted on a regular monthly basis, with a variety of activities scheduled to encourage maximum attendance. An agenda, mailed to members in advance, is recommended. All meetings should have a specific purpose in mind, for example: the appearance of a prominent speaker; selection of prospective candidates; discussion on the upcoming election; or an analysis of post-election results. Reports from legislators, local officials, and State Central Committee members should constitute regular items on the agenda.

**A town chairman who tries to do too much himself is not a good administrator.** At the same time, a town chairman is responsible for a job not done or poorly done. Therefore, selection of the right person to do the right task constitutes the key to success. Spreading various tasks out to town committee members not only empowers them in the town committee efforts but makes them a loyal participant in your regime as town chairman, as you were the one who empowered them. The creation of sub-committees usually helps spread the various tasks to other participants.

**A new town chairman may be handicapped by not knowing who the "right person" is.** The town chairman should rely to some degree on the advice of others, bearing in mind, however, that there may be people who wouldn't work for his predecessor but who will work for him and vice versa. Generally speaking, a sub-committee chairman should have some experience in the field he is responsible for. For instance, an absentee ballot sub-committee chairman should have previously served on an absentee ballot sub-committee. A new broom sweeps clean but it tends to sweep out experience when you need it most.

**A sub-committee chairman doing a poor job may need help.** Maybe he doesn't understand what is expected. Maybe he needs a deadline, or a bigger sub-committee may need a vice-chairman to get the job done. However, if in spite of all efforts, the sub-committee chairman continues to do poorly, the town chairman should not hesitate to replace him. Likewise, a town chairman should not hesitate to

praise a sub-chairman doing a good job, publicly as well as privately.

Once the sub-committee chairman is appointed, the town chairman can appoint the committee to serve with him or let the chairman appoint the committee or both. Probably both is best because it tends to avoid personality conflicts, and the town chairman can see to it that his best people don't get over-involved (and under-productive).

It may seem like a good idea to move people around from one sub-committee to another to broaden their experience. And if they are agreeable, fine. But oftentimes people find their own niche and, once they learn the job, have no desire to try something new. As long as they do the job, there is no point in trying to change people. You might lose them. Steady, reliable workers are pure gold.

The town chairman should be aware of someone who is coming along and be ready to assume new responsibilities.

Every committee chairman and committee member should have a clear understanding of the job he is taking on, preferably in writing, with a timetable or a deadline. The best workers are always the busiest people and they appreciate knowing what they're getting into ahead of time.

**A town chairman should not serve as campaign chairman and neither should a candidate.** The town chairman may have limited campaign responsibilities, but he still finds more than enough to do in coordinating the efforts of various workers and advising the campaign chairman and campaign committee.

**The town chairman's major responsibility during the campaign is one of administration, guidance, and suggestion** — ensuring that all activities are coordinated and properly organized under the campaign chairman or his subordinate. That does not mean that the campaign chairman's role as administrator be of "arm-chair" variety. Further, it is essential that he approve all public-relations releases.

At times a town chairman may feel that he lacks sufficient support from his committee to do an effective job. Asserting positions from time to time occasionally alienates an opposing town committee member. Opposition from committee members can reach such an extent that even though the chairman is a duly elected official, he may feel that his effectiveness is so limited that he should resign. This, however, should not be a rash decision as a resigning chairman usually creates more fodder for the opposition party to use against us and, in the long run, hurts the Republican Party.

## **RESPONSIBILITIES OF TOWN CHAIRMAN**

1. Publish all notices required by law (i.e. notice of primaries or caucuses).
2. File all papers required by primary or election laws (i.e., see that Treasurer files the appropriate report with the Town Clerk or Secretary of the State).
3. Be certain that the secretary maintains minutes and a proper filing system of your RTC meetings.
4. Keep a constant vigil on all campaign activities.
5. Approve all news releases.
6. Work with Town or City Council or Board of Selectmen in developing qualified persons for elective and appointive office.
7. Ensure an active between-election town committee program.
8. Be responsible for a reasonable flow of information between State Central Committee Headquarters, State Central Committee members, and the town committee.
9. Keep in mind that political interest is maintained also by some social activities such as picnics, etc. Maintain good communications and relations with the local affiliated groups. Encourage their activities; don't just tolerate them.
10. Where feasible, publish a town committee newsletter.
11. Send a letter to all new voters, new Republicans, new citizens, high school graduates, etc.
12. Send "thank you" letters to all persons active in a campaign.
13. Utilize the ability and enthusiasm of the vice-chairman and define their role.
14. Be responsible when possible for a coordinated philosophy among town or city boards.
15. Maintain a year-round finance program with a finance committee, not just a finance chairman.
16. Appoint a voter registration chairman and committee.
17. Maintain a permanent research chairman or committee.
18. After each election, obtain a copy of the voter checkoff lists and send them to State Central.

## LOCAL CHAIRMAN'S CHECKLIST

If you have only recently been elected chairman of your local party, you may be looking for a way to gauge the effectiveness of your organization. Or, as chairman, you may feel it is time to reassess your organization.

In either case, *the following list of questions will help you evaluate your local party, its organization, and its effectiveness.* Please take the time to go through each question. Answer each question with an open mind — being honest with yourself and remaining committed to achieving excellence in every area of your organization. After you have assessed the status of your party operation, the remaining chapters in this manual will help you improve the programs or functions you've identified as needing work.

But **first**, you must make the commitment to do better. After all, the goal of all local party organizations is to elect more Republicans to office. It takes a lot of dedication, involvement and hard work. But it can be done...and there is no better time to start than now.

### **Here is the checklist — good luck!**

#### **GENERAL ORGANIZATION:**

If you have just been elected, what government and/or party authorities must be notified?

Which other party officials also should be notified as a courtesy?

How much money does your committee have in the bank?

Who actually signs the checks?

How are spending decisions made?

How often is the party committee required to meet?

How often should the party committee meet?

Are there clear rules governing the agenda and rules under which these meetings must be run?

Are you or a parliamentarian conversant with the rules of order governing these meetings?

Have you read the party's bylaws?

How are the bylaws adopted or amended?

Are the party bylaws a hindrance to accomplishing the goals of the organization? If so, should they be changed?

What are the laws governing political fundraising in this state?

What other laws and regulations are important to a local party?

***FUNDRAISING:***

How much money was raised last year?

Were any fundraising events held? Were ticket prices for the events high enough to justify the work in selling the tickets?

Was any fundraising direct mail sent out last year? If so, how often? Was it successful?

Does your organization have one or more major donor clubs? Are they successful?

Are enough people involved in your fundraising effort? Are the right people involved in your fundraising effort?

***MEDIA:***

How is the local party viewed by the local media? By the local opinion leaders? By the voting public?

How are your GOP candidates and officeholders viewed by these same groups?

How visible has the local party chairman been in the past? What can the chairman do to improve the local party's image? Is there a regular newsletter to party workers and volunteers?

Do you have good relationships with members of the local working press?

Have you ever made a public statement on local, state, or national policy?

Have you ever issued a public statement pointing out where the Democrats have made a mistake — either as officeholders or during a campaign?

***RELATIONS WITH STATE PARTY:***

Which programs will the state party execute this year? What is the local party's role in them?

How will the state party program change what the local party can or should be doing?

***CAMPAIGNING:***

Who is responsible for writing the campaign plan for the local party?

Who approves the plan for the local party?

Who is responsible for executing the plan?

What parts of last year's plan need to be changed? What parts of last year's plan should be left alone?

What parts of last year's plan were well-intentioned but badly executed? How can these things be improved?

What Republican auxiliaries (Young Republicans, Teenage Republicans, etc.) exist in the area? What should be done to improve or strengthen them?

Was a voter registration drive held last year? What can be done to improve it?

Is a list of registered voters readily available for local Republican campaigns?

How useful is the list? Can it be reproduced on a floppy disk?

Can the list of registered voters be ordered for precinct walks? Are phone numbers available for each voter?

What are the absentee ballot laws in this state?

What program has the local party instituted to ensure every eligible Republican is in fact casting an absentee ballot?

What was done last year to identify favorable voters for local campaigns?

If phone banks were used, were they paid or volunteer?

Were enough phone calls made to identify enough voters to guarantee victory on election day?

How many volunteers are generally available for the local party?

Does the local party supply campaigns with a list of potential volunteers?

Who is in charge of volunteer recruitment for the local party?

What system is in place to keep volunteers active, motivated and, therefore, coming back to help time after time?

Where are the potential pools of volunteers?

How can more volunteers be recruited?

What other responsibilities can be given to your best volunteers?

Who is in charge of candidate recruitment?

Is an exhaustive search made for the best candidates for every office?

Do candidate recruitment efforts start early enough in the election cycle?

Do we target Democrat opponents before starting the candidate recruitment efforts?

What criteria do we use to determine which Democrat officeholders are most vulnerable?

Who is responsible for opposition research?

Was the opposition research complete? Was it done on time? Was it in a usable format?

Are past election results available by precinct?

Have the past election results been analyzed?

Have precincts been targeted based on past election results?

Is survey research a service you want to provide for campaigns? Can you afford it?

Who should do your survey research? When should it be done?

How much money has your party committee given to candidates in the past? How much should they give in the coming elections?

## **RUNNING EFFECTIVE MEETINGS**

As chairman of your town committee you will have to run meetings — in some cases a lot of them. Remember that every time you host or chair a meeting your reputation as a leader is on the line.

The agenda, the topics you choose to discuss, the participants you invite, and even the place you hold your meeting, make a statement about your effectiveness as a party leader and bears directly on your success as chairman. Considering the importance of meetings, it is odd that chairmen devote so little time to planning and thinking through the goals and structure of their meetings.

Most of us schedule meetings hoping that somehow the agenda will work itself out, and the meeting will run smoothly. The truth is that the success of a meeting is often directly proportional to the amount of time spent in preparation. Your bylaws may already prescribe that your meeting must use Roberts Rules of Order or some other parliamentary procedure. Even if they don't, many town committees adopt Robert's Rules of Order as their rules of procedure. It is important that you use some kind of impartial system, and that you are versed in the uses of it. At least make sure someone knows how the system works. If necessary, appoint a parliamentarian.

*Here are some easy to follow guidelines to running better meetings.*

1. Before the meeting figure out what your goals are.  
Never hold a meeting without knowing what you want to accomplish. You may have bylaws that require you to hold periodic meetings, but that does not exempt you from planning those meetings. Not knowing what you want out of a meeting is a sure recipe for disaster.
  
2. Limit the number of tasks each meeting will seek to accomplish.  
A meeting that attempts to solve all of an organization's problems will end up solving none of them. Any one meeting can only carry so much freight; too much, and either the meeting runs so long that people leave or, even worse, they lose interest. A well thought-out meeting will seek to manage several topics well rather than many topics poorly.  
  
If you are meeting to approve a complicated subject, like the budget, don't also schedule debate on next year's convention. Most meetings can't handle more than three or four topics. The rule of thumb is always to schedule less than you think you can handle. Few people object to a meeting that ends early.
  
3. Choose the participants with care.  
Sometimes you cannot choose who attends your meetings. When you do have the choice, pick your participants carefully. If you need participation from each attendee, be careful not to make the meeting too large. If the goal is to build consensus in the party at large, you can't make the meeting too small.  
  
Sometimes you will want to include people with strongly held divergent convictions so that the debate will be interesting and lively. Other times you will want a fairly homogenous group, so that more time will be spent on planning and less on theory. Your meeting goals are the best guide to determining which people should participate.
  
4. Arrive early.  
This allows you to get a feel for the room and to solve any problems before the meeting starts. How many meetings have you been to where the microphone or other audio-visual equipment didn't work? Or no one could find the light switch? Or the coffee pot wasn't plugged in? Showing up early gives you time to solve these little problems as well as greet people before the meeting.
  
5. Start on time.  
Hopefully, you told everyone when the meeting would start. Start on time. If you can't be trusted to keep your word on a small thing like this, can you be trusted with greater responsibilities? Starting late is an insult to the people who show up on time and to the purpose of the meeting. It is also the number one reason meetings end late. If you start on time consistently, everyone else will begin showing up on time too.

6. Use an agenda.  
Agendas are wonderful at keeping meetings focused. Don't have a meeting without one. For best results, send out the agenda in advance of the meeting. That way people know what to expect and what topics will be covered. During the meeting you can use the agenda to keep the discussion on track as well as override non-germane topics. "We'll get to that subject under 'New Business', but for now let's finish up the treasurer's report."
7. Let everyone know when the meeting begins.  
Start the meeting with a bang. Bang the gavel, holler for attention, hit your water glass with a spoon, but make sure everyone knows the meeting has started. Do not slide into a meeting. This degrades the importance of what you are doing. If you do not get the participants' attention up front, they may miss your first comments as well as disrupt the meeting by talking.
8. Try to look impartial.  
You may not be impartial, but if you want people to talk freely, you must act impartial. As chairman of the meeting you are expected to let everyone have his or her say. The more unbiased you can appear, the better your ability to control the meeting and gather opinions. If people think you have already made up your mind, and you reinforce that feeling, they will decide they are being railroaded and will either check out or get mad.
9. Seek contributions from people.  
Don't force people to speak, but make sure everyone has an opportunity. Every meeting develops into a discussion or debate between two or three strong (or loud) individuals. If you don't call on the other folks in the meeting and ask their opinions you may never hear from them.
10. Keep the meeting moving.  
Push the meeting forward. If things get bogged down on a sticky subject, push the meeting on to the next topic. Put sticky or difficult subjects last on the agenda; you will find they become much smoother and easier to handle. No one wants to address an empty room, and few are willing to risk the wrath of their fellows for running the meeting into overtime. Besides, most everyone has already spoken and many are tired and want to go home. This is the best time to forge a compromise.
11. End the meeting.  
Do not let the meeting dribble away. If you can, sum up the accomplishments of the meeting before you adjourn. When the meeting is over, bang the gavel, vote for adjournment, blow a whistle — something to let people know they can leave. Try to end on time and set the date for the next meeting date, time, and location.

## **REMINDERS FOR THE PRESIDING OFFICER**

1. Correct procedure should always be your goal.
2. In dealing with motions or amendments, always state the exact wording. Ask the secretary to read it if you forgot how it was phrased.
3. Discussion is not in order until the motion has been stated by the chair.
4. The chairman does not enter discussion while presiding.
5. Always indicate clearly how a vote is to be taken (show of hands, aye/nay, roll call, written ballot).
6. Always call for the negative vote, saying, "those opposed say no."
7. Adoption of an amendment does not mean adoption of the main motion. Remember to state the main motion as amended.

### ***Order of Bringing a Motion to a Vote***

1. Make motion
2. Second motion
3. Amend the motion
4. Second the amendment
5. Discussion of amendment
6. Vote - on amendment
7. Announce passage or failure of amendment
8. Read motion as amended (or not amended, if amendment failed)
9. Further discussion on the motion
10. Other amendments if offered (same procedure as in Steps 3-7)
11. Final vote on motion
12. Announce passage or defeat of motion

# **PARLIAMENTARY PROCEDURE/HOW TO CHAIR A MEETING**

## **I. Types of Motions**

- A. Main Motions - introduce subjects to the town committee.
  - 1. Cannot be made when another motion is before the town committee.
  - 2. Yield to subsidiary, privileged, and incidental motions.
- B. Subsidiary motions - change or affect the main motion.
  - 1. Only one amendment to the main motion is appropriate at one time
  - 2. Only one amendment to each amendment is appropriate at one time.
- C. Incidental motions - question procedure, arise from other motions.
  - 1. Must be considered before the other motion.
  - 2. Examples are suspension of rules, points of order (raise a question), etc.
- D. Privileged motions
  - 1. Concerned with special matters not related to pending business.
  - 2. Examples are adjournment, recess, terminate an open portion of meetings, etc.

## **II. How to present a motion**

- A. Obtain the floor (last speaker must finish first).
  - 1. Rise and address the chairman ("Mr. Chairman").
  - 2. Give your name.
  - 3. Wait until the chairman recognizes you by repeating your name.
- B. Make your motion - wait for a second (if none, the motion is lost).
- C. Chairman will state your motion.
  - 1. Chairman says, "It is moved and seconded that...".
  - 2. The motion is then "town committee property" and cannot be changed without the consent of the town committee.
- D. Explain the motion.
  - 1. The mover is allowed to speak first.

2. Technically, the mover may speak again only after all other speakers, unless a motion to suspend the rules is passed (2/3 vote).. Practically, the mover is permitted to speak again when the member who has the floor yields (his time).
- E. At this point there may be a motion or motions to amend the main motion (needs a second), then you discuss the amendment, vote on it first - then vote on the main motion (as amended, or if amendment fail, as originally presented). \*Remember - only one amendment at a time may be considered).
- F. Putting the question before the committee.
1. Chairman asks, "Are you ready for the question?"  
(If there is no more discussion, a vote is taken.)
  2. Or a member may move the previous question.  
(A favorable vote terminates debate.)
  3. Or the chairman (if opposition is unlikely) may assume consent by saying, "If there is no objection...".

### **III. Motions**

<b>To Do This</b>	<b>Motion</b>	<b>Interrupt Speaker?</b>	<b>2nd</b>	<b>Debate</b>	<b>Amend</b>	<b>Vote</b>	<b>Recon- sider</b>
Introduce Business	Main Motions	No	Yes	Yes	Yes	51%	Yes if Affirm
Kill the Motion	Postpone indefinitely	No	Yes	Yes	Yes	51%	
Amend a Motion	"to amend"	No	Yes	Yes	Yes	51%	Yes
Study further	"to refer to committee"	No	Yes	Yes	Yes	51%	No
Postpone Discussion	"Postpone the discussion until"	No	Yes	Yes	Yes	51%	Yes
End Debate and Amendments	"I move the previous question"	No	Yes	No	No	2/3	No
Postpone Discussion (without killing)	Table	No	Yes	No	No	51%	No
Complain about heat, noise, etc.	"I rise to a question of privilege"	Yes	No	No	No	None	Usually not
Call a break	Recess	No	Yes	No	Yes	51%	No
Adjourn	Adjourn	No	Yes	No	No	51%	No
Suspend rules temporarily	"to move...so that"	No	Yes	No	No	2/3	No

<b>To Do This</b>	<b>Motion</b>	<b>Interrupt Speaker?</b>	<b>2nd</b>	<b>Debate</b>	<b>Amend</b>	<b>Vote</b>	<b>Recon- sider</b>
Avoid considering an improper motion	"I object to consideration of this motion"	Yes	No	No	No	2/3	Yes
Request information	"point of information"	Yes	No	No	No	Vote	No
Take up a matter previously tabled	"I move to take from the table..."	No	Yes	No	No	51%	No
Reconsider a hasty motion	"I move to reconsider the vote on..."	Yes	Yes	Yes	No	51%	No

## **SAMPLE AGENDA**

### ***SUGGESTED ORDER OF BUSINESS***

- A. Call to order - promptly at stated hour
- B. Roll call\*
- C. Introduction of guests
- D. Minutes of last meeting - adopted (as read or with additions and/or corrections).
- E. Treasurer's report
- F. Correspondence
- G. Reports of standing sub-committees
- H. Old business - including reports of special committees
- I. New business - including plan for next meeting
- J. Speaker
- K. Points of Personal Privilege
- L. Adjournment

\*Sometimes it is better to conclude the formal part of the meeting and adjourn before introducing the speaker or let the speaker address the group right after the Roll Call.

## HOW TO REVISE LOCAL PARTY RULES

Local party rules should be reviewed and, if necessary, revised at least every other term; that is, every four years. It is surprising how quickly they become outdated.

A rules revision committee appointed for this purpose can do the job in two meetings if it wants to or has to. If it has no deadline, it will take forever. Therefore, set a date for the new rules to take effect - perhaps the date the next town committee is elected. Any revised or updated local rules must, by law, be on file, in duplicate, in the Secretary of State's Office and the Republican State Central Committee Headquarters at least 60 days prior to any endorsement action taken under such amendments. (This includes endorsement of town committee, delegates, municipal officers, etc.) Thus, the town committee may not operate under any rules which have not met the 60 day cut off. A complete airing of the changes at this meeting will usually head off trouble when they are finally acted on, which should be at least one week before they plan to file them outside the 60 day cut off.

A legal notice appearing five days (counting weekends and holidays, but not the day the acting body meets) prior to the caucus or town committee meeting or convention which will act on the proposed changes must be published in the newspaper.

Once accepted, send (or deliver) two copies of the change plus two copies of the complete rules with amendment to the Elections Division of the office of the Secretary of State, 30 Trinity Street, Hartford and a copy to Republican State Central Committee headquarters. Remember this must be received at least sixty days before they are to take effect.

## RULES FOR RULES

Local party rules cannot be in conflict with State Party Rules or state or federal laws. Following are some of the things they must, may, or cannot say:

### **Town Committee Members:**

1. Must be Republican electors in the town and reside in the voting district from which they are elected.
2. Once elected, cannot be removed except if they become ineligible from changes in residence or party affiliation.
3. Are elected to fill vacancies by majority vote of the remaining of the town committee, or the remaining members of a district, if election is by district, and no other way.

### **Local Party Rules Must:**

1. Establish the size of the town committee.
2. Establish number constituting a quorum.
3. Establish the means of electing town committee members, amending local party rules, selecting party endorsed candidates and delegates by caucus, town committee, or convention.
4. Require a minimum of two meetings per calendar year quarter.

**Local Party Rules May (but need not):**

1. Require written application by those desiring to fill a vacancy.
2. Require monthly meetings.
3. Establish an executive committee and standing committees.
4. Establish Honorary and/or associate (non-voting) memberships.
5. Require the chairman of the town committee to be a member of the town committee.

**Local Party Rules Cannot:**

1. Set age limit for Town Committee members.
2. Ban husband and wife from both being members.
3. Limit the number of terms a member may serve.
4. Require members to pay dues.

**Local Party Rules Must Be Amended To:**

1. Change the size of the town committee membership. Amendments must specify what the change is, what the effective date is; and, if enlarged, how elected.
2. Change the organization - the number and kind of officers.
3. Change the procedure by which the town committee makes its endorsements (i.e., by town committee, caucus, or convention).
4. Change, generally, anything set down in the present rules.

## **TOWN COMMITTEE OFFICERS**

Under state party rules, each town committee must have, in addition to a town chairman, a vice chairman, secretary and treasurer. The town committee may also create standing committees according to local party rules and can appoint chairmen to those standing committees. The responsibilities of each of the leaders is further outlined in Article 11, Section 4 of the Connecticut Republican state central committee rules, and the local party rules. Below is a brief description of each of these leadership positions.

**Vice Chairman**

The vice chairman assists the town chairman in all of duties. In the event of a vacancy in the office of town chairman, the vice chairman shall be responsible for determining the time, date and place for a meeting to select a new town chairman. The vice chairman is also the chair of any meeting of the town committee in the absence of the town chairman.

**Treasurer**

The town committee treasurer is the chief fiscal officer of the local party. The treasurer receives all contributions and pays all bills. The treasurer is responsible for maintaining all financial records of the town committee and for filing all campaign finance reports. It is extremely helpful to elect a treasurer who attends meetings regularly and is easily available during times the committee is not meeting.

## Secretary

The town committee secretary reads and takes the minutes of each town committee meeting, and handles town committee correspondence as directed by the town committee. The secretary also keeps attendance records of town committee meetings for future reference for town committee nominations. The secretary also maintains the up-to-date membership list of town committee. Some town committees require a recording secretary and a corresponding secretary, depending on the size of the town committee. Also, the secretary sends out all meeting notices.

## Town Committee Members

The town committee member is, above all, an elected representative of the Republican party. As such, he or she must put the needs of the Republican party above his or her own personal likes and dislikes. Town committee members are free to support the candidates of their choice in caucus, town committee elections, or during a primary. *However, after the decision has been made as to which candidate will be the endorsed Republican candidate, town committee members should support that person.*

**If a town committee member chooses to support an opposition candidate it is his or her duty to resign from the town committee because he is no longer representing the wishes of those who elected him nor is he fulfilling the responsibilities of being an elected Republican official**

Finally, if a town committee members finds themselves pressed for time because of other commitments, or unable to contribute to town committee, they should step aside to make room for new, more active members to the town committee.

## STANDING AND AD HOC COMMITTEES

The town committee chairman appoints committees to fulfill the charge of the town committee. Some of these committees may be permanent, or standing committees. Others may be established for special events. These committees are called ad hoc committees. Chairmen of these committees may serve on the "executive committee" (also known as a steering committee) which is either elected by the town committee or appointed by the town chairman.

Below is a brief description of the responsibilities of typical standing committees. More information regarding each of their responsibilities can be found in other chapters of the handbook.

## Nominating Committee

The nominating committee is charged with filling a slate of candidates for local elections, delegate elections, town committee elections, town committee vacancies, and recommending appointments to fill vacancies to elected and appointed offices.

### **Finance Committee**

Almost everything your town committee does costs money. How will the town committee raise money? There are as many ways to raise money as there are to spend it. That is why every town committee needs a finance committee. The finance committee is responsible for raising funds for town committee efforts in state-wide as well as local elections and for the costs of running the organization itself. Because the finance committee is bound by many state campaign finance laws, the town committee treasurer should be a member of the finance committee as well. More information on this subject can be found in the Fundraising chapter of this manual.

### **Public Relations Committee**

It is the job of the public relations committee to create a positive perception of the town committee and Republican candidates by the media and other interested parties. Whether it be writing press releases; designing town committee letterhead, posters, bumper stickers or other promotional material; or advising the town chairman or candidates about the best way to "frame" an issue, the goal of the public relations committee is to create a positive public perception of the Republican activities. More information on how to maintain good public relations program can be found later in this manual.

### **Research Committee**

This committee is responsible for "digging up" every issue on the local level and about the opposition. The committee should know both sides of every issue and should be able to brief the town committee on these issues.

When playing on the political field, it is important to make sure that all information is researched carefully, can be backed up with facts, and is up to date. Nothing is more embarrassing than having the town committee put out a press release with the wrong information or after a problem has already been resolved. Credibility is key, and the issues committees is responsible for that credibility.

Opposition research is a very important part of this committee's job. Opposition research should be done to discover the background of your Democrat opponent so that contrasts can be drawn between candidates during election year. More information on this subject can be found later in this manual.

### **Voter Registration Committee**

This committee is responsible for bringing as many new Republicans to the fold as possible. This committee may also be expanded to oversee other organizational matters, such as volunteer recruitment. More information on voter registration can be found later in this manual.

# **CAMPAIGN OPERATIONS**

# CANDIDATE RECRUITMENT

Recruiting qualified candidates is one of the primary responsibilities of the town chairmen. One objective for your Republican organization should be to field the best possible candidates for every elective office. The better the candidates, the more likely you'll be celebrating on election night.

## **The basic elements of successful candidate recruitment are fairly straightforward:**

- Complete the research to determine the characteristics of the ideal candidate for the race.
- Convince the political community in the district that the seat is winnable and enlist its support in persuading a good candidate to run.
- Mobilize party and community resources to identify good potential candidates.
- Demonstrate to potential candidates that the seat is winnable and/or that there are good reasons to run even if victory is not probable.
- Demonstrate that the rewards of service compensate for the impact on his or her personal/family life and career.
- Demonstrate to a potential candidate that the money can be raised to win the seat.

## ASSESSING THE DISTRICT

The first step in the recruitment process is understanding the district. At a minimum, this requires doing a basic precinct analysis, understanding the demographic profile of the district, and understanding how its citizens make a living. If you have developed a political plan, you have probably already done most of the tough work.

### *Why is it important to analyze the district first?*

One of the keys to candidate recruitment is convincing the potential candidate that he or she can win. To do this you must demonstrate other Republican candidates' previous electoral successes in this particular district. Understanding the demographics of the district and how its residents make a living will help you locate attractive candidates.

In researching the area, you will learn the names of community leaders who might possibly be good candidates. Many of these leaders will not be "political" people or elected officials, but people who command respect in other areas of community life.

## ASSESSING THE OPPONENT

In recruiting a candidate to run against a Democrat incumbent, you must first attempt to demonstrate that the incumbent is vulnerable. Failing that, you must at least **show** that the electorate has credible reasons to vote against the opponent. Demonstrate in clear and compelling terms the message and issues that can be powerfully asserted by a Republican candidate to beat the opponent.

Survey research on the Democrat can be a powerful recruiting tool. If analyzed properly, you can use it to show which themes and messages can be used to defeat the incumbent. It is very difficult to answer a potential candidate's fundamental question about how she or he can win the campaign without doing at least some opposition research on the opponent.

***For a start, look for the "six deadly sins" that good opposition research can find:***

Specifically, find out if the opponent has:

- voted to raise taxes;
- raised salaries for himself/herself;
- taken other excessive "perks" of the office;
- missed too many votes or other easy measures of nonperformance;
- recently moved into the district -- a "carpetbagger".
- taken no action on an important/emotional issue; or
- repeated any of the above offenses.

If running against an incumbent, closely analyze his last two races as well as the **first** race when he was elected to the office. Find out what promises were made and how the campaigns were run.

## **DEFINING THE IDEAL CANDIDATE**

The term "ideal candidate" is a misnomer; no candidate is truly "ideal". The term "ideal" suggests there is only one satisfactory type of Republican candidate, which is simply not the case. As a party, our strength should be in the diversity of Republicans running for elected office. Defining the "ideal" candidate simply helps us focus on the most important characteristics a candidate needs to be successful in a specific situation.

The ideal candidate combines two qualities: generic skills that are helpful wherever the candidate runs, and specific skills that fit the district and this campaign. The generic skills incorporate the ability to withstand the emotional rigors of the campaign, to develop a core of support, to motivate people, to ask for money (or finance the campaign themselves), and to form a solid dedication to the campaign.

The ideal candidate also fits the district and the specific campaign situation. In other words, based on candidate qualities, demographic characteristics, opposition research, and survey research, this candidate matches the district make-up unusually well and/or provides a strong contrast to the opponent.

A candidate whose strengths present a good contrast to the incumbent can be an ideal candidate. For instance, if the district is heavily blue collar, but the incumbent is a banker or other white-collar professional, you might want to look at recruiting a blue collar candidate. Likewise, if the Democrat candidate is from a less populated part of the district, you may want to recruit a candidate from the more populous section of the district.

## DEFINING A "GOOD" CANDIDATE

Here are some commonly agreed upon characteristics of a "good" candidate:

### 1. Character

The candidate has to be able to withstand the emotional and physical demands of a campaign. He must be able to identify with other people, and must believe that he ought to be elected.

### 2. Organization

The candidate must have the absolutely dedicated support of at least 6-10 people (and probably more in a large scale race). He must be able to motivate people. Along with the manager and staff the candidate must have the ability to pull together the people and financial resources to win a campaign.

### 3. Finance

The candidate must be able to ask for money (or to write a check to finance the campaign). Also, he must have access or contact with the financial/donor community in the district.

### 4. Vulnerable Opponent

The opponent must be vulnerable, or at least there must be a compelling reason why the opponent should be replaced.

### 5. Power Base

The candidate must have some base of support, either political, geographic, financial, volunteer, or ideological.

### 6. Fire-in-the-Belly

The candidate must want to win badly enough to make the sacrifices required to win.

Even if a candidate passes these six standards, he must make other, more personal judgments about the impact of the campaign.

***There are three other essential areas that should be explored to determine if a person will make a good candidate:***

1. Does his family fully support the candidacy?
2. Can he financially afford to run?
3. Will his background withstand scrutiny?

These items are beyond the scope of this manual. You can ask the candidate about his background and possibly assist him in preparing responses to attacks. There's not much chance you can talk a spouse or the children into supporting the idea, but you may be able to help by explaining the nature of the job, and being truthful about the good and bad points of public service.

## DEVELOPING A LIST OF POTENTIAL CANDIDATES

Developing the list of potential candidates is a three-step process:

1. Develop a profile of the "ideal" candidate.
2. Ask party leaders, financial and community leaders, former candidates and other opinion leaders in the district for advice and names.
3. Use the candidate profile and other questions to help stimulate thinking about who would make a good candidate.

There are several places to look for good candidates. First, make sure you have a list of every elected Republican qualified to run for the seat -- even if elected to a non-partisan office.

Second, carefully review previous losing candidates with a fresh perspective. If a previous losing candidate has some remaining name identification or retains some political support, determine whether a new candidate really will be substantially better than the previous one. Sometimes very good candidates lose because the top of the ticket drags them down, because the incumbent got lucky, or for many other reasons that have nothing to do with the candidate's ability to win the race.

A third place to look is at community leaders who are active in nonpolitical ways. This year's chairman of the United Way, a well-liked high school coach, or a local notable such as an author or newspaper editor may be a great candidate.

The important thing to remember is not to look just within the party circle for candidates. There may be a lot of community "heroes" in your area who would make terrific candidates. Just because someone has never been heavily involved in politics does not mean they are not "just what the district needs". Too often, opportunities are missed because our vision is not broad enough.

## DEVELOPING SUPPORT IN THE POLITICAL COMMUNITY WHILE IN THE PROCESS OF RECRUITING A CANDIDATE

When deciding whether to run, the prospective candidate will consult other elected Republican officials, party and financial leaders, and the opinion leaders of the community. Despite survey data suggesting the Democrat's vulnerability, if the political and community leadership do not think the GOP candidate can win, the odds of the prospective candidate entering the race are **far** lower.

The party and the person handling recruiting should put together a prospectus demonstrating why this campaign is winnable and how it could be won. This material should be reviewed each time the recruiter meets with people in the district while generating the list of potential candidates. In other words, a very important role for the recruiter is to help convince people that the district **can be won.**

Increase your probability of success in recruiting a candidate by convincing the larger political community — and not simply a prospective candidate — that the race is winnable.

*If the race is not clearly winnable, there are still several persuasive reasons why a candidate should be recruited. Consider the following reasons:*

1. A district may be winnable if you take a multi-cycle approach to defeating an incumbent. Sometimes, it is necessary for a candidate to establish credibility in one election cycle by building a grassroots organization, establishing a financial base, increasing his/her name identification, and developing a contrast with the incumbent on a number of issues. Then, the next election cycle, they start with a much higher level of credibility and make the campaign a competitive race. This is called the “2-election” strategy.
2. Sometimes, it is very valuable for a candidate to run in a district to tie up a Democrat incumbent's resources. If there is not a challenge candidate, the Democrat incumbent is free to use resources to help other Democrat candidates who are in tough races. If the incumbent has to contend with an opponent, they are likely to devote time and money to their own campaign.
3. Republican candidates at other levels on the ticket (below or above) can greatly **benefit** by having a full slate. Voter drop off is less if there is someone to vote for in each slot.
4. Running for office can be very beneficial to someone's business, community involvement, or future political activities. Obviously, being a candidate gives an opportunity to meet a lot of people in the Republican party structure as well as in the community. These contacts can turn into friends, business clients, co-workers on community projects, etc.

If you decide to recruit candidates for districts that are not clearly winnable, the same amount of care and time should be devoted to preparing a prospectus demonstrating why it is important to have a strong, credible candidate on the ballot.

## **DEFINING THE PARTY SERVICES THAT CAN ENCOURAGE CANDIDATES TO RUN**

Supporting candidate recruitment may mean providing a package of services which a potential candidate can use during the campaign. Many candidates have said a key reason they decided to run was that people and resources existed to help them. The **Republican party has an obligation to marshal its people and its resources to fully support the candidate recruitment effort.**

An important task for the local party is to help a new candidate develop the abilities and resources required to win a campaign. You should develop a list of all the services you can provide to a candidate. If the state party is willing to assist, include their services on your list.

## **DEMONSTRATING THAT THE MONEY CAN BE RAISED TO WIN**

Demonstrating to a prospective candidate that money can be raised to win the election is an important factor in recruitment. If you can, offer direct financial assistance, and/or significant assistance in helping the candidate raise funds. One option, as part of the effort to recruit a candidate, is to help line up major donors to provide the "seed money" for the campaign to get started.

It is also very important for the person handling the recruiting to be able to demonstrate to the prospective candidate how the campaign will be able to raise the money required to win. It is a good idea to have a rough finance plan ready.

## **THE ROLE OF FUNDRAISING ASSISTANCE AND PROMISES OF FINANCIAL SUPPORT IN CANDIDATE RECRUITMENT**

The more experienced the candidate, the more the recruitment conversation will center on money. You should never be in a candidate recruitment situation without fully understanding the limits of your authority to commit funds or services. If money is discussed, but in your mind not definitely committed, this is a point which should be reinforced at the end of the meeting.

Too often, the party has tried to recruit candidates simply by offering to underwrite the campaign. The consequences have often been lazy candidates and inadequate funds. As much as possible, offers of direct financial assistance should be avoided. Emphasize the other services the Republican party or caucus can provide.

There is no question that direct or in-kind financial support is many times the most salient part of the recruitment conversation. Candidates understandably want as much financial support as possible, with minimal strings attached.

Many party leaders will concede that committing too much money with no strings attached helps neither the candidate nor the party. It seems prudent to provide some early money to help the campaign get established and then commit additional money as the campaign raises funds on its own.

## **MEETING WITH PROSPECTIVE CANDIDATES**

The primary objective of a first meeting with a prospective candidate is to get a commitment to some follow-up action. This could be as simple as an agreement to read through the materials you provided about the race, set up a meeting with others in the district to talk again about running, or set up a meeting in the state capital. You want to leave the meeting with the door open and without a definite "no".

The other objectives of the first meeting are to establish a personal rapport, to outline why you believe the race is winnable, or why the party needs this person to run. It is important that you listen to their concerns about the pros and cons of a possible campaign.

Start the meeting by introducing yourself and your purpose for being there. It is much easier for the potential candidate to talk about himself and his own background if you introduce yourself and talk about your background first. Move your discussion toward the campaign by asking the prospective candidate about his or her exposure to the current incumbent. Has he had much contact with the incumbent? Does he think the incumbent is doing a good job for the people of the district?

Use the conversation about the other candidate as a transition into your material about why the race is winnable. Quickly summarize your major observations about why the opponent is beatable based on your research findings. As much as possible, include vignettes from your other meetings with the district's political leadership to demonstrate your understanding of the local political environment.

List the other reasons why the potential candidate might want to make the race. There is no telling what might motivate a potential candidate. Some will be lured by the chance to run for higher office in the future. Others want to help the Republican party. Others will figure that the exposure they receive will benefit their business. Still others will want a platform to talk about an idea or issue they think is important.

List as many benefits as possible for the potential candidate, and see which ones draw a response. Then you can follow up at a later meeting with additional information on that topic.

***The following are tips on how to use research information when meeting with a prospective candidate:***

- Research the potential candidate as much as you can before your first meeting. What are his interests? What are his basic concerns? What is his financial status? How old the children? Has he ever been under the kind of stresses that will have to be endured in a campaign?
- Do not overwhelm the candidate with mounds of paper. Reduce the salient and most compelling facts to only a few pages.
- Help candidates visualize how the material can be used in a campaign context by showing them previous campaign ads.
- Look for the "one vote margin" committee/floor votes that demonstrate the difference the potential candidate can make in office.

Try to understand the major hurdles a candidate must clear in order to decide to run: family support; the ability to take time off from work to campaign; confidence that the money could be raised; whether or not he/she believes the race can be won.

End the meeting talking about winning and getting a commitment to a next step. Close with a brief summary of why the race is winnable, reinforce whatever "hot-button" seemed to move the prospect, and be enthused about his considering being a candidate.

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## MOVING A CANDIDATE FROM INTEREST TO COMMITMENT

It is difficult to help a candidate resolve fundamental issues about the impact of running on family and career. To convince the candidate that he should run, here are some steps that should be followed:

1. Focus on selling the candidate on the merits and importance of the office.
2. Explain again the benefits running will have on one's career.
3. Explain again how important it is to the party (if the candidate is a party activist) that a good candidate run for this seat.
4. Defend his ability to win.
5. Demonstrate the broad support in the political community for his candidacy.

**One tip: If a candidate promises to decide by a certain date and does not, the odds of his actually running drop dramatically. After a certain point, people do not really need "just a few more days" if they really want to run.**

Create a mini-campaign to help get a prospective candidate over the hump of interest to a final commitment. Stay in close touch, and mobilize members of the candidate's decision-making circle and the political community to support your efforts. Find out whom the prospective candidate will consult to help make the decision, then present your positive views to as many of these people as possible.

Develop a realistic and focused campaign to answer the candidate's concerns and questions.

Let the candidate's peers sell the attributes of the office. If possible, have elected GOP officials call the potential candidate and urge him or her to run. Few people are not susceptible to flattery.

Many times the primary hesitation of first time candidates is simply that they are a bit overwhelmed about getting started. What may strike the experienced political activist as fairly basic "first steps" in being a candidate (legally filing for the seat, getting petitions signed, setting up an announcement press conference, etc.) can actually look a bit daunting to a first-time candidate.

The town committee may want to specifically adopt a set of support services that helps make the first entry into politics as hassle free for the candidate as possible.

Help the candidate by establishing the criteria for making the decision and selecting a date by which the decision should be made. It does not help anyone to leave this process open forever.

Do not forget that state law allows the creation of an exploratory committee prior to a final decision about running.

The final frustration is your limited insight and contact with the two most critical factors in the decision: family and career. Accordingly, do not despair if you do everything else right and lose candidates due to one of these factors.

## **CHECKLIST:**

### **SOME SUGGESTED QUESTIONS TO GET PEOPLE TO THINK ABOUT RUNNING FOR OFFICE**

1. Who has his or her own money and has always wanted to run for something?
2. If you returned to your office and had a series of messages from different people active in the community, who would you call back first?
3. Whose name, based on community involvement, family name or other positive factors, would at least two out of ten people recognize in this district?
4. Who are the visible people in the district's largest industry/employer? Of this group, who is active in the community?
5. Who are the two or three people you think are the most respected members of this community?
6. Who are the two or three people who seem to be especially active in social, church, community, and other volunteer service work?
7. Who has raised money for other Republican candidates and might make good candidates themselves?
8. What Republican staff person for an elected official has established a lot of credibility in his or her own right?
9. Do people with an old and established political name live here?
10. Are there any "stars" in the district (former POWs, former athletes, etc.)?
11. Among all the people we have been talking about, against whom do you think the incumbent Democrat would be most afraid to run?

## **CHECKLIST:**

### **A LISTING OF PRODUCTS AND SERVICES YOU MIGHT MAKE AVAILABLE TO PROSPECTIVE CANDIDATES**

The following is a selection of ideas and services you might be able to offer to candidates. Your resources are the only limit to what you can do.

1. Candidate training seminars.
2. Special video-coaching/debate preparation sessions.
3. Strategic research profiles.
4. Vote record research — including special analysis of top 20-40 votes with an explanation of what each bill would have accomplished.
5. Demographic profile of the district (census bureau statistics, etc.).
6. Use of staff or volunteers to draft a campaign plan, monitor the campaign, and provide direct assistance, as required.
7. "Buddy program" in which an already elected official "adopts" a challenger and helps the campaign.
8. Direct financial assistance and/a significant in-kind contributions.
9. Access to donor lists, help in setting up meetings with major donors.
10. Voter lists and products.
11. Voter identification program.
12. Get-out-the-vote programs.

## QUESTIONS POTENTIAL CANDIDATES ASK

1. Why do you think I can win? If I don't win, will anyone help me with the campaign debt? Realistically, what do you see as my negatives as a candidate?
2. What is it really like to be a candidate? What happens to my business and family while I am running? How many hours a week do you realistically think I can put in until the last two months of the campaign?
3. What is the salary and benefits of (fill in office)? How much information about my personal finances does the financial disclosure form demand? Politically, will I have to release my tax statements in addition to the financial disclosure form?
4. Does getting elected mean any cap on my income or having to excuse myself from some of my business activities?
5. What's the point of getting elected anyway? How much can you really get done in (fill in office)?
6. How much money will the party give to my campaign? If you won't commit to an absolute figure, why should I put myself out on a limb then worry that you'll saw it off?
7. Will mine be a targeted campaign? Who makes that decision and what if you tell me I am targeted now and then change your mind?
8. How much will it cost to absolutely assure I have enough votes to win? Where am I going to raise that kind of money?
9. If the incumbent is so vulnerable, why hasn't he lost before now?
10. You said you think the incumbent is vulnerable because he supports the... (fill-in the issue). Well, you may not know it, but that's been tried now for the last two elections. Why do you think it's going to work this time?
11. Who is going to be the one to tell my spouse I am running?!
12. When is the filing deadline? When do I really have to make up my mind?
13. Can I take corporate money?
14. I don't want to run a negative campaign. It's my sense people just want to hear more about the candidate's stands on the issues. Do you think I can win without criticizing my opponent's record?

## CHECKLIST:

### BASIC TOPICS TO COVER IN A CANDIDATE RECRUITMENT MEETING

A candidate's unique concerns, questions, and individual strengths and weaknesses often become clear in an initial meeting. Accordingly, no two candidate recruitment meetings will be exactly alike. However, to help you prepare for your first meeting here is a checklist of topics often covered in a candidate recruitment session.

1. Discuss why you believe the race is winnable and an attractive opportunity.
2. Discuss why you believe the funds can be raised to win this race.
3. Discuss why the prospective offers a unique set of strengths that will provide a needed contrast with the opponent.
4. Be familiar enough with the responsibilities of the office to discuss credibly why this office is important. Be able to tell the candidate what can be done in the office to help serve the community.
5. Discuss the probable nature and tenor of the campaign and what will be required of the candidate to win this particular office.
6. Find out what the candidate feels he would bring to this process. How do they view their own strengths? Which strengths would help them win the campaign?
7. Even though he is not yet committed, discuss why he might be willing to discuss running. What motivates him to consider running for office?
8. Talk about the importance of this race to the future of the Republican party, if applicable. Review which party leaders are interested in the possible candidacy.
9. Begin to discuss concerns about the impact on career and family. Even a failure race for office might be a boon to a career.
10. Prepare realistic options for next steps that help a candidate continue the process.
11. The **first** meeting is not the time to introduce the fabled "skeletons-in-the-closet" discussion. Prior to introducing this topic, it is wise to have established a better rapport than one meeting can permit.

**DEVELOPING A LOCAL  
POLITICAL PLAN**

## **WHY HAVE A PLAN?**

Writing and adopting a party plan is a good idea for a host of reasons. First, just as in most other types of human endeavor, planning helps you avoid wasting time and money. Once you and your committee know what you are trying to accomplish and how you are going to do it, less effort is wasted on non-essential projects.

Second, a plan tells you what not to do. Just as a plan tells you what to do, it should also stop you from doing unwise or senseless things.

Third, a plan forces you and your organization to agree upon goals. Because you have to write your goals down and get them approved, important people in your operation can see what you're trying to do, and you can forge agreement on the direction of the party. Although painful at the time, this arbitration and consensus building will pay dividends in increased enthusiasm and responsibility. If everyone understands the direction of the party, there will be less need for constant supervision.

Fourth, a plan gives you a tool with which to handle dissension. Because the leaders of your operation have to sign off on the plan, they will have a greater stake in seeing that the plan succeeds. When parts of your organization attempt to strike off in other directions, you can remind them they are obligated to stick with the program.

Finally, a plan allows you to measure your progress. You can see what it is you've tried to accomplish, how much you've done, and what else remains. The plan assists you in setting deadlines and forcing people to meet them. It is a valuable management tool.

## **WRITING THE POLITICAL PLAN**

### **When should you write it?**

#### **Now!**

If you don't have a political plan, there's no time like the present to write one. Every organization (football team, large corporation, rifle squad, whatever) should have clearly defined goals and a plan to reach them. Almost all successful organizations have a plan and a strategy, and they stick to it. If you don't believe it, ask Toshiba, IBM, or the Boston Celtics.

If you are in the middle of a crisis, or the election is next month, adopt an interim plan to carry you through this period. Arrange to map out a plan during the off-season, or whenever you can catch your breath.

### **Who should help you write it?**

The people who will have to execute it.

A plan written by you and forced on your committee will probably not be read, not understood and certainly not executed.

Party workers are just like everyone else. They want their opinions considered, they want to be consulted and they want to be important to the process. Many times they have good ideas or know what projects have been tried before, and why they worked or didn't work. By opening the process to a wide group of people, you are casing your informational nets wide and at the same time building support for meeting the plan.

At the very least, the people who are going to raise the money to finance this plan need to be consulted. Your organization's volunteer recruiters should be involved as well.

When writing your local political plan be sure that it meshes with and reinforces the state party plan and the plans of local and statewide candidates. The success of your plan will be jeopardized if you strike out in directions contrary to the other GOP operations.

The state party or one or more campaigns may also be planning to perform some of the same activities you are, which means that they may be duplicating your efforts. Check with all of the groups you think might be operating in your area and make sure you are not performing work unnecessarily.

## **The Components of a Political Plan**

A local political plan can and should be broken down into bite-sized components.

In a perfect world a party political plan should contain the following items:

1. A local profile
2. Party goals
3. Major programs
4. Budget
5. Fundraising plan
6. Timeline

Your plan may not contain all of these, but you should consider each of the topics mentioned.

### **1. Local Profile**

Why do you need this? After all, you and your fellow Republican activists understand your area and ought to know what is politically significant and what isn't. The reason for writing this section of the plan is that there is often much information available about local politics, but very little agreement about what is significant. **Writing the local profile forces you and your committee to reach agreement on these points as well as many others.**

The local profile should be a summary of the demographic, political, and economic characteristics of your area. Who are the voters? How do they normally vote? where do your probable Republican voters live? What are the important things you know about your area that have an effect on local politics?

Here are some of the items you should consider including in the profile:

#### **a. Population Distribution**

Where do people live? Which towns or wards are bigger?  
Which areas are growing? What does the census say?

#### **b. Occupation & Income**

What do people do for a living? Who are the major employers? The major industries? Who has money and who doesn't?

**c. Ethnicity, Religion, and National Origin**

What are the major religious groups in the district? Where are the largest churches? From what region or country do people originate? What races are present? What languages are spoken besides English? What ethnic traditions, holidays, and festivals are observed?

**d. Media**

What kind of media covers your area? What television and radio stations do most people watch? What newspapers do most people read? Is the working press friendly or unfriendly, sophisticated or unsophisticated? Do the big media outlets pay attention to local politics? Are there other media outlets such that you can access?

**e. Election History & Registration**

What is the current registration breakdown in your town? What percentage of the vote will a typical GOP candidate receive? How many Democrats have been known to swing to the GOP side in a given election? How have GOP candidates fared in this area? Be sure to include vote data from the last three or four elections.

**f. Party Affiliation and Status of Elected Local Officials**

Which elected officials are Republicans and when are they up for reelection? How many positions will be up for election in the coming year? What are the relative strengths and weaknesses of both our incumbents and Democrat incumbents?

**2. Party Goals**

The second step in developing a political plan is to establish goals. In its most basic form, a political plan is simply a statement of goals and how you hope to achieve them.

Even if you don't write a political plan, it's a good idea to outline the goals of your organization and put them on paper.

You need to establish goals that reflect the resources available to you. While it is important to be ambitious, it is also important to be realistic. At best, you will feel pretty silly if the party has a great year and makes major strides forward, but you don't reach any of your goals. At worst, unrealistic goals will discourage your workers and breed gloom among your volunteers.

Remember that progress in politics is relative. If you do better this year than last, the GOP and your town will be better off. Just as a five degree course change in the direction of an ocean liner will be almost imperceptible to the crew, by the time you reach the other side of the ocean, that small change will mean hundreds of miles.

It is vital that you define success in your goals. Success for your organization is not only a function of what you would like to become, but where you have been. For instance, electing one additional member to the Town Council this year may not give the GOP control of that body, but it could be a major step towards future control.

Finally, it is important that you remember that elections are why political parties exist. All your efforts must, in the short or long term, be measured by your organization's ability to maximize the Republican vote in your area.

Here again, success is relative. Your goal may be to win 40 percent of the vote in some areas, an improvement over last year. That's fine if the difference between receiving 40 percent and getting 35 percent in those precincts is the margin a Republican candidate needs to win in his/her district.

To make the process of goal setting simpler, you can divide your party goals into three categories: party maintenance, party building, and electoral success. Although the three go hand in glove, they are different and occasionally mutually exclusive. Again, by reaching agreement on paper in this plan, you force your local party to face these choices and make decisions.

Here are some of the major considerations:

a. Party Building

What are your goals regarding Republican involvement and visibility in your area? What are your goals regarding GOP registration and/or affiliation? What ethnic, social, or other demographic groups are you going to target for inclusion into the Republican party?  
more voters

What will you do to improve the political environment in your area so that will feel at home in the GOP?

b. Party Maintenance

What are your goals regarding party activities such as conventions, monthly meetings, etc.? Are your bylaws and written procedures in line with state law and state GOP rules? What about training programs and headquarters operations? What are you going to do to get more people involved as volunteers and as hard-core workers?

c. Electoral Goals

It's not enough to say our goal is to beat all the Democrats and win all the elections. Which races have a priority? What criteria will you use to decide where financial assistance will be given? What programs will be undertaken by the party to assist candidates? What will the party do to assist candidates at each level? What about candidate recruitment?

### 3. Major Programs

Now that you have set the goals of your party organization, the next step is to outline the tactics and major programs you will use to attain them. Because every party committee has different goals, the programs you will use to implement these programs will vary.

As a local party organization your biggest, most expensive program may be the services you plan to offer candidates running in your area. Will you actually run the campaigns, including paid media, for your candidates, or will you only perform activities that will encourage Republican voters to get out and vote? The answers to these and similar questions will lead you to decide what programs you need to implement.

Here's a listing of some of the programs you might want to consider. A discussion of many of these is contained in other chapters of this manual.

- a. Voter registration.
- b. Voter identification phone banks.
- c. Forming a recruitment committee.
- d. Fundraising dinners for local candidates.
- e. Forming a finance committee.
- f. Party slate mailings.

- g. Forming a Teenage Republican Club.
- h. Precinct leaders training conference.
- i. Candidate's night for primary candidates.
- j. Building a candidate contribution fund.
- k. Ballot integrity.
- l. Survey research.
- m. Absentee ballot mailing.
- n. Get-out-the-vote activities

The only limit to this list is your imagination and your organization's resources. Remember, you can't do everything you would like to do, and some tough decisions will have to be made. In politics it is usually better to do a few things well than many things badly.

A good method for making these tough decisions is to list all of the programs your committee has performed in the past. Then make a list of the new programs you would like to try.

The next step is to attempt to put these projects in some kind of priority. One way is to have each of the people working with you on the plan vote for his or her top three. Count up the votes for each program for an initial ranking. Have people in the group defend their decisions, and if necessary, vote again. One way to break deadlocks is to have people also vote on the two least important projects, and lop off the "losers" from your list.

The bottom line is that you must put your programs in order of priority. This ensures you have the commitment and resources to fulfill your goals.

#### 4. Budget

**The expenditure budget should be a financial picture of the political plan. Without an accurate budget, the plan has no flesh on its bones.**

The budget represents the cost of performing the activities outlined in the plan. Include in the budget any money designated for candidate support, party building, overhead, etc. Be sure to include the cost of raising the money. When your budget is complete, prepare a cash-flow chart to guide your fundraising activities. If you know when the money must be spent, you will know the deadlines your finance committee must meet to raise the needed funds.

Again, be sure to coordinate with the state party and any other campaign or candidate organizations to avoid duplication of effort. There is no reason to spend money someone else will spend for you. There may also be ways you can use the state party's facilities or programs to save money.

On the following pages is a checklist of things for which you might need to budget.

**Administrative Operations**

Headquarters expenses	\$ _____
Headquarters rent	\$ _____
P.O. Box rent	\$ _____
Typing services	\$ _____
Word processing equipment	\$ _____
Bulk mail permit	\$ _____
Phones	\$ _____
Utilities	\$ _____
Insurance	\$ _____
Salaries	\$ _____
Office Supplies	\$ _____
Consulting services	\$ _____
Temporary services	\$ _____
Furniture	\$ _____
Janitorial services	\$ _____
Postage	\$ _____
Misc.	\$ _____
Salary expenses	
Payroll	\$ _____
Payroll taxes	\$ _____
Reimbursable expenses	\$ _____
Officer expenses	
Reimbursable expenses	\$ _____
Auxiliaries/volunteers	
Teenage Republicans	\$ _____
Young Republicans	\$ _____
NFRW Clubs	\$ _____
College Republicans	\$ _____
Volunteer awards	\$ _____
Volunteer dinner	\$ _____
Total Administrative Budget	\$ _____

**Political Programs**

Development programs

Events (pct. leaders, etc.) \$ \_\_\_\_\_

Mailings \$ \_\_\_\_\_

List acquisition \$ \_\_\_\_\_

Election Programs

Voter list development \$ \_\_\_\_\_

Voter identification phoning \$ \_\_\_\_\_

GOTV phoning \$ \_\_\_\_\_

Candidate assistance \$ \_\_\_\_\_

    Training seminars \$ \_\_\_\_\_

    Cash contributions \$ \_\_\_\_\_

    In-kind contributions \$ \_\_\_\_\_

    Independent expenditures \$ \_\_\_\_\_

Ballot integrity programs

Absentee ballot program \$ \_\_\_\_\_

Training seminars \$ \_\_\_\_\_

Total Political Programs Budget \$ \_\_\_\_\_

**Communications programs**

Newsletter

Postage \$ \_\_\_\_\_

Layout/design \$ \_\_\_\_\_

Typesetting, etc. \$ \_\_\_\_\_

Advertising

Newspaper \$ \_\_\_\_\_

Radio \$ \_\_\_\_\_

Outdoor \$ \_\_\_\_\_

Posters, signs, etc. \$ \_\_\_\_\_

Programs & misc. \$ \_\_\_\_\_

Direct mail	
Slate card mailing	\$ _____
Special candidate mailings	\$ _____
Brochures & training materials	\$ _____
Earned media	
Letters to the Editor program	\$ _____
Media kits	\$ _____
Photography	\$ _____
 Total Communications Programs Budget	 \$ _____

**Research programs**

Research materials	\$ _____
Survey research (polling)	\$ _____
 Total Research Programs Budget	 \$ _____

**Finance Programs**

Membership costs	
Membership cards	\$ _____
Membership mailing	\$ _____
Membership banquet	\$ _____
 Direct mail program	
Prospect mailing	\$ _____
Donor mailing #1	\$ _____
Donor mailing #2	\$ _____
Donor mailing #3	\$ _____
Donor mailing #4	\$ _____
Donor mailing #5	\$ _____

Large givers program	
Materials	\$ _____
Finance Committee banquet	\$ _____
Pins	\$ _____
Certificates	\$ _____
Events	
Annual banquet	\$ _____
Lincoln Day dinner	\$ _____
Ham supper	\$ _____
Total Fundraising Budget	\$ _____

Summary

Administrative Operations	\$ _____
Political Programs	\$ _____
Communications Programs	\$ _____
Research Programs	\$ _____
Finance Programs	\$ _____
<b><u>TOTAL BUDGET</u></b>	<b>\$ _____</b>

## **5. Fundraising Plan**

Now that you have prepared the budget, you must decide how the money will be raised. If you don't have a finance chairman find one. The fundraising plan should be prepared with the help of your chairman and the other major money people in your operation. The finance plan should be workable, attainable and detailed.

(See the Fundraising section of this manual for more information about the various programs you may consider listing in the fundraising plan.)

## **6. Timeline or Calendar**

Put all of your activities on a calendar and, working back from events and deadlines, fill in the preparatory activities needed for each event. For instance, if you are hosting a fundraising dinner, write in the deadline for finding a chairman for the event, printing the tickets, renting the banquet hall, etc. If you do this for each major activity, you will be less likely to miss the deadlines.

Use the calendar to determine what activities should be completed by what dates. Break the plan into several bite-sized pieces, and recruit people to manage parts of the plan. By delegating authority and monitoring progress, you can insure the plan is implemented on time and on budget.

One easy means of setting up a timeline is to use Lotus 1-2-3 or a similar software program on your computer (assuming you have one) to do the job for you.

If you don't have access to a computer, you can do your own spreadsheets using a big piece of graph paper. Simply list the various categories of expenditures (like we did on the previous page) down the left side of the paper. Across the top of the paper write the names of the months in chronological order. Then take each line item. expenditure and figure out what month you'll have to pay the bill for that item, and write that amount under the appropriate month.

Some items will be one-shot affairs, like an absentee ballot mailing. Other items will be due each month, like the phone bill.

Total up your expenditures by month to see how much you will have to raise, and total up the numbers for each line item to make sure it all adds up. Invariably it won't the first time, and you will have to check your math. That is why pocket calculators were invented.

Do the same process for your fundraising budget. Then compare your expenditures to your fundraising timelines to insure that you have the money when you need it.

## **SUMMARY**

Remember:

**A plan is only as good as its implementation. It is your job to insure that this plan, once adopted and accepted by the key movers and shakers in your organization, is implemented.**

## Computer Data Bases

A top-notch voter database *enhanced with voter history* is a crucial tool in municipal elections where 35-40 percent turnout is the norm. Low turnout provides an opportunity for the campaign that is better at targeting likely voters, and can make up for disadvantages in voter registration. A well-designed database can make all aspects of voter-contact — direct mail, phone calls, door-to-door, ID'ing supporters and undecideds, GOTV — **much more effective.**

**The primary purpose of the database is to identify *habitual and likely voters.*** This shrinks the universe of people the campaign needs to communicate with, and allows a campaign to concentrate on contacting these people **more frequently** than other voters.

Personally, I suggest you build the database using Microsoft Access software, but other programs can be used. Ideally, the database should contain separate fields for each of the following items:

Field	Notes
Title	(optional) Mr / Ms
First Name	separating first and last names helps you household and personalize
Last Name	
Street Number	separating street # from street name facilitates walk sheets
Street name	
Address 2	if mailing address is different from street address; usually a PO Box
Town	you don't need a state field, as all will be CT
Zip	+four, if available
Home phone	these should be matched to names for habitual voters. This can be done easily and cheaply using a phone CD-Rom.
Party Registration	R, U, or D
Election history 1	'95 Municipal
Election history 2	'96 General (presidential)
Election history 3	'94 General (gubernatorial)

Your town or campaign committee will probably have to take a hard-copy printout of your computerized voter file to town hall and look at the original checklist from those elections. Mark on your printout those people who turned out, and then go back and enter this information on your database with an “X”. This process will take time, so start **now**.

People who end up with three Xs are ***habitual*** voters; they turn out pretty much no matter what. Those with two Xs or one X are also ***likely*** voters. The campaign should concentrate on this universe with all its might: lotsa mail, phone calls, and prioritized personal door-to-door visits by the candidate. For example, you might want to do one mailing to all registered Republicans and Unaffiliates, but two additional mailings to those R’s and U’s who actually turned out in the 1995 municipal election. When you do doors, you will want to start with just those homes of habitual municipal voters, and if you have time (not likely), go back and hit the others later.

If they don’t have any Xs, they are not likely voters. Except for your broadest mailings (say, to all registered Republicans), the campaign has absolutely **no** interest in these non-voters. Don’t mail them, don’t call them, don’t lit drop them, don’t knock on their doors. Forget ’em — and invest the time and money you would have spent contacting them to work on your likely voters.

Creating your database in this way will also allow you to segment and household the universe of citizens living in your town and give you the piece counts crucial to accurate advance planning and budgeting.

## LOCAL PARTY PLAN GOAL CHECKLIST

### **Party Building**

1. Voter registration?
2. Teenage Republicans?
3. College Republicans?
4. Young Republicans?
5. National Federation of Republican Women clubs?
6. Membership drive?
7. Letters to the Editor program?
8. Advertising?
9. Outreach programs?

### **Party Maintenance**

1. Bylaws?
2. Mass meetings/conventions?
3. Headquarters?
4. Staff?
5. Monthly meetings?
6. Annual meeting?
7. Fundraising
  - a. Major donor programs?
  - b. Direct mail?
  - c. Fundraising events?
  - d. Finance Committee?
8. Communications?

- a. Party newsletter?
- b. Leadership memo?
- c. Media kits?
- d. News releases?

## **Electoral Goals**

### Candidate Recruitment

1. Target races?
2. Candidate recruitment committee?

### Candidate assistance

1. Monetary contributions to candidates?
2. Get-out-the-vote (GOTV) operations
3. Candidate training seminars?
4. List development?
5. Make volunteer lists available?
6. Make contributor lists available?
7. Opposition research?
8. Survey research?

### Election activities

1. Election day activities?
2. Campaign mailings?
3. Voter identification phone bank?
4. Voter registration?
5. Precinct targeting?

6. Ballot integrity?
7. Appointment of election officials?
8. Door-to-door canvassing?
9. Tabloid/literature distribution?
10. Slate card mailing?
11. Absentee ballot programs?











## Phone Banks

An essential part of executing a successful campaign effort is the use of a phone bank, manned preferably by volunteers and, if needed (and can be afforded), paid phoners. A functioning, on-going phone bank can be especially useful in the following instances:

- 1) Voter identification
- 2) Volunteer building
- 3) Voter registration
- 4) Fundraising
- 5) Advocacy calls
- 6) Inoculate against opponent 'hit' calls
- 7) Get-cut-the-vote on election day

A summary of each of these activities is found on the following pages. But first:

### *Setting Up An "In-House" Phone Bank*

While the ideal setting for a phone bank is having it located under one roof (preferably as part of the town committee office), in most cases, the phone bank effort will be comprised of a number of locations such as doctor's, dentist's, insurance, attorney's, or other offices where a block of telephones can be found.

Care should be given to make sure that each location is properly supervised so that calls and results are accurate. The main phone bank supervisor should be someone who can give full attention to the phone bank.

It is wise to over-staff your phone banks since, with volunteers, you have a higher amount of no shows and often people come late and leave early. You can have other projects going in the office to keep reserve phoners busy until they are needed.

*Paid vs. Volunteer Phoners*

Along with the cost of equipment and service comes the expense of wages if you cannot staff the phone bank completely with volunteers. Every effort should be made to use volunteers instead of paid phoners. Aside from the expense of paid phoners, the more volunteer phoners you have the more committed your volunteers become.

You can demand more from paid phoners because they work for you, so in some respects you have more control over the quality of phoning done. Plus, paid phoners come in every day and become more proficient at phoning, versus volunteers who come in only once or intermittently and hence aren't quite as proficient.

### *Phone Cards and Lists*

Phoners should use pre-printed cards or lists which can be ordered from the list vendor maintaining your registered voter file. Ideally, you would have a card printed for each household of registered voters in the town. If you do not plan to call through to all registered voters in the town, you may wish to select just good voters to cut down on the numbers and cost.

The card or list should include the phone number, address, names of registered voters with corresponding registered voter number, and response codes which correspond to the phone script you use.

### *Voter Identification*

The first effort a town committee phone bank should undertake is the identification of voters in the district. This lays the ground work for most of the remaining campaign activities. Information that could be gathered include:

- \* Party ID
- Head-to-Head (one candidate vs. another)
- \* Prioritize selected issues by importance to voters
- Employment question (could mean identifying union vs. non-union, or employment status or type)

The call could be followed up with a personalized letter or other kind of mailing with a message tailored to the person ID'd.

You should avoid identifying the campaign until at least the end of the script, if at all. Disclosing the source of the call could affect the results. However, out of courtesy, you should disclose who you are calling for if the person requests it. (A good way to handle it is to tell them "I would be pleased to tell you at the end of the survey, but would prefer to wait until then so as not to bias the results.")

Remember that if the bulk of your calling is done during daytime, you will have more housewives answering which may affect your results. For instance, Linda Smith is more popular with women, so more daytime calling might show her stronger than she really is.

### *Volunteer Building*

The phone bank can be used to add to the number of volunteers by recruiting the supporters identified during the ID calls to help with a specific task like a doorbelling party, phoning, yard signs, fundraising events, etc.

It is best to use volunteers when making these calls since they can identify themselves as a volunteer making it easier to ask others to volunteer their time. The call could be followed up with a reminder note to increase turnout to the event.

### *Voter Registration*

Prior to voter registration deadlines, a "get supporters registered" phone committee should be implemented.

A script similar to the ID script would be used with an additional question asking the person. Everyone in the house is registered. Normally, you would only ask that of those who were supporters of your candidate. If there are non-registered voters, the call should be followed up with information on how to register or even an offering to send out a special assistant registrar associated with your town committee.

### *Fund-raising*

Calls to supporters and volunteers with a solicitation for money can be especially effective and can give the town committee a quick financial boost. The best phoners to use in a fundraising setting are your more experienced phoners. Realtors and insurance groups are particularly good at this activity because they are practiced in the persuasion process.

Each call should be followed up with a personalized letter confirming the person's pledge. A response card and envelope should be included with the letter. Of the calls completed, approximately 12% of prospecting calls (i.e. ID'd Republicans) and up to 30% of past donor calls will pledge a contribution.

Of those who pledge, approximately 75% will actually send a check in (when followed up with the reminder). An average gift will be approximately \$25.

### *Advocacy Calls*

Using the ID information done in earlier calls, voters can be contacted with specific messages of interest which may be common to the candidate and the voter. Your candidate's supporters may simply be contacted to confirm their support while undecided voters may be approached with a more persuasive message to try to sway their support.

Like other calls, advocacy calls should be followed up either with a personalized letter or other mailing which will reinforce the phone message.

### *Inoculate Against Opponent "Hit" Calls*

The phone bank provides a very quick medium for response to or inoculation against last-minute opponent "hit" calls or mailings. Messages to correct any damage done by the opponent can be delivered effectively and immediately by phoning.

### *Get-Out-The- Vote*

This is one of the most critical of all the tasks a phone bank takes on. All the previous work is done in vain if the people don't get to the polls to vote.

Phone calls are made to all your candidate's supporters reminding them to vote. Through a series of follow-up measures (see GOTV section of this manual) those who have not yet voted are contacted again and again until they finally vote.

# Door to Door Campaigning

Door to door campaigning brings voter contact to the personal level. While telephone banks may be the best way to tally voter identification and turnout, door to door campaigning effectively motivates voters. People remember this type of personal contact. One-on-one contact between the candidate and voter is one of the best ways to win a person's vote.

Door to door campaigning is a staple of state legislative and local campaigns. Because these races have a limited voter audience, hitting every door in the town is often doable. The candidate who is willing to pound the pavement and demonstrate his or her concern by meeting voters at their homes greatly improves his chances of winning. The candidate shows he has the fire to win and voters respect and respond to the personal contact.

Door to door activity is based on a neighborhood approach to street campaigning. A candidate goes to the voters as a neighbor, explains he's running for office and wins their support. This personal contact often can become the basis for a volunteer organization run by neighbors, their friends and family. Even today, where strong community identity is waning, door to door can still be useful to win voters' support.

A person is more apt to vote for someone based on the personal endorsement of a friend or person they respect. Personal endorsements can maximize door to door campaigning. For example, a candidate canvasses a neighborhood or community with an escort who personally knows the neighborhood or is a well-respected member of the community. The escort's personal endorsement paves the way toward increased support in the community for the candidate.

Door to door activity is effective even without a neighborhood escort because of the power of one-to-one contact with the voter. Although the candidate is often the most influential person in one-to-one contact, volunteers can have a strong impact by showing their support in canvassing a neighborhood. Volunteer door to door contact can create an impressive presence in the community and voters respond by wanting to join the bandwagon.

A door to door program serves several purposes within a campaign. First, this kind of program builds and reinforces the candidate's name identification. Door to door secures a tie with the voter that can only come from talking one-on-one. Second, it builds credibility for the candidate and his town committee. An effective door to door program shows that the candidate and his town committee have the ability to work at the grassroots level, to organize a volunteer force and to create a tangible presence in the community. Third, door to door contact helps the campaign organization identify and turn out favorable voters. Although telephone banks are more effective for locating favorable voters and getting them to the polls, door to door canvassing can be very effective in motivating the voter on a personal level. The personal contact involved in door to door campaigning can be a persuasive tool to motivate undecided voters to support a candidate as well as to secure the vote of a favorable supporter. Fourth, door to door canvassing can produce great organizational benefits such as locating volunteers, raising money, recruiting potential yard sign locations and neighborhood organizers.

### *Planning*

As with any effective voter contact program, door to door requires a plan. The key to door to door campaigning is organization. You have to have enough people with the right kind of organization to walk the targeted areas you'll need to win. Often it takes longer to walk all the targeted areas than anticipated. To avoid failure, start early and develop a realistic plan with a complete timetable.

There are numerous ways to conduct a door to door town committee, ranging from a volunteer-intensive effort covering the whole town to a candidate-oriented program that focuses on select areas. Effective door to door programs can be combined with other voter contact tactics such as direct mail and phone banks, to maximize the party's impact on targeted voters.

You should choose the method best suited to your town based on your overall plan and strategy. Each political situation is different, as is each town committee. Develop a strategy for your door to door program that maximizes your resources and the strengths of your candidate. Here are some basic questions to ask when developing a door to door strategy:

What are the main goals of your door to door program? Do you want to emphasize candidate contact in specific areas? Is it your main source for voter ID and turnout? Do you plan to use it only in specially targeted areas?

What is the geographical size of your town? Where are the strong and weak areas of support? Do you have the time and people to cover these areas effectively?

Should the strategy be to "hit" every household or targeted areas? Will you work from strength to weakness, i.e., Republican core to ticket-splitters? Or will door to door be designed to work the persuadable only, i.e., ticket-splitters?

Is the candidate good at one-to-one contact? What areas are critical for the candidate to cover in door to door activity? Is there enough time to cover these areas before the election?

Do you have the volunteer force to cover the areas not covered by the candidates? Can volunteers accompany the candidate as an escort in vital areas, preferably volunteers who know the neighborhood?

Do people expect a door to door program from your town committee? Will it be a new device? When was a door to door program last used in your area? Was it effective?

How many hits can you implement? Do you have enough time to visit known favorables more than once before election day? For example, should you start with Republican areas and end with a second visit to these Republican areas before election day to generate voter turnout?

Will your opponent go door to door? What methods will he use?

Once you've developed a door to door strategy, map out the strategy on a calendar that will serve as your timetable. Be sure to allocate time for training volunteers and allow for a few false starts. Specify which areas will be covered by the candidate and which areas will be covered by volunteers. Set deadlines and adhere to them. A plan is only as good as it's followed.

### *Door to Door System*

As mentioned before, there are numerous ways to conduct a door to door program. In its basic form, when a candidate or volunteer makes contact with a voter by a door to door visit, it's considered one "hit", or one completed voter contact.

The biggest selling point about door to door is the personal contact with the voter. A system that maximizes personal contact targeted toward special voters will make the overall door to door effort more effective. In other words, the more targeted "hits" to specific favorable and/or undecided voters you can work into your door to door system the better.

If resources are available, a system can be developed to maximize the number of "hits" accomplished by a door to door program. A system combining mailings to voters with door to door visits can "hit" a targeted voter's household seven times before election day. Here's a sample step-by-step outline of this system:

Hit #1: Pre-Walk Mailing. A postcard is sent to the registered voter's household notifying them that the candidate or volunteers will be visiting within a week.

Hit #2: Home Visit. Candidate or volunteer visits home, meets voter/voters and leaves literature. Information is collected about voter's support, concerns and needs.

Hit #3: Post-Walking Mailing. A postcard is sent to the voter, thanking them for the opportunity to meet the voter.

Hit #4: Post-Walk Letter. A letter is sent to the voter, addressing a special concern or general campaign theme and asking for their support on Election Day.

Hit #5: GOTV Mailing. A GOTV postcard is sent to the voter, urging them to vote for the candidate on election day. Times of voting and polling place locations are listed. Campaign number is given for assistance in getting to the polls or working on election day.

This type of system requires substantial organization. A timetable needs to be constructed allowing enough time for the mailings, the home visits, follow-up and GOTV mailings. A campaign must be well-organized to send the proper mailings to the right voters. Volunteers need to be well trained to cover lots of ground and gather pertinent material on each voter and leave a positive impression.

A five-hit door to door program like this can persuade an undecided voter to support a candidate. Because the voter's concerns are addressed, he is made to feel vital to the campaign and political process. Favorable voters can be turned into volunteers and contributors through this type of program.

This program can be augmented to maximize "hits" to priority voters through coordination with a phone bank. In addition to pre-walk and post-walk mailings, voters can be contacted by phone to notify them of the candidate's or volunteer's visit, ask for their support, ask for contributions of time and/or money and relay voting information.

It's important to keep track of how many direct contacts the campaign has with any one voter through a door to door system that's augmented by direct mail and phone banks. Your great efforts to run a well-oiled system can fail if you don't keep the impact on the voters at the forefront of your mind.

Look at the effort from the voter's point of view. He'll be impressed if he receives mail, a visit and phone call that work off each other and are well-timed to coordinate. But, he'll be annoyed if the campaign randomly sends him mail, or volunteers contact him and call him without any mention or use of the other contacts. This displays disorganization rather than organization.

### *List Development*

Before you can begin any door to door activity, you need good voter lists. Door to door campaigning requires a list of registered voters, organized by street order for each precinct. You'll want to find the most current list of registered voters for your district complete with the following basic information:

- Voter's name
- Voter's address, complete with street address and zip code
- Precinct
- Party registration

### *Walk Preparation*

Once you have a door to door plan, strategy, and good walk lists, you can prepare for the walk program to take place. Here are some steps to guide you in your walk preparation:

### *Chart Precinct Priorities and Timetable on a District Map*

This will help determine the physical realities of location and time constraints of the door to door plan. The door to door district map will provide a graphic illustration of where and when to send your walkers and/or candidate to canvass the district.

### *Divide the Walk Program Into Phases of Attack With Deadlines*

For example, the first phase may be to cover the top three priority precincts within a two week period. These phases set milestones to reach for the success of the overall program. If possible, assign each phase to a volunteer director who will organize walkers to complete that phase. Once the program gets rolling, you can have several precincts being walked simultaneously, provided you have the manpower.

### *Determine the Number of Walkers Needed to Complete Each Phase of the Walk Program*

You'll most likely begin with a small core of walkers to start the program. Soon, it will become evident more walkers are needed to cover the territory. Recruitment of walkers will need to be an ongoing program.

### *Develop Program Materials*

Decide what materials you'll need for the walkers and any accompanying direct mail effort. For a typical walk program, walkers are equipped with the following packet of materials:

- A street map of the canvassing area
- A name badge to identify the walker and campaign
- Voter lists or cards organized by street order with a few questions to ask the voter
- Literature on the candidate, such as a campaign brochure or flier
- Campaign literature marked “Sorry I Missed You” for voters not at home
- Volunteer cards
- Absentee ballot instructions
- Polling place information
- A reference sheet of instructions for the walkers

As mentioned before, direct mail efforts can maximize the impact of a door to door program. At the very least, if your campaign has the time and money, send mailings before and after each door to door “hit”. An easy, inexpensive way to send these pre-walk and post-walk mailings is by using a postcard with the campaign logo on the front and a simple message on the back of the card.

Keep all the materials designed for the door to door program simple. Type size for all printed materials should be large and easy to read. The layout should be simply and uncluttered. Be sure the materials convey your campaign message simply and clearly.

## VOTER REGISTRATION

It is a fact that Republicans are out registered in the State of Connecticut. Voter registration programs in place throughout the year are one way for Republicans to gain the ground we've lost. **Please note: Contact your local Registrar of Voters for legal requirements since state laws tend to change year to year.**

When conducting voter registration drives, or talking to those who are newly eligible to vote, make sure you are talking to those who will not register Democrat.

Now that you have your targeting done, and you know where the most Republican and swing votes are likely to be, it is best to keep your voter registration efforts limited to those areas most likely to be favorable to you.

To conduct an effective voter registration effort, you should have a list of registered voters, listed by street, if possible. This makes door-to-door registration much easier to accomplish. Your voter registration effort should be carefully planned, because under the law, only certain people are allowed to register others to vote, and legal notice of your plans to conduct a voter registration effort is required.

While there are about ten different ways to register to vote in Connecticut, only three will probably be used by your town committee. These are door-to-door registration, special registration sessions using both the traditional registrars and/or mail in registrations, and registration at town hall.

Members of your voter registration committee should keep an eye on local real estate transactions in the newspapers and a letter should be sent from the town chairman, or a state representative or state senator, to any persons new to the area encouraging them to register to vote, and encouraging them to register Republican.

Committee members should also work to register newly eligible voters, those turning 18. Usually it is difficult to get a list of those about to turn 18, so obtaining a list of all high school seniors is probably your best bet. Send each of these seniors a letter encouraging them to register when eligible and asking them to register Republican.

You should maintain contact with your registrar of voters to check to see if the people to whom you've sent letters have registered. If they haven't, a follow-up phone call offering your assistance or reminding them may help.

## Ways to Register

Work closely with your town registrar of voters to make sure you meet the proper deadline for voter registration. Different deadlines apply to different elections. If you have other questions, please feel free to contact state headquarters.

**At Town Hall:** Individuals go to town or city hall on their own and register to vote. Many individuals will not take the initiative and time off work to visit town hall. Only the most civic minded or party-loyal will do so. You should get a list from the registrar of anyone who has recently registered Republican or Independent and send them information about your town committee and about ways they can get involved in the Republican party.

**Door-to-Door Registration:** Only a registrar of voters, deputy registrar, assistant registrar and special assistant registrars are allowed to register other people to vote. This type of registration can take place at any time except between the registration deadline and the day after an election. Written notice of the place, date and time of the door-to-door registration must be given to the other registrar of voters five days in advance.

**Special Registration Sessions:** These types of registration sessions vary from community to community. However, state law requires mandatory voter registration sessions prior to primaries and elections, including Saturdays and evening hours. Check with your registrar about any plans for this type of voter registration.

**Mail-in Registrations:** A mail-in application can be used to register. However, it must be witnessed by a town clerk, a notary public, a commissioner of the Superior Court, Justice of the Peace, assistant town clerk, or a registrar, assistant registrar, and special assistant registrar. These mail-in applications are useful when conducting a voter registration drive in a public location where many cross-town registrations are expected. Again, check with your registrar for proper forms, procedures and notification.

Of course, those newly registered Republicans should be contacted by your town committee, either by phone or mail, to encourage them to become active in local Republican activities. Many times, these new Republicans, or those new to the area, are interested in getting involved in the community. This is one way to do so. It is also a good way of recruiting new members for the town committee and a larger volunteer base come election time.

## ABSENTEE BALLOTS

Absentee voting has become a crucial factor in many elections. As a result, many town committees are making absentee voting programs a priority. With planning, you can increase the Republican turnout by assisting GOP oriented voters in casting absentee ballots.

Under Connecticut law a voter is allowed to vote by absentee ballot if he is unable to appear at his polling place **during all of the hours of voting** (6:00 a.m. to 8:00 p.m.) for one or more of the following reasons:

- 1.) Active service in the armed forces of the United States;
- 2.) Absence from the town of his voting residence during all hours of voting;
- 3.) Illness;
- 4.) Physical Disability;
- 5.) The tenets of the elector's religion forbid secular activity on the day of the election, primary or referendum;
- 6.) Service as an election official at a polling place other than his own.

### CREATING AN ABSENTEE BALLOT PROGRAM

Consider appointing an absentee ballot chairman for your area. A proper absentee ballot program will require time, attention to detail, special knowledge of the law and volunteer support. It might be best to put a good volunteer in charge of the project so that the program does not get lost between the cracks.

Every absentee ballot program consists of five steps:

1. Crafting your program to fit the election law;
2. Obtaining a list of potential absentee voters;
3. Pre-selection of voters or determining for whom these people will vote;
4. Putting absentee ballot information or ballot request forms into the hands of selected potential absentee voters;
5. Follow up work to insure that the absentee ballots are cast;

## **Step One**

One way to insure a successful absentee ballot program is by targeting potential absentee voters.

- If you can, obtain a list of people who have voted absentee in the past. These voters are much more likely to vote absentee than other voters. This information is on file in the Town Clerk's office.
- Look at the last election and discern which precincts have had a large number of absentee voters in the past.
- Senior citizens vote absentee in large numbers. Locate seniors through nursing home directories, senior citizen housing developments, etc.
- College students many times vote absentee, but this is a hard group to locate.
- Businessmen and women are the among the most common voters who are out of town on election day.

## **Step Two**

If possible, it would help to know for whom the potential absentee voter will cast his ballot before you expend precious resources in getting him or her a ballot.

As Americans we think everyone should vote, and we encourage them to do so. However, the resources of the GOP and your organization are limited, so we can only spend our time and money toward insuring that all GOP ballots are cast.

There are any number of ways to determine the leanings of potential absentee voters. If you are running a voter identification phone bank you can kill two birds with one stone by asking favorable voters if they need an absentee ballot. The same thing can be done through your door-to-door canvass.

You can also call the list of people who have requested ballots and ask them their preference.

### **Step Three**

Mail or hand-deliver an absentee ballot application to every GOP voter who needs one. You can do this by mailings to people located through your canvass or phone voter identification program.

If your committee has the resources, you can mail all registered GOP voters absentee ballot information as part of your normal voter persuasion efforts.

### **Step Four**

A party organization often does an outstanding job identifying, locating and contacting potential absentee voters, but fails to aggressively follow up on their efforts.

A great many absentee ballots that are requested are never completed and returned. Your organization must follow up and insure these ballots are cast.

Maintain a list of names, addresses and phone numbers of everyone you have located who wants an absentee ballot. Send them reminder letters, call them or even visit them to ensure the ballots are returned on time and in the proper form.

Again, check with the Republican campaigns that will be operating in your area. If they have an absentee program, find out how your group can cooperate with theirs to save money and time.

In the last few years a number of elections have been decided by the absentee vote. Make sure that when the absentee vote is counted, that your candidates get a boost from the results.

# GET-OUT-THE-VOTE

Get-Out-The-Vote (GOTV) is a uniquely crucial part of your voter contact program. We Republicans cannot win elections if our supporters do not vote. Conversely, Republicans have won elections time and again because our voters cast their ballots at a greater rate than did the Democrats.

When planning a GOTV effort you must first develop the list of names to be contacted and urged to vote.

## **Deciding Your GOTV Targets**

Naturally, your voter canvass — either by phone or on foot — is the best source for these names. In the course of the campaign your workers will find every voter they possibly can favorable to your GOP candidates. These are the targets of your GOTV efforts.

Some thought needs to be given to this program before you begin. In many communities several GOP candidates may be on the ballot at the same time. Do you only target straight GOP voters, or are you going to turn out people who are supporting three out of your four candidates? What races have priority? If the potential voter is supporting our candidate for president, but not our candidate for sheriff, do we target him for GOTV or not?

An acceptable compromise may be for your operation to make GOTV calls to voters favorable to your candidates who are in close races, and give the list of voters favorable to other GOP candidates to their campaigns. The other GOP candidates will benefit from the information you have collected and can develop their own GOTV program.

Set your guidelines for GOTV before you begin your canvassing. Make sure all the candidates involved know what your priorities are. They may not like it, but you owe it to them to tell them what you are doing.

Sometimes a local or state campaign will locate more favorables than they can handle. If you have the capacity, you might offer to call the supporters they would not otherwise be able to turn out.

Other GOTV targets might be registered Republicans or GOP primary voters. Lacking a voter identification program, you can still bet that these voters will favor our candidates more often than not. Many local parties concentrate all their efforts on these two groups.

### Preparing For Election Day

A first big step is to put your list of favorables into a format you can use for your GOTV efforts. Try to get a computer to do this for you. Print out your lists of favorables with their phone numbers on a printout that has up to 30 households per sheet. The computer selection can also be done to run the lists in street list order.

Develop some method so that callers know who to call and who to ignore. For example, use a yellow marker to highlight those names you want to turn out. You also want to be able to clearly mark the names of people you have made a GOTV call to, in case you want to make another call.

### GOTV Phone Calls

The theory behind GOTV phone calls is that a reminder call on or before election day will improve GOP turnout. Various GOP groups have tested this theory and have discovered that calls like these can improve GOP voter turnout by as much as 10%.

Before you can figure out how many people you need for election day, you must figure out how many calls must be made and the number of phones that will be needed.

1. Project the number of favorable voters you will want to call.
2. Multiply this number by two figuring that at least two calls will be made per household. If you have the resources, you may want to call each favorable household once on either Saturday, Sunday or Monday, and then again on Election Day.
3. Figure out over what period of time the calls will be made. Studies show that reminder calls are just as effective on Monday night as they are on election day, if not more so. Sunday calling has also proven to be effective.
4. Figure out how many phones you can scrounge up and what hours you can call. For GOTV calls, figure that your callers can make 30-35 completed calls per hour (usually a higher number of completed calls per hour than in your voter identification calls). Simply divide the number of calls you want to make by the number of hours you will be calling, and divide that number by the number of calls you feel you can make each hour per phone.

Example: Assume you have identified 10,000 favorable households. You want to start your calling on Sunday and finish the first calls by Monday night. On Election Day you will call everyone two more times.

You decide to call Sunday from 2 until 9 p.m. (7 hours). You will also run your phone bank for three hours Monday night for total of 10 hours. 10,000 divided by 10 hours is 1,000. Divide that number by 35 calls per phone per hour, and you need 29 phones for Sunday and Monday night.

The polls open at 7 a.m. and close at 7 p.m. You probably cannot start calling any earlier than 8:30 a.m. and will stop calling at 6:30 p.m. That gives you 9 and 1/2 hours of calling time on Election Day. Since you want to call each number twice, you will need nearly double the phones you had in operation over the weekend.

$$10,000/10 \text{ hours} = 1,000 \times 2 \text{ calls} = 2,000$$

$$2,000/35 \text{ calls per hour} = 57 \text{ phones!}$$

A common failing of many voter identification programs is neglecting to recruit enough people and/or phones for the GOTV phase. It takes a lot of phones. Most organizations have to supplement their phone banks with business locations. Large towns sometimes have to establish four or five phone banks at separate locations, which makes coordination a nightmare. One campaign in 1988 even rented motel rooms so they could use the phones in the rooms!

Remember, most businesses are open on Monday and election day, which means you will not be able to use them during business hours. The good news is that most businesses are closed on Sunday, a good time to make your GOTV calls.

If you have to establish satellite phone banks, be sure to recruit someone to run each phone bank. Also see that they are supplied with:

- Enough cards or printouts so that they have enough phone numbers to call.
- Name & phone number of someone to call in case of emergency.
- Name & phone numbers of the scheduled volunteers.
- Instructions on how to run the phone bank.
- List of polling places.
- Biographical information on the candidate(s)
- Copies of the GOTV script.

## **GOTV Mailings**

Mailings are another method of GOTV. However, be careful about postal delivery. Even the best post offices sometimes deliver mail a day or two late. With GOTV mail, a late mailing is wasted money and possibly an election lost.

GOTV mailings are expensive and possibly time consuming. You have to collect the names of the favorables from your phone bank and address your mail off that data. Unless you are using a computerized system, this is a tedious and labor-intensive process. If you have a choice between mailing and phoning, you might want to give priority to the phones.

Still if you have the time and the resources, a GOTV mailing might supply that extra push you need to get your voters out. A combination of GOTV mail and GOTV phoning will doubly insure the favorable voter turns out on election day.

Most GOTV mail is in postcard format. The message is simple and direct. Tell folks to go vote and tell them why. Make sure the mail gets to people in time to do some good.

## **Sound Trucks**

Although outlawed in many cities, sound trucks are effective in some types of neighborhoods. If you contemplate their use, check with your local law enforcement officials first. Also make sure you do not blast out your messages near the hospital or cause heart attacks at the senior citizen center. Check with the locals before you run a sound truck through a neighborhood. You could lose more votes than you gain if you are not careful.

Sound trucks are not much in demand these days and are therefore somewhat scarce, so plan this activity long in advance.

## **Rides to the Polls**

A traditional activity for many local parties is providing transportation to the polls. This can be very effective, and even more productive if linked with the phone bank.

In the past, the biggest drawback to this program was the agonizing slowness with which it functioned. Drivers would take one voter to the polls, then have to return to HQ or call in from a pay phone to get their next customer. Today, with the proliferation of car phones, you should be able to find enough "wired" cars to make this program work effectively.

# BALLOT INTEGRITY

If your operation does nothing else, you must do everything in your power to see that no properly registered Republican is disenfranchised either before or on election day and that only registered voters actually vote.

No other organization is better situated or more credentialed than the local representatives of the Republican Party. You and your committee speak for hundreds, perhaps thousands, of people in your community. You have a right under the Constitution of the United States to have your voice heard on election day.

## **Types of voter fraud**

To prevent election day fraud you must first learn to recognize the most common types of vote fraud. Here is a listing of the most prevalent types of election shenanigans:

Illegal assistance. Under the pretense of assisting a voter who is blind, disabled or illiterate, an election official accompanies the voter into the polling booth and casts the voter's ballot.

Multiple voting. "Ghost" voters roam from precinct to precinct assuming the names of people who have died, moved or have not shown up to vote.

Illegal electioneering. It is illegal to campaign within seventy-five feet of a polling place. It is illegal for election officials to promote a political party or candidate inside the polling place.

Fraudulent counts. Election officials count the ballots incorrectly, or read the numbers off the voting machine incorrectly. **This is where most honest mistakes are made as well.**

Bribes. Crooked politicians pay people for their votes.

The only limit to the variety of fraudulent election practices is imagination and cupidity.

# RESEARCH

## DEVELOPING A RESEARCH PROGRAM

Research is a key function of a local political party. Good research provides the foundation for a viable plan, allows you to define goals, allocate resources, and make crucial decisions.

Research conducted by the local party helps avoid the problem of reinventing the wheel every two years. Ideally, the party serves as an ongoing repository of information pulled together from multiple sources. This pool of expertise can then be shared with Republican newcomers, office-holders, and opinion leaders in your area.

With a good understanding of your town and its voters, the issues important to your area, and a thorough knowledge of the candidates running for office, you will be in a position to provide a clear view on a sometimes blurry political landscape. You will also be able to develop a solid basis for fundraising, voter programs, speech writing, and candidate recruitment.

A good research program takes a great deal of time and effort. It is easy to collect and catalog information, but the trick comes when you want to use this information in a speech, a plan, or a meeting. The research system you develop should be accessible and organized enough so that you and others can use it, but secure to prevent misuse.

**Get Organized.** If you did not inherit a good filing system, start one. You will need to be able to find information fast, and update it continually. Although a computer is an invaluable tool to the effort, full files and crowded bookshelves are proven tools of the trade.

**Research** is an excellent way to get people involved and working for the party. There is a lot of substantive work to be done. A researcher need only be a hard worker with an eye for detail and commitment to accuracy. Volunteers can either be experts in their field or high school students.

The tasks range from writing issue briefs to collecting election results. Asking people to help is flattering and they will enjoy contributing to your effort.

Used properly, research can be incredibly effective. **The key to good research is accuracy. Accuracy is not just important, it is essential for good research.** You will need to check and double check your sources, facts, and figures. Used improperly, research can hurt you and your organization. Nothing is more damaging than inaccurate or out of date research. However, if you understand what you are doing and what you need to accomplish from the beginning, good research will open doors and make other tasks much easier.

An extensive research program includes information in five areas:

DEMOGRAPHICS  
VOTE HISTORY  
ISSUES  
CANDIDATE RESEARCH  
POLLING

Although many organizations will not conduct polling, or survey research, most will benefit from some exposure to information derived from surveys. Following is a summary of each of these areas of research, elements and sources to explore, and some tips to help you incorporate as many aspects as are practical for your organization. You will need to assess your resources and needs to decide for yourself which aspects you will incorporate into your local party research program.

## DEMOGRAPHICS

Imagine having to run a corporation without knowing what raw materials will cost, if the local work force has the skills to make your product, or even whether anyone would buy it. Without basic information such as this, it is difficult to run a business or undertake a political effort. Likewise, you will need to understand your town and its voters in order to develop and implement a political plan.

Demographic research is the first step in determining the basic characteristics of your town or district. For even the experienced town chairman, there is a lot to learn about your town. Do not assume you know everything there is to know about your area. Get the facts, analyze the figures and then test what you already know against what the statistics are telling you.

By compiling the following basic demographic information, you will be able to begin to write a comprehensive town profile. While much of this information may seem very basic, it is important to accumulate it for your local GOP candidates, especially those running for the first time.

The Research Checklist at the end of this section is a good way to check your thoroughness in compiling and knowing the demographics and intricacies of your area.

### **Geographic Information**

Collect your town maps showing precincts, wards, city boundaries, congressional districts, state legislative districts, school and water districts, plus other significant governmental districts.

List the total number of precincts in your town, as well as the total number in each town and district.

Figure out what percentage contribution your town vote makes to each state house and senate district, other local offices, and to statewide office vote totals.

Knowing where the precinct and election district lines are drawn and which officials your town elects are important first steps in understanding the intricacies of local politics.

### **Population Data**

Statistics describing the population will help you understand the differences between one area and the next in a certain district, or what makes your town unique within the state.

This data is critical to your planning. Without knowing how senior citizens, single women, children, etc. live in your town and where, you cannot fully understand what people care about or how they may otherwise impact the overall strategy of a campaign in your town.

Larger campaigns and GOP organizations often derive this information from survey results. However, because you will be responsible for a relatively small area, you need to look into smaller units of data only available from the U.S. Bureau of Census.

The Census Bureau collects and tabulates actual population numbers, making it the most widely used data for statistical purposes. The units analyzed by the census are, among others: states, counties, SMSA's (Standard Metropolitan Statistical Areas), cities, tracts, enumeration districts (non-tracked land) block groups, and individual blocks.

The census provides exact population statistics every 10 years and publishes official estimates yearly. Figures available through the census include:

Population  
Race  
Age  
Sex  
Income  
Ethnicity  
Homeowners / Renters Families / Singles Education level  
Occupation

**Where to Get Census Data:**

- Bureau of the Census. Suitland, Maryland. (301) 7637662.
- State Census Data Center in the Office of Policy and Management.
- The Republican National Committee in Washington, D.C.
- Any library that is an official “government depository”. By law, every Congressional district has at least one.

**Economic Data**

Information regarding the economic climate and business environment in your town and state can be extremely useful.

Is your town or district falling behind the rest of the state? Are you enjoying the benefits of your federal tax dollars in the form of measurable services? Are small businesses succeeding more often than failing in your area? Is income on the rise?

Various sources of economic data can answer these questions for you. This information is available from dozens of different sources, and it is available in various forms (books, computer programs, data networks, etc.).

The Census Bureau publishes the City and County Data Book where you will find vital statistics for economic trends as well as other important information at the town and city level. This publication is available through the Government Printing Office (GPO) and the U.S. Department of Commerce and can probably be found at your local library.

Contact the state Labor Department or the Office of State Planning for more information regarding:

- Employment/Unemployment
- Taxes: federal, state and local amounts paid
- Spending: By federal, state and local governments for education, roads, DOD contracts, and other programs
- Business start-ups and failures
- Town bond ratings

### **Education Statistics**

The National Center for Education Statistics within the U.S. Department of Education publishes state by state data about education. The Digest of Education Statistics is available through the Education Department and the Government Printing Office, both in Washington, D.C. and can probably be found at your local library.

For additional statistics that you can use to grasp a better understanding about education in your town and state and the condition of schools in your area, tap your local or state Board of Education for statistics about:

- School SAT test scores and rankings, graduation rates
- Teachers: Student ratios and pay
- Education funding and from what sources
- School closures
- Day care

## **Crime Statistics**

The FBI publishes a crime statistics book analyzing metropolitan area reported crime rates. The title of the book is Crime in the United States (Uniform Crime Reports). It is available through the Government Printing Office in Washington, D.C. and your local library.

## **VOTE HISTORY**

Just as it is important to know who lives in your town, you must also know how they vote. Through the collection and analysis of registration figures and election returns, you will be able to determine how the voters in your district tend to behave politically. With this knowledge your ability to make resource allocation decisions (target) is greatly enhanced.

## **Targeting**

Targeting is one of the most effective tools you can employ in helping to steer your program resources.

Precinct targeting should be part of your planning for voter identification programs, registration drives, advocacy programs, get-out-the-vote drives, and vote goals.

Precinct by precinct voting returns and registration data are easy to find. They are available on hard copy from your town clerk. Also, the Secretary of the State's office can assist you in collecting the needed information.

First, you must collect the following election data:

1. Voter registration figures. Obtain the most current as well as figures for previous years - get the closing figures before each election for consistency.
2. Election returns by precinct from a number of previous election years. Obtain returns from primaries and general elections for local, legislative, federal, and statewide elections.

Second, before you begin, make certain you note any boundary changes from your precinct maps and information from the town clerk or registrar of voters so that you do not make the mistake of comparing OLD precinct 012 with the NEW precinct 012. You may need to add precinct returns together to achieve areas comparable in geography.

### **Formula For Precinct Targeting**

First, establish the combination of votes needed to guarantee victory. Your candidates have to garner 50% of the votes plus 1 to win. However, because close elections can be stolen or lost by accident, shoot for 52% of the estimated vote. This will guarantee a win and give you a cushion if your vote estimate is wrong.

There are basically two methods of targeting precincts - by Republican performance and by persuadability. Republican performance is simply a measurement of how Republican the voters are in a precinct. Persuadability is a measurement of how willing the people in a precinct are to split their tickets, or swing their vote from one party to another.

A ticket-splitter is a voter who casts votes for both Democrats and Republicans in the same election year. Swing voters change their affiliation from one election year to another.

These voters contrast sharply with the straight-ticket voter who "pulls the party lever" or casts all his votes in an election for candidates of the same party. Since ticket-splitters and swing voters are usually the deciding factors in most elections, it is imperative to identify areas with high persuadable potential.

### **Estimating Voter Turnout**

There are basically two easy methods of doing this.

A.

Estimate the turnout percentage of the registered vote and multiply that percentage by the number of registered voters.

To do this, first find out what percentage of the vote turned out in the last similar election. For instance, to find out turnout in 1998 (a gubernatorial election year), check to see what the turnout percentage was in 1988 (another presidential year).

Then find out how many voters are registered in your area. Multiply the turnout percentage for 1994 by the number of registered voters in your area in 1997/98, and viola, you have your estimate.

Example: 5,000 people out of 10,000 voted in 1994 = 50% turnout.

12,000 people are now registered to vote.  $50\% \times 12,000 = 6,000$   
6,000 people will vote in 1998. Easy!

- B. Voter registration purges sometimes make the voter registration numbers unusable for the process above. Then the way you determine voter turnout is by assessing the historical data.

If you can detect the patterns of growth or decline in voting, you can make estimates based upon the assumption that these trends will continue.

Find out how many people voted in the last three or four elections. For example:

1992—2,500      1994—2,000    1990—2,600

Remember, Presidential and non Presidential election years have different turnout percentages, and should never be averaged.

Another easy way is to assume that the difference in turnout between 1992 and 1994 will also occur between 1996 and 1992.

## **Prioritizing Precincts in Your Town**

### **Step 1: Select a Base Race**

This race is usually a statewide or district-wide losing race in which the candidate received no more than the base, or minimum party vote. This race should not be one which attracted a great deal of controversy or one where personality was too big a factor. For best results, and if you have the time, find several “base” races and average them together.

### **Step 2: Select a High Race**

A high race is the best vote performance by a Republican. It should reflect the best effort in attracting Independent and Democrat votes by a Republican.

Try to select a high race and a base race from the same year. If for some reason this is not possible, use both from either a non presidential year election or from an off-year election. Never compare a presidential year figure with an off-year figure.

Again, many experts feel it is better to use a number of races to find your "best" race average.

### **Step 3: Select an Average Winning Race**

Find a race the GOP candidate barely won. If you can not find one, find a race that the GOP candidate barely lost. Failing that, any other kind of close race will do.

### **Step 4: Average the Three Races You Found in Step 1, 2, &3.**

Find the percentage of the vote the Republican received in each of the three races. Then take the three GOP percentages, add them together and divide by three. That will give you the average GOP performance for each precinct.

As noted before, the more races you can use in your averages, the better the results.

The next step is to rank the precincts from best to worst, or highest average GOP percentage to lowest. If you are targeting by GOP performance, most of your work is over. Work the best precincts and ignore the worst. Your resource limitations will tell you where to put the dividing line between good precincts and bad precincts.

### **Step 5: Calculate Ticket-Splitters**

For each precinct, subtract the actual number of votes in the base race from the actual number of votes in the high race. The difference is the raw number of potential ticket-splitters per precinct.

To calculate the percentage of ticket-splitters per precinct, divide the raw number of ticket-splitters by the total voter turnout for the same year.

You can use the same math for swing voters. However, you can not use raw numbers because turnout differences will affect the raw numbers, but will not affect the percentage of swing voters.

### **Step 6: Rank Precincts by Ticket-Splitting Potential**

Sort or rank all precincts by ticket-splitting percentage from highest to lowest.

**With these different rankings, you will be able to allocate key resources to:**

Republican precincts — to solidify your base.

High ticket-splitter precincts — to move persuadable voters to vote for your candidates.

Prioritized precinct rankings can be used in many different aspects of town party voter programs.

For example:

#### **Identification Programs**

An efficient ID program would canvass Republican and ticket-splitter precincts first.

#### **Registration Drives**

Top Republican precincts would be fertile ground for registering new voters.

#### **Advocacy Programs**

Depending upon your strategy, heavy GOP precincts or high ticket-splitter precincts would be targeted for advocacy programs for your candidate.

## **Get-Out-The-Vote**

Your turnout operation should work to turn out identified supporters on election day. If you have not found enough supporters, or have not been able to complete your calling, you might want to "blanket" turnout core Republican precincts on election day.

## **ISSUE RESEARCH**

Many different issues affect the political climate in your town. Concerns range from school closings to global warming. To do your job, you will need to know the predominant issues affecting your area. You will be asked to contribute to the public debate regarding these issues and your opinions may be reported. Likewise, candidates and other community leaders will be counting on you to be their source for issue research.

To determine which issues are most important, monitor:

1. Your local newspapers, magazines, and flyers as well as TV and radio programming. A recurring story, particularly if it involves a local issue, may have the potential of becoming a predominant issue.
2. Letters to the editor. A good paper will run a variety of opinion columns daily or sometimes only on Sunday. Be sure always to read these. You can bet that if a person has taken the time to write an opinion to the paper, he cares about it.
3. City and town board meetings.
4. Opinions of residents, neighbors, and businessmen in the community. Talk to everyone you can about issues affecting them. Before long, you will have a very good idea of what issues are most important to citizens on the street.

When developing your issue areas, do not forget to include state and national issues of major importance to your area. For example, social security or the defense budget may affect your town as greatly as the widening of Main Street.

After deciding what issues are most important, start building or adding to your files of information on these topics. Some good sources for issue research include:

1. Newspapers, magazines, and periodicals. Past issues are generally available at large public libraries. Your local newspaper has a library also called the "morgue". Ask your local newspaper if they will allow you to review their files on a given issue.
2. Congressional Record, and official transcripts of state legislative proceedings. Minutes of the city or town council meetings. These documents are crucial in tracking legislative debate.
3. Special interest group literature. Tap national and local branches of special interest groups such as: The League of Conservation Voters (environmental), Chamber of Commerce (business), National Taxpayers Union (taxes), National Wildlife Association (environmental) or COPE Committee on Political Education of the AFL-CIO (labor).
4. The House and Senate Republican offices in Hartford will be able to provide you with additional materials on state issues.
5. Schools and universities.

As you compile information about an issue, try to address the following questions:

1. What is the history of the issue?
2. What is the present status of the issue?
3. What, if any, are the pending solutions?
4. Who supports and opposes the issue?
5. What have office-holders and candidates said about the issue?

In developing issue research, do not hesitate to use your contacts for help in understanding an issue. Let other people help you do the research so that you can benefit from their knowledge and contacts, or appoint an issues committee, a group of volunteers who will be responsible for these activities.

A task that is easy to assign to others is preparing issue briefings on various topics. An issue brief should be a written summary which answers each of the above questions. Each should be written to cover all the pertinent data, but be short enough to not bog the reader down in useless data.

**Do not forget to verify all of your sources and check all the facts.** It is also best when doing research to use more than one source of information, and never portray hearsay as fact, or rumor as reality. Although you will use this information in many other areas including campaigns and official responsibilities, the issue briefings are not press releases and should not be used as such. They should remain as research documents for internal use only.

The important task of issue research is an ongoing endeavor. You and the GOP candidates in your area will benefit greatly from the expanded knowledge you have collected only if you take the time to prepare carefully. Before you speak on a topic or pretend to know anything about an issue, study it thoroughly.

## **CANDIDATE RESEARCH**

Once you have laid a good foundation for research through demographic, vote history, and issue studies, you can apply what you have learned in developing candidate research, namely, opposition research and Republican candidate vulnerability research.

Candidate research, particularly opposition research, is critical for effective targeting and candidate recruitment. It is important to show a potential candidate how the Democrat incumbent or opposing candidate is beatable. Opposition research is also critical in an election where the primary objective is to give the electorate reasons why they should not vote for your opponent, and why they should vote for your candidate.

It is also important that you discover the Democrat opponent's strengths as well. Your GOP candidates need to know what you are up against.

Although each candidate running for office will probably undertake some opposition research of their own, the Republican party can provide the basic argument about why the opponent should not be elected. If no credible reason can be given about why the electorate should not elect your opponent, that reduces the credibility of your own campaigns.

At the town or local level, you will frequently encounter candidates who have no "official record", e.g. those who have never before run for or held public office. It is wrong to think that you cannot conduct opposition research on these candidates. You can. Although a public record of flip-flops, missed votes, and sponsorship of unpopular legislation are the classic examples of juicy opposition research, first time candidates can also be easily researched.

## **Opposition Research**

Have each of the candidates you are working with fill out the "Strengths and Weaknesses" and "Who Should Vote for You and Why" forms at the end of this section. The insight these exercises provide will help steer your research both for your potential opponents and on Republicans as well.

If your opponent is an incumbent, continue the process by reviewing his or her record while in office:

1. Check the opponent's voting record. Evaluate legislative history for:
  - a) Votes which had a negative impact on the community or the average citizen;
  - b) Votes which put himself first such as pay increases, PAC contributions;
  - c) Votes which may indicate the opponent is "out of touch," not in step with majority opinion in your community;
  - d) Votes which contradict his or her public or campaign position;
  - e) Missed votes;
  - f) Inconsistencies in voting on specific issues (flip-flops).
  - g) Campaign finance reform
2. Look at sponsored legislation. Is the nature of the opponent's sponsored bills trivial? Are the priorities represented in the legislation consistent with the priorities of his or her constituency?
3. Collect and check previous campaign literature. Has the opponent kept promises made in that last campaign? Has the opponent done anything to solve the problems he or she was committed to solve?

4. Check out an opponent's committee attendance, leadership, and action on key votes. Has the opponent taken no action on an important or an emotional issue? Is he or she particularly helpful to any special interest?
5. Review previous campaign contribution reports. These are available at the Federal Election Commission (FEC) for federal candidates, and through the Secretary of State's office for state candidates; and through the town clerk for municipal candidates.

For non-incumbents and incumbents alike, check the following aspects of an opponent's record:

1. Obtain candidate biography or resume, press kits, and current campaign literature. Do a quick check on the basic items on the resume. Did Abner Shimoney really head the United Way Drive this year, and is he really a graduate of Yale?
2. Check all public statements. Begin a quotes and speeches file on each candidate. Look for contradictions and inaccuracies.
3. Research an opponent's various places of residence in his or her lifetime. "Carpet-bagger", is often a hard label to run from.
4. Carefully evaluate current personal financial disclosure forms required of all candidates running for public office. Look for possible examples of potential conflict of interest with the responsibilities of office. Likewise, look at out-of-state investments and holdings.
5. Evaluate current or past campaign expenditure reports.
6. Carefully research contribution filings. Who are your opponent's donors? Assess their particular interest your opponent's campaign.
7. If your opponent owns, works for, sits on the board of, or is a major stockholder in a company, collect what information you can about that firm's background, clients, business practices and legislative interests. Collect the firm's annual or quarterly reports; collect industry literature such as the Standard and Poors series report.

Many of the sources discussed in previous sections should be tapped for opposition research. The press in your area will be supplied with much of the campaign related materials, whereas industry periodicals can be found in a library or through special interest groups.

One final word about opposition research. So much press attention has been paid to negative advertising primarily because it works so well. **Do not be fooled into thinking that opposition research is negative advertising There is nothing inherently negative about accurately depicting your opponent's record.** You need to be prepared to face opponents running for office and there is no better way to disarm them than to know their record better than they do.

The second reason why you must engage in opposition research is simple: They are going to do it to you!

### **Vulnerability Research on Republicans**

***The tactics of opposition research will certainly be used against Republican candidates and therefore, you need to prepare candidates in your area for the potential attacks.*** Getting a candidate to think about their own weaknesses is an important first step in the development of their campaign.

Vulnerability research on your own candidates should be conducted in coordination with the individual candidates. Because the information may be sensitive, the research must be conducted in strict confidence. If approached with respect and sensitivity, candidates always seem to benefit from this exercise.

You may want to conduct opposition research on your own candidates during the candidate recruitment phase of your relationship. Using public records that are also available to your Democrat opponents, put together research that is just as detailed as what you would do to your Democrat friends. Then you and your candidates will know what punches will be thrown before the fight. Fore-warned is fore-armed.

If what you find is insurmountable, you might want to find another candidate.

Be sure to tell your candidates you are doing this. If they refuse to let you do this, that tells you something. Again, make sure the results are kept highly confidential.

One of the best ways to begin this line of research is to gather a group of the candidate's close friends around a table and let them talk about all the good and bad things they know about him or her. It is always a surprise how much your friends know. Whatever you do, do not ask the candidate to the meeting.

## **SURVEY RESEARCH**

Like no other tool in a political professional's arsenal, survey research, or polling, provides the user with real data measuring a community's collective and trait-specific attitudes. A survey provides a snapshot of respondents' attitudes, knowledge, likes and dislikes, and their propensity to be swayed in one direction or another.

Surveys are not necessary for every organization. Professional surveys are expensive and can run anywhere from \$6,000 to \$18,000 for a congressional district sized survey.

A political organization can act as a partner with a campaign (or several campaigns) in conducting surveys, thus absorbing part of the cost of the poll.

Surveys done in-house by volunteers under your supervision are usually much less reliable and require an enormous amount of work. If you have the resources and need hard data regarding the community's attitudes, you should consider taking a professional poll.

There are many good reasons to conduct a survey in your area. These reasons include:

1. To test an opponent's weaknesses and strengths, providing the arguments for candidate recruitment and initial opposition research.
2. To provide a "benchmark" or starting point for measuring the impact of your efforts as you conduct your programs. A "benchmark" poll allows you to judge your "improvement" in a variety of areas.
3. To test potential messages, themes and issues for voter programs, media, and fundraising strategy development.

## **The key elements of an opinion survey are these:**

### a) The sample.

You will need to draw a sample which should be selected at random within an accurate demographic cross-section of the total population (or voting age population). There are sampling firms that do this for a price, and some off-the-shelf computer programs will draw random samples for you from your voter file. Pulling the first name off each page of the phone book is not acceptable because it is not really random sampling. No matter how small the area, you will have to make at least 300 completed calls, which means you will have to draw a sample of at least 900.

### b) The questionnaire.

Often the most debated aspect of the process, the questionnaire can make or break your survey. If you do not know how to formulate questions in clear, concise, unbiased fashion, do not try to write a questionnaire. Questionnaire writing is a science and is best left to professionals. If you can't find a professional to write yours (the political science department of the local university may come in handy here), copy your questions from an old candidate's survey, if you can find one. Do not forget to stick to your goals.

### c) Conducting the interviews.

Proper supervision of a survey research phone bank is a full time, painstaking task. The calling must be constantly monitored to detect and erase the bias among callers. Also, the calling must be done in a short time period to be valid. Note that supporters who are business owners can provide office space and phones as a donation. However, this may be considered a election contribution, depending on state law.

### d) Analysis.

After you complete the calls, the data must be put in a format you can use. It's a big step from taking a pile of completed surveys to finding out what conservative Democrats think about taxes.

The data will have to be keypunched and run through a computer. Hand tabulation would take months, and will not be as accurate.

There are computer software programs that will allow you to cross-tab all of your information as well as show cell size and other pertinent information. You really need a computer to manipulate the data if you are going to do more than a one or two question poll.

See why people pay pollsters big money to do survey research?

If you do decide you want to devote your resources to survey research, consider the different options available for getting the data you need:

1. You can do the survey yourself from your party headquarters or on volunteered telephones. However, because of the technical aspects of survey research, you should still get advice from a polling expert.
2. Another source for local polling is your local Republican Women's Federation Club. The NFRW has extensive expertise in assisting party organizations and campaigns in survey research. Also, there may be somebody locally who is trained in survey research. Your state party can also help you with setting up your survey.
3. Hire a professional pollster. Although expensive, if you can coordinate with others interested in doing the survey with you, it can be cost effective. The greatest benefit of hiring a **firm** to conduct a survey is that their technical methods (drawing the sample, wording the questions, phoning cost effectively, coding, and tabulation and analysis) are tested and proven.
4. "Buy on" to other marketer's surveys. This practice is well established. Your organization may be able to buy three or four questions on a larger survey being conducted in your area. However, rarely do companies or associations conduct a survey research in only one town. This is an interesting option, if you can find the right vehicle.
5. Local universities often conduct survey research as projects in classes. Contact the political science department to see if they are planning to conduct any survey research in your area this year. You may be able to get them to add some questions you need answered. On very rare occasions you might be able to get them to do a survey for you.

## RESEARCH CHECKLIST

Who are the elected officials in your town?

What are the political breakdowns on the boards and commissions?

Are there political factions? Alliances? Any major grudges?

Who are the "movers and shakers" in your town?

What percentage of your town works for the government?

How many people are employed outside of your town?

What is the local history of your community? Any famous residents?

How many people belong to a union? Who are the union leaders?

What percentage of your town are senior citizens?

How strong are the veteran organizations in your town?

What is the proportion of racial/ethnic groups in your town?

What do most people do for a living?

What is the average income?

Who are the ten wealthiest families in your town?

Who are the people in your town who do the talking?

What are the local media markets? TV? Radio? Newspaper?

Who owns the local media? Who runs and reports for the local media? Who listens to what radio stations? When? (Check arbitron ratings.)

Who writes the newspaper editorials?

Who decides the newspaper endorsements?

Who is the main employer in your town? Who owns that business?

Who heads the local United Way fund?

What are your local civic organizations? Do they endorse candidates?

What is the unemployment rate?

What are the top ten Republican precincts?

Bottom ten Republican precincts?

What is the town's most-reported crime? What is the conviction rate?

Where are the most dangerous roads and intersections?

Are there any colleges in your town? What do you know about them?

What are the mascots and colors of your town high schools and colleges?

What is the biggest federal project? State project? Local project?

Do you have any military installations or defense contractors? How many people are employed there?

Where are the senior citizen centers in your town? What sort of programs do they have? Where do groups congregate after 8 p.m.?

When is your county fair? Any parades? Festivals?

How are your local sports teams doing? Are there any big games coming up?

Where are the major utilities in your town?

Are there any mental institutions in your town?

Are there any prisons? What is the prison population? Is the prison overpopulated? Have there been any major incidents in the past 2 years?

What are the local tax rates? How do they compare with the remainder of the state?

What is the average price of a new home?

Is the economy in your town dominated by one industry or is it diversified? Is the economy stable or is it cyclical?

Has any legislation (national or state) affected your town?

What Republican auxiliaries (Young Republicans, Teenage Republicans, etc.) exist in the area?

What should be done to improve or strengthen them?

Was a voter registration drive held last year? What can be done to improve it?

Is a list of registered voters readily available for local Republican campaigns?

How useful is the list? Can it be reproduced on computer tape or a floppy-disk?

Can the list of registered voters be ordered for precinct walks? Are phone numbers available for each voter?

Is there a vendor who has the voter list and who can produce these lists quickly and cheaply for local Republicans?

What are the absentee ballot laws in this state?

What program has the local party instituted to ensure every eligible Republican is in fact casting an absentee ballot?

What was done last year to identify favorable voters for local campaigns?

If phone banks were used, were they paid or volunteer?

Were enough phone calls made to identify enough voters to guarantee victory on election day?

How many volunteers are generally available for the local party?

Does the local party supply campaigns with a list of potential volunteers?

Who is in charge of volunteer recruitment for the local party?

What system is in place to keep volunteers active, motivated and, therefore, coming back to help time after time?

Where are the potential pools of volunteers?

How can more volunteers be recruited?

What other responsibilities can be given to your best volunteers?

Who is in charge of candidate recruitment?

Is an exhaustive search made for the best candidates for every office?

Do candidate recruitment efforts start early enough in the election cycle?

Do we target Democrat opponents before starting the candidate recruitment efforts? What criteria do we use to determine which Democrat office holders are most vulnerable?

Who is responsible for opposition research?

Was the opposition research complete? Was it done on time? Was it in a usable format?

Are past election results available by precinct?

Have the past election results been analyzed?

Have precincts been targeted based on past election results?

Is survey research a service you want to provide for campaigns? Can you afford it?

Who should do your survey research? When should it be done?

What are the laws governing political fundraising in this state?

What other laws and regulations are important to a local party?

How much money has your party committee given to candidates in the past? How much should they give in the coming elections?

**CANDIDATE ASSESSMENT MATERIALS**  
**YOUR STRENGTHS AND WEAKNESSES**

Review your background, your work experience, your social and political experiences, your style, lifestyle, beliefs, habits, record, home, family, likes and dislikes to construct of your relative assets and liabilities. List your strengths on the left and your weaknesses on the right.

**STRENGTHS**

**WEAKNESSES**

YOUR OPPONENT'S  
**STRENGTHS AND WEAKNESSES**

Make a list of your opponent's relative strengths and weaknesses.,

STRENGTHS

WEAKNESSES

## **WHO SHOULD VOTE FOR YOU AND WHY?**

If you were able to communicate effectively with all the voters in your town, who would vote for you and why? Who would vote for your opponent? Who would vote against your opponent? Who would vote against you?

GROUPS THAT SHOULD VOTE FOR YOU  
WHY?

GROUPS THAT ARE LIKELY TO VOTE AGAINST YOU  
WHY?

GROUPS THAT ARE LIKELY TO VOTE FOR YOUR OPPONENT  
WHY?

GROUPS THAT ARE LIKELY TO VOTE AGAINST YOUR OPPONENT  
WHY?

**DEALING WITH THE  
NEWS MEDIA**

## DEALING WITH THE MEDIA

The initial contacts that you have with the news media (radio, television and newspaper editors, reporters and publishers) are the most important since those contacts can set the tone of the relationship between the town chairman and media for your entire term.

A successful party needs the goodwill and respect of the news media - even though it may not get the editorial support. Political leaders and town chairmen need the news media more than the news media needs them. One reckless or rude remark to a newsman is probably among the worst of public relations blunders.

Reporters are busy individuals, particularly those associated with large newspapers and broadcasting stations serving large markets. They are bombarded constantly by telephone calls and news releases on everything from the President's schedule to the monthly meeting of the Garden Club.

Since the media cannot possibly print all the campaign releases they receive because of time, staff and space limitations, releases have a much better chance of being used if they are of significant news value and, perhaps as important, professionally presented. Therefore, the mechanics of news media relations are vitally important.

Reporters will grow to respect a town chairman or candidate and pay closer attention to his material if he has built a reputation of thoroughness, conciseness, and good news judgment.

When dealing with reporters, through press releases, news conferences or interviews, be concise and brief with all remarks and answers. You should have researched an issue thoroughly enough to be able to comment on it intelligently and point out significant conclusions.

Unnecessary and extraneous text of remarks should never be used. For any point to be driven home in the mind of reporters (and, hopefully, through reporters to the voters), it must be presented as simply as possible. Too many facts or details will not always clarify and may serve to fog or misrepresent the candidate's remarks.

## *The Ten Commandments of dealing with the news media*

In dealing with reporters, there are ten basic principles of conduct.

- 1. Always be available to reporters.** Reporters will forgive just about anything but an unanswered telephone or an unreturned call or an unavailable candidate. So make yourself available. Besides, it is good for you to know what reporters want to know, even if you do not have the answer right off.
- 2. Do not be rushed into saying something you may be sorry for later.** If a reporter calls you for a comment on something hot in the news and you are not prepared to discuss it, tell him so frankly. If he insists on a statement, he is just doing his job. Find out his deadline and tell him you will call him back. This will give you time to assess whether you want to comment and, if so, to prepare a statement. But be sure to call the reporter before his deadline runs out.
- 3. Be honest with reporters.** If you break the other commandments, the press may forgive you, but not if you mislead them. Level with them, stall them, if necessary even kid with them. And do not hesitate to use the old standby "no comment". But do not deceive them. Even white lies are out.
- 4. Do not scoop a reporter on his own story.** If a reporter calls you for comment on a story he has developed, give it to him on an exclusive basis. Do not put out a press release for the rest of the media.
- 5. Do not argue with a reporter or an editor.** For one thing, you cannot win. They invariably get the last word, and it is usually something you will not like. If you feel you are not getting a fair shake from a reporter, invite him to lunch and discuss it with him frankly. Tell him how you feel. You may be surprised at the results. Most reporters pride themselves on being fair. Go over the reporter's head to his boss only as a last resort.
- 6. Do not play favorites.** If you have several reporters covering your campaign, it is a good idea to give them all the same breaks on news stories. Although it is sometimes hard to keep from leaking a story to one reporter, especially if he has been writing favorable copy about you, just remember that you will alienate the others if you do - and they do not forget easily.

**7. Do not insist to a reporter that he owes it to you to write a story about you and your activities.** If the information you are releasing or the activity you are involved in is newsworthy, any reporter worth his salt will write the story, and his newspaper will carry it.

**8.** When talking to reporters, either individually or as a group, **establish at the start whether you are talking for quotation, off the record, or for background.** This is especially important if you are not well acquainted with the reporter and have not established a previous basis for such conversations.

**9.** Remember the Harry Truman doctrine: **If you cannot stand the heat, get out of the kitchen.** Do not blow up over an unfavorable story a reporter has written. Do not call and castigate him. Forget it. In fact, you will be amazed at how many people did not see the story. An unfair story in which the reporter's facts are wrong or interpretation off base is different. Contact him to set the record straight.

**10. Go out of your way to be helpful to reporters.** Get to know reporters, both print and broadcast, on a first-name basis. Compliment them on a well-done story or a broadcast. These guidelines will not get you elected by themselves; but if followed, they will help steer you away from a lot of pitfalls.

The tools you will generally use in communicating with the media will, most likely, fall into one of the following four categories:

- I. News Releases
- II. Media Kits
- III. News Conferences
- IV. Earned Radio and Television Exposure

### *News releases*

Publicity should always contain some news value. News releases sometimes come out fast and furiously and reporters often groan over the lack of real news. Some media, especially in smaller towns, are more inclined to accept political releases because, frankly, they are often "hard up" for news of politics and local people. Others are more selective.

Because of the nature of the media, the most used releases are the best written (in news style), the most timely, and the most specific. A constant flow of self-aggrandizement and promises won't get your name before the public.

Know your local editors, radio and TV reporters and other influential media people and learn which ones you can depend on to use your releases. Too often the releases rollout and are "filed" in the nearest trash can.

How to make news (and sometimes manufacture it) depends on the candidate and his campaign strategy. Here are a few possibilities:

***When to use a news release***

1. Selection of candidates
2. Campaign headquarters opening
3. Key issue statements
4. Tie-in stories about the candidate's position in regard to the statements of other government leaders, with a stress on the local angle.
5. Town or state coordinated campaign issues and candidate team work
6. The selection of committee chairmen and major campaign staff
7. The formation of campaign committees

***News release format***

News releases should be distributed to a regular mailing list. This list should be prepared with great care and thoroughness so that all the local media are included.

News stories should be typed (double spaced) for reproduction on regular 8-1/2 x 11" paper. A heading may be mimeographed or printed in advance and should include this information:

NEWS FROM (name of town) REPUBLICANS  
(address of headquarters or office)

(telephone number of headquarters or office)

Include the name and phone number of a "contact" the media can call for clarification or additional data. Keep your release simple.

Place the release date (when the release may be printed) in the upper left corner. This should usually be "FOR IMMEDIATE RELEASE". Sometimes you may want to time release, "For release Wednesday, January 15 at 2:00 p.m."

At the bottom of each page, center "-more-" if the release is continued on another page; and in the upper left corner of the continued page, write "1", "2", etc. At the end of the release, write "#" or "-30-".

Keep the margins wide so the editors can pencil in instructions to the typesetter or add copy. Also, leave plenty of space (about 2 inches) at the top of each page.

When paragraphing, make it obvious with a large (usually 5 spaces) indentation. Keep the paragraphs short, about two or three sentences on the same topic, so the release is easy to read.

The lead or first paragraph in a news release is the most important since it must be the attention getter and summary of the news release. This paragraph should be able to stand alone if necessary and tell the whole story, with only minor details missing. The lead usually includes who, what and when in the first sentence and where or why and how (whenever applicable) in the second and/or third sentence.

The rest is more for identification and perspective.

Lead sentences seldom run more than 20 words in length. Other sentences should remain concise and short also. Often an editor may want to cut your story shorter to fit his available space, so the inverted pyramid style should be used. This style features the lead first, with paragraphs following that give information in the order of importance. Using this system, an editor can cut the story without losing the important content. A lead paragraph should be sufficient to tell the story by itself.

Remember to make your releases newsworthy and concise. Ask yourself these questions about each release:

1. Does it say something brand new?
2. Is it in some way different and out of the ordinary?
3. Does it deal with only one matter?
4. Does it apply directly to the self-interest of the voter?

### ***Distribution of news releases***

Getting the releases to the right person at the right time is just as important as writing them well. If you don't already have one, compile a media distribution list to serve your town.

If possible, visit the manager of every station and paper personally. Leave a media kit made especially for that medium. Ask the manager or editor to whom you should direct your releases, and check out news deadlines. Also ask to be introduced to the person who will receive and process your releases. Your interest will be appreciated and their personal contact will help assure release usage. After the media mailing list is complete, make up a dozen or more sets of addressed envelopes. This will save time and frenzied moments as the campaign rushes on.

Deadlines are very important and vary with each publication to some extent. Sunday is often a good time to release news. Mondays are often slow news days and your chances of getting the release published are much better. This may not always be possible, but should be considered. Weekly newspapers may have a variety of different deadlines, so remember to make a schedule of all newspapers' deadlines to keep track of what should be distributed when.

Radio and TV stations also have news deadlines, so be sure to include that data in your master schedule.

### *News conferences*

Successful news conferences require participation by local media such as newspapers, radio and TV. If they are unwilling to assign their staffs to cover the event (or unwilling to use the film, tapes and written releases that you yourself prepare), the conference is worthless. Therefore, hold a news conference only when the news or subject involved is of very special interest. Remember, don't over-use the very valuable tool of the news conference. Use it only when the subject is judged really vital to the campaign.

There are several ways to announce a news conference to the media. An advance written news release, followed by phone calls to the newspaper editors and station managers on the day before the conference are always good. In the release and in the phone call, tell the media that you will hold a news conference on (give date, place and time) to discuss (give theme or the primary subject of the conference). Letters of invitation to specific reporters are also used but should be followed by a phone call after the letter has been received.

On the telephone, in the letter and as an editor's note in the release, it should be pointed out that the campaign's staff will be happy to work out details concerning lighting, microphones, electrical connections, etc.

### ***Setting up a News Conference for Radio and TV***

Pay attention to the room where the news conference will be held. There should be adequate room in front of and on the speaker's podium for microphones, both TV and radio. A low, large area table should be located near the front of the podium on which the reporters can place their equipment. Reporters should be seated between the podium and the camera equipment.

Locate the room in a relatively noiseless area and place the podium against a solid backdrop as opposed to a glass window or patterned wall.

Always refer to the conference as a news conference, not a press conference.

### ***Tools***

Effective publicity is easier and more effective when you have good “tools” for the job. You can get them from several sources.

1. This manual is one.
2. Many news media people will supply you with guides to follow in preparing copy for them.
3. The service of a competent photographer, preferable one accustomed to news work, who can provide fast, dependable service.
4. A “media kit” containing a biography of the candidate, a summary of the candidate's platform, a list of campaign leaders, a photo of the candidate alone and photo of the candidate with family - all collected in an attractive envelope or packet.
5. A good quality cassette tape recorder.

FOR IMMEDIATE RELEASE  
June 18, 1997

CONTACT: Fergus Cullen  
860-547-0589

HARTFORD —

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# Media Checklist

## *Cultivate Relationships and Establish Credibility With the Media*

Tips to remember:

1. Make all remarks to the media brief, concise and consistent.
2. Always consider and honor reporters' deadlines.
3. Schedule appointments when visiting the media.
4. Be honest at all times.
5. Never “scoop” a reporter (don't put out a press release for the rest of the media when a reporter has developed an exclusive story).
6. Do not argue with a reporter.
7. Do not play favorites.
8. Never try to force a reporter to print a story.
9. Establish ground rules in advance if you are speaking "off the record" (but the best advice is don't speak "off the record").
10. Never reprimand a reporter for a story you view as negative, but do point out factual mistakes
11. Always be complimentary to the reporter for good work that is done.
12. Always be courteous.
13. Don't let anyone else speak for the candidate.

## *News Releases*

Deciding when to use a news release:

1. Announcement of candidacy and setting up campaign.
2. Opening of campaign headquarters.
3. Tie-in stories about the party's position in regard to the statements of other government leaders, with a stress on the local angle.

4. The selection of candidates.
5. The selection of committee chairmen and major campaign staff.
6. The formation of campaign committees.
7. Selection of candidates.
8. Selection of committee chairmen and major campaign staff.

*Make Sure the News Release is Newsworthy:*

1. Communicates new information.
2. Information is timely.
3. Information is focused and concise.
4. Information is interesting and/or important to the audience.
5. Don't over-use press releases.

*Preparing a News Release:*

1. Follow deadlines.
2. Send a copy of the release to the prepared list.
3. Send only one release to each outlet.

*News Conferences:*

1. Make sure news is of a very special interest.
2. Never over-schedule news conferences.
3. Never refer to a news conference as a press conference.

4. Write advance news releases with details about time, place and subject.
5. Follow-up news releases with phone calls.
6. Inquire about proper setting (lighting, microphones,. etc.).
7. Prepare needed text prior to the event.
8. Provide written news release on what will be said.

*Use Proper Style at All Times:*

1. Include release date or FOR IMMEDIATE RELEASE at the top of the page.
2. Double-space all text.
3. Keep all margins wide.
4. Place "-more-" at the bottom of the page if the text extends to the next page.
5. Number the pages in the upper left-hand corner.
6. Write "#" or "-30-" at the end of the release.
7. Keep paragraphs short.
8. Put most important information in the lead (first paragraph).
9. Make sure information in the lead can stand alone.
10. In advance, prepare a complete and accurate list of all district media including:
  - a) names of the editors
  - b) names of the publishers
  - c) names of station managers
  - d) names of reporters covering politics or local government

- e) street address
- f) mailing address
- g) telephone number
- h) fax number
- i) dates of publication or broadcast 'deadlines

2. In advance, visit area media and introduce yourself to managers, editors and political writers.

# FUND RAISING

## FUNDRAISING

Fundraising is often the most discussed and most frustrating activity in a local political organization. Valuable programs never take place because the money is not available, or it is not available at the right time. Our party's message never reaches the voters because there are no funds to deliver it.

It does not have to be that way. Too often GOP organizations do not have the money because most people simply would rather do anything than ask for money. Nevertheless, money is such an important part of the political process, we cannot avoid it. As long as there are campaigns for public office money will need to be raised. No party organization can discharge its ongoing responsibilities without financial resources.

Many fundraising problems are the result of poor planning and sloppy organization. Recent public opinion surveys have shown many Americans are willing to make political contributions but the problem is they have never been asked. The request must come at the right time, from the proper person, and be for the right amount. Only with a good finance plan and organization can you raise the money you need.

### Fund-raising strategy and plan

A party's fund-raising strategy and plan is derived from its political plan and budget. Before you can have a fund-raising strategy and plan, you first must know how much money you need to raise and when you need to spend it. This is what a political plan and budget give you: fund-raising goals and a timeline by which the goals need to be met.

Never, under any circumstances, let your political plans be dictated by the availability of funds. Despite the hard work required to raise the money you need to win, the chances of you losing are far greater if you let your finances dictate your political decisions. Always decide first what it will take to win, then figure out how much it will cost.

Once you have a political plan, timeline and budget, you can begin to develop your fund-raising strategy and plan.

Many people ask why they should bother writing a finance plan. A written plan is essential because it presents an organized effort which sets deadlines, defines responsibilities, establishes the party's credibility, and measures the party's progress.

In order to project how much money you need to raise for your campaign, it requires your campaign to evaluate previous campaigns' fund-raising. Through research, you will be able to see what has worked in the past and why. When you conduct your research, answer the following questions:

1. How much money has been raised in the past?
2. Who raised the money?
3. What techniques were used in the past?
4. How were the past programs structured?
5. What laws affect the fund-raising program?
6. What lists will you use?

Your finance plan should consist of the nuts and bolts of the program and how it is going to be implemented. In the plan, each fund-raising tactic should be broken out separately. Indicate both the gross and net amounts to be raised, as well as total cost of the program. Once the finance plan has been written, and the finance committee has agreed to the plan, then approaching contributors is the next tactic.

Before approaching a potential contributor, you should first ask yourself the following questions:

- Who will contribute to my town committee?
- Why should they give to my town committee? What will their contribution be used for?
- How much should they give?
- When should they give their money?

If you can convincingly answer these questions and then "close the sale", your efforts will be rewarded with their contributions. In answering these questions, you narrow the universe of possible contributors to those who are most likely to give to your town committee. This helps your fund-raising program be more cost-effective because you can concentrate on those people who are best able to contribute.

In most towns, there are a variety of people who contribute. Listed below are categories of people who usually contribute to town committees:

- Family and friends of the candidates and town committee members.
- Town committee and finance committee members.
- Professional, business, civic and social contacts of candidates.

## *Philosophy of giving*

To develop a fund-raising strategy for your town committee you must understand why people give to political parties and candidates. The money that people donate to political town committees is not vital to their existence. In other words, it's extra money not needed to feed and clothe their families. Although it's their extra money, you still need to give contributors a reason to give their money to you. If you can understand why people do or don't give, then you'll be in a better position to make effective appeals to potential contributors.

At the root of effective fund-raising is the personal appeal.

People need to feel they have a stake in the party and its success. Most often, if people contribute to your town committee, you can count on their vote. Asking someone to contribute to your town committee is like asking someone to make an investment. Effective fundraising depends on the ability to appreciate the reasons why people do and do not contribute.

Here are some of the major reasons why people contribute to a town committee:

1. Solicited. They were asked!
2. Personal relationship/friendship
3. Habit. A regular practice of giving to a candidate or party-sponsored candidates
4. Reward. To demonstrate appreciation for the efforts of a candidate or party policies.
5. Access. To establish an opportunity to have their opinion considered.
6. Change/Affect Policy. The desire to take an active role in helping bring about change that will affect the contributor.
7. CYA. To cover all political bases.
8. Democrats. They oppose what the Democrats are doing and will do if elected.

And here are some reasons why people do not contribute to town committees or candidates:

1. Not asked!
2. Unspecified amount. They do not know how much to give.
3. Vague appeal. The appeal did not tell them enough information about how to give, how much to give and in what time frame to give.
4. Unconvincing appeal or offensive appeal.
5. Inexperienced giver. They have never contributed and don't know how to contribute.

Anticipating these common negative reactions to your fund-raising efforts can help you develop more effective solicitation. As you can see, most of the reasons people do not give can be corrected by adjusting the appeal to fit the potential contributor. You need to know how to reach each type of potential contributor with the “right” appeal to make them feel comfortable enough to give money.

## **FUNDRAISING TACTICS**

Your fundraising strategy should involve as many different major tactics as possible. Remember, the success of your fundraising program is determined by the number of people you ask to contribute in as many separate ways. The more people you ask, the more money you will raise.

### **Finance Committee**

Good people raise more money. Nothing is more simple to understand, yet as frustrating to accomplish. Finding the right people to serve on your finance committee does take time and lots of hard work, but it is well worth the effort in what it brings to the organization: a bigger network to raise money. The best fund-raisers are people who know lots of people in many different industries and walks of life.

**A strong finance committee begins with a good chairman.** He or she must be an aggressive, dynamic person who is not shy about asking for money. The first duty of the finance chairman is to recruit and activate the finance committee. The finance chairman must also be prepared to raise money himself and contribute both time and money to your efforts. An ideal finance chairman should have the following attributes:

- Organized
- Well respected and known in the community
- Committed to the Republican Party
- Has the available time to do the job
- Has political fundraising experience
- Is willing to be one of the earliest and/or one of the largest contributors

If you cannot find someone with experience in political fundraising, try to find a person who has been involved in raising money for charities, churches, or other organizations. You may want to consider people who have been in sales, real estate, the local chamber of commerce, small business, and other civic activities.

Once selected, the finance chairman should work with the local party leaders to recruit the finance committee. The chairman should oversee the committee, track its progress, and make sure committee members are supplied with the appropriate materials.

The finance committee has the primary responsibility of raising a major portion of your organization's funds. This will be accomplished through individual solicitation, major donor clubs, and special events. Each member of the finance committee must be willing to make an individual contribution as well as solicit money from his or her peers.

However you choose to organize the finance committee, the goals for each member should be clearly established and defined, and all members of the committee must understand the lines of authority and responsibilities. If your fundraising plan is aggressive, your finance committee will most likely include co-chairmen, vice-chairmen, or "team captains" who report to the chairman.

The best way to recruit your finance committee is to develop a thorough list of potential members. Strong finance committee members are people with strong community contacts, an ability to accomplish goals in a timely fashion, and a strong commitment to the party.

Another obvious source of finance committee members is your list of major donors from the past. People who can give big bucks can sometimes raise big bucks. Big donors to state or national political committees may also be a source for your town committee.

You should discuss your political plan and goals with your committee members. You should tell them ahead of time what is expected of them. It is very important that these people are tied into the overall effort of the party so that they will be motivated and committed to your programs and therefore interested in funding them.

The finance committee should meet on a regular basis. The first meeting is held to discuss how the committee will function and to establish and assign individual fundraising goals. Subsequent meetings should then be held to report on the progress of those goals and to discuss special projects and deadlines.

Recognition, appreciation, and information are extremely important to the finance committee. Consider establishing a special finance committee newsletter. Keep your finance committee briefed in regard to local political happenings of interest and your organization. Introduce them to local leaders, and include them in your circle of political contacts and activities.

Have your best ticket salesmen introduced at your fundraising dinners. Arrange private meetings with elected Republican officials and your finance committee. Do not forget the power of a simple "thank you" and "job well done".

Never miss an opportunity to reward this very important group of people. Your finance committee is important to your success.

### **Person to Person Solicitation**

One-on-one solicitation is the most cost-effective way to raise money. You will probably do much of it yourself, and you will help others learn to be good at it as well. It is well worth your time to practice soliciting money from people. If done correctly, one-on-one fundraising is the best method of raising fairly large sums of money quickly.

Just as the name implies, person-to-person solicitation requires that a person directly ask a potential contributor for money. Because it is the most personal form of fundraising, it is sometimes considered the most difficult. Here are some guidelines to follow when asking people personally for money:

1. Promote the idea that they are making a personal investment in a better future based on what they believe in as citizens.
2. Be optimistic, aggressive, sincere, and excited about the organization and its impact on the community.
3. Be convincing. Demonstrate that you believe in the importance of the programs to be funded.
4. Be flexible. Close the deal when you sense the person is ready, even if you have not finished your pitch.
5. Look at the situation from the potential contributor's point of view.
6. Communicate with potential contributors on their level. For example, treat CEOs with the respect they deserve while you educate them about your organization.
7. Show the potential contributor what their money will buy, or how it will be used.

8. Refer to the "community" and show the role and involvement the organization has within the community.
9. Never over-sympathize with your potential contributors. Do **not**, for example, begin the discussion, with "I know it is a lot to ask, with all of your other expenses, but..."
10. Do not leave without a firm commitment, and, if possible, a check in hand.
11. Always ask for names of other people who may be interested in becoming involved.
12. **Follow-up all leads!**

### **Major Donors**

Establishing a major donor club or several different finance clubs is an effective way to utilize your finance committee to raise money.

Membership in a club should be based on a contribution or level of contribution. The contribution level set for a major donor club should be established early in the town committee cycle or budget. Define your guidelines with the idea that the program will be ongoing and will last even after your tenure as party chairman is over.

One of the major reasons for establishing donor clubs is that a large portion of the donors to your party must be people who give year after year. A club makes this easy for the giver to do and establishes the habit of giving. Asking for membership renewals are dramatically easier, for both the donor and your finance committee, than prospecting for new givers.

Successful major donor programs must have two ingredients: continuity and integrity. You should continue the programs year after year to confirm their reputation and influence. The benefits or "perks" you establish should be consistent and fit the level of the club.

Give serious consideration to the benefits of membership. These benefits can include recognition at special events, exclusive receptions with special guests or speakers, special pins or cufflinks, or even trips to the state capitol. Always, always, always fulfill your promises. Nothing will compromise the integrity of your program faster than failure to deliver. It is important that your major donors know that their sacrifice is not in vain. Furnish your major donors with perks that non-members cannot get. Keep the club benefits exclusive to the major donor group.

Many party organizations establish two or three levels of club membership. For example:

Loyal Elephants	\$50 per year
Golden Elephants	\$100 per year
Diamond Elephants	\$1,000 per year

There are probably very few people living in your area today that cannot afford to join a small donor club like the Loyal Elephants. Once people have joined a small donor club it is possible to push them gently into a more expensive club.

You will also need to develop some materials to make it easier for your finance committee members and recruiters to help them stay involved, and, in turn, raise more funds. A packet or fundraising kit is an effective way to organize the materials required. The packet should include virtually everything they will need to be effective fund-raisers. Comprehensive kits would include:

- A brief summary of the political plan
- An outline of the finance plan
- A budget and timeline
- A description of all the major donor clubs and benefits of belonging to each club
- A list of finance committee members and their phone numbers
- A list of the party leadership with phone numbers
- Brief summary of Republican incumbent officeholders and candidates
- A brief summary of the election law governing political contributions
- Contribution cards
- Thank you letters

Although donor clubs are most cost-effective with large donors, the small-donor clubs can deliver good results. The only difference should be that the cost of admission is less, and the benefits, while still attractive, are fewer.

## Events

Events can be lots of fun and raise lots of money. The key to a successful fundraising event is to understand why you are holding the event. The purpose of a fundraising event is to raise money. Always remember that purpose, especially when establishing priorities and setting your ticket prices.

If you are holding another type of event, like a rally or a volunteer awards party, do not make it a “fund-raiser”, even if you are charging admission. Do not confuse the purpose of your fundraising events, and prevent your events from getting out of control so that you do not meet your goals.

Many town committees already have a tradition of holding a yearly fundraising dinner. The good news is that Republicans in your area will already know about the event, will expect it, and always attend. Tradition and fundraising make good music together. The bad news is that the price tag for such an event is many times traditional too. The \$20 chicken dinner that was a big fund-raiser for the party in 1970 may still be with us at the same ticket price, but much lower profit margins.

All in all, traditional or yearly events are the meat and potatoes of local party fundraising. If your organization does not hold an event like this, start a tradition today.

All events take time, work, planning, and organization. Despite the many advantages of holding an event, there are many potential pitfalls. First, an event takes time to plan and sell successfully. Second, the success of an event is dependent on your ticket-selling committee. And finally, the cost of an event can easily eat away at your anticipated profit. To counter the possible downside of fundraising events, you need to plan very carefully and stay on top of the progress of ticket sales.

Your imagination is the only limit to the number of different types of events. Before deciding what type of event you will hold, ask yourself these questions:

- How much money do you need to raise?
- Who will want to attend or buy tickets?
- Where will you hold the event?
- Who will help you sell the tickets for the event?
- Who will help you plan and execute the details of the event?
- What is the overhead cost of the event?

Special events are tricky to put together because they require tremendous coordination, a great deal of hard work, and good timing. What follows here is not an attempt to give you a definitive manual on special event fund-raising. However, some of the most significant and important points which need to be given consideration are as follows:

1. Appoint a dinner chairman, who in turn should select a ticket chairman. The latter individual should be in charge of organizing teams of ticket sellers, preferably composed of people who have a common bond, such as the same occupation or membership in the same trade association. Each team member should be required to make a weekly report to his "team captain", who should make a weekly report to the ticket chairman, and so on up, to keep track of over-all progress.
2. A good prospect list is essential. Names should be compiled from past purchasers of tickets, party town committee organizations, lists of friends and relatives of members of your organizations, lists of friends and relatives of members of your finance committee, office holders, appointed government officials and ranking employees, officers and members of Republican clubs, and any other prospect that comes to mind. The complete list should be assembled into groups of peers, and a ticket-selling team assigned each.
3. Consider the practical aspects of date, site and price. Try to choose a date that conflicts with a minimum of other political, civic, sports or vacation functions. Occasionally, it may be dictated by the availability of the speaker. Book a room that is neither too large nor too small for the event (remember, transportation facilities and overnight accommodations will be a factor to be considered in a large town). If your main purpose is to raise funds, you should probably price the tickets at a level as high as the traffic will bear. On the other hand, if generating favorable publicity or raising morale are more important, you may decide upon a lower priced ticket that will help attract larger crowds.
4. Send a preliminary mailing to prospective ticket buyers. A few days later a personal visit should be made by a member of the finance team. If, however, you don't have enough salespeople to make all of the necessary visits, confine the personal visits to the best prospects on the list and supplement by calling the remainder by telephone.
5. The speaker should be solicited months before the event. Ideally, he or she will be a person whose reputation or position will help stimulate ticket sales. When talking to a prospective speaker or member of his staff be sure to identify the organization you represent, the exact time, date, and place. Outline the highlights of your town committee, the issues that are prominent, and even topics that would be appropriate to mention in the guest's speech.

6. Press releases at various stages of the event should be issued and the editor or news director of each media outlet in your area should be sent an invitation and one or two complimentary tickets. Several days before the dinner, a follow-up telephone call should be made to remind them of the event, to determine whether anyone will be sent to cover it, and in connection with radio and television outlets, to learn whether they have any specific needs relating to wiring and lighting. Depending upon the number of reporters who are expected to attend, one or more media tables should be reserved close to the podium for good vantage point and acoustical quality. If available, advance copies of the speech should be ready for media release. They frequently result in more quotes being used and are highly recommended.

7. No detail is too small to overlook: directional signs, table signs, parking considerations, music, building and lobby marquees, table decorations, a check-in table, usher escorts. Such essentials are usually the purview of the arrangements chairman (if the dinner is lucky enough to find one), a role as important to the success of the dinner as that of the ticket chairman.

8. Vital, too, to the success of the evening is the master of ceremonies. Political considerations frequently will indicate that this should be the state chairman, town chairs, or another party dignitary. Fine, if he is an appropriate choice for the job — a lively and entertaining speaker. But the fact should be faced if that person isn't, and another choice made so the success of the function is not impaired and sales to future events are not prejudiced.

9. Form specific dollar goals. Know at the outset how many dollars you want to have the event generate in terms of net profit after all costs. One does this by careful estimation of all costs involved in the event and determining how many tickets one needs to sell in order to reach the goal.

10. It is important to develop a complete written a plan for the event. In doing so, such plan should include a time line for the event. This helps guide all those concerned by letting them know in advance what is expected of them and by what dates. The plan should be so complete as to include the entire budget for the event itself. No surprises are desired or anticipated when this kind of plan is put together and implemented.

11. Make sure that adequate thank you notes are sent to all participants.

## **General Fund-Raising Guidelines**

Every fund-raiser has his or her golden rules to live by. Here are some effective ones we have learned that work:

Rule #1: Ask. The best approach is the direct approach. Remember, the best way to get money is to ask for it - and the more people you ask, the more money you are going to get.

Rule #2: Plan. Take time to develop a written plan with goals and deadlines.

Rule #3: Ask for a specific amount - Tell potential contributors exactly how much you expect them to give. It's better to ask for \$50 and receive \$25 than to ask for \$25 when the donor might be willing to give \$50.

Rule #4: Make a second appeal. Give everybody the opportunity to contribute and once they have given, ask them to contribute again and again. Do this until they can no longer afford to give, or they have reached the legal limits.

Rule #5: Show a sense of urgency. Give everybody a sense of urgency and show need for the potential contributor's financial support. Be convincing and make them believe their contribution can make a difference in your town committee and in the future.

Rule #6: Diversity fund-raising techniques. Design your fund-raising efforts to complement your political, organizational and communication efforts. Developing a broad financial base is the key to your fund-raising success: Don't depend solely on one method, such as direct mail, to raise all the needed funds. A variety of approaches will bring the desired results and bolster each fundraising effort.

Rule #7: Research. The more you know about a potential donor, the more successful your fund-raising efforts will be.

Rule #8: Stick to proven methods. Design a fund-raising program by using proven methods that have worked in your area in the past. Be willing to try new tactics, but don't depend solely on unproved methods for your total result.

Rule #9: Get advice. Work with professional fund-raisers to develop an effective program for your political town committee. Do your research and design a program based on your political plan and strategy.

Rule #10: Know the law. Read and understand the requirements of your state, local, and federal election laws as they pertain to town committee finances. Above all else, obey these laws.

Rule #11: Always say thank you. If the contribution is \$200 or two dollars, always thank the contributor. Prompt acknowledgment and cordial appreciation will help develop a habit of regular giving among your contributors.

Rule # 12: Make your own contribution first. A candidate's contribution to his or her town committee shows the potential contributors and others that the candidate seriously believes he or she can win. Your own gift sets the pace for others to give. Don't expect people to give if you haven't.

## **EVENT CHECKLIST**

- 60) Speaker appearance date confirmed. Event site confirmed.
- 59) Dinner chairman named.
- 58) Publicity chairman named. Press release on event.
- 57) Tickets and/or order blanks to the printer.
- 56) Ticket sales chairman named.
- 55) Team captains appointed.
- 54) Team captains meet for prospecting, enlisting salesmen.
- 53) Arrangements chairman named.
- 52) Treasurer named. Press release announcing treasurer, any committee chairs, and team captains for the event.
- 51) Kick-off meeting with ticket salesmen/prospects assigned.
- 50) Special committee meets to handle table sales.
- 49) Out-of-city ticket sales system/chairman established.
- 48) Mailing to surrounding town leadership regarding event.
- 47) Treasurer sets up special bank account books.
- 46) Establish time-payment plan for deferred ticket payment.
- 45) Team captains meet to report, make assignments to new salesmen.
- 44) Press release and photo of team captains meeting.
- 43) Prospect file reviewed in light of sales.
- 42) All chairmen meet to ensure well-coordinated event.
- 41) Arrangements chairman carefully checks dinner site.

- 40) Arrangements chairman secures band, makes reception arrangements.
- 39) Out-of-city chairman develops prospect list.
- 38) Mailing to precinct chairmen about event, payment plan.
- 37) Team captains meet to report, make assignments to new salesmen.
- 36) Arrangements chairman visits with caterer for menu, beverages.
- 35) Prepare rough draft of dinner program.
- 34) Press release of speaker, biography, and photo.
- 33) Review work to date for whole event.
- 32) Publicity chairman prepares any additional advertisements.
- 31) Treasurer begins thank-you letters to ticket purchasers.
- 30) Out-of-city ticket sales chairman begins personal contacts, ticket sales.
- 29) Arrangements chairman plans physical arrangements, such as flowers and supplies. Orders these items.
- 28) Team captains recruit new salesmen from contributors list.
- 27) Ticket sellers meet for follow up.
- 26) Prospect file reviewed in light of new sales.
- 25) Publicity chairman begins work on press kits.
- 24) Review work done to date. Make first estimate of attendance and give to arrangements chairman.
- 23) Meeting of all chairmen to coordinate activities.
- 22) Publicity chairman places any advertising spots.
- 21) Arrangements chairman lines up head table, guests.
- 20) Team captains report. Assign prospects to new salesmen.

- 19) Invitations sent to special out-of-town guests.
- 18) Invitations sent to head table guests.
- 17) Invitations sent to key Republicans.
- 16) Ticket salesmen meet for final push.
- 15) Follow-up mailing to prospects who have not responded.
- 14) Press release regarding guests.
- 13) Head table guests confirmed.
- 12) Final draft of dinner program confirmed.
- 11) Master of ceremonies named.
- 10) Dinner program sent to the printer.
- 9) Speaker itinerary confirmed. Press release.
- 8) Will-call ticket system established.
- 7) Team captains meet for reports and final push.
- 6) Tickets and press kits furnished to the press.
- 5) Press release on ticket sales.
- 4) Arrangements chairman double-checks all arrangements.
- 3) Team captains telephone ticket sales total.
- 2) Make latest estimate of attendance.
- 1) **BLAST OFF! Handle last minute arrangements. Hold Event!**

## **POST-EVENT CHECKLIST**

- 1) Thank you letters to workers and late contributors.
- 2) Final collection of contributions.
- 3) Pay event-related bills.

## State of Connecticut Contribution Limits

<b>Contribution to:</b>	<b>Contribution from:</b>	<b>Limit:</b>
Candidate for Governor	Individual	\$2,500 per election
	Business PACs	\$5,000 per election
	Labor PACs	\$2,500 per election
	Special PACs	Unlimited
	Town Committees	Unlimited
	State Central Committee	Unlimited
Sec. of State, Comptroller, Treasurer, Attorney General	Individual	\$1,500 per election
	Business PACs	\$3,000 per election
	Labor PACs	\$1,500 per election
	Special PACs	Unlimited
	Town Committees	Unlimited
	State Central Committee	Unlimited
Candidate for State Senate	Individual	\$500 per election
	Business PACs	\$1,000 per election
	Labor PACs	\$500 per election
	Special PACs	Unlimited
	Town Committees	Unlimited
	State Central Committee	Unlimited
Candidates for State Rep.	Individual	\$250 per election
	Business PACs	\$500 per election
	Labor PACs	\$250 per election
	Special PACs	Unlimited
	Town Committees	Unlimited
	State Central Committee	Unlimited
Town Committees	Individuals	\$1,000 per year
	Business PACs	Unlimited
	Labor PACs	\$1,000 per year
	Special PACs	Unlimited
	State Central Committee	Unlimited
	Candidate for Chief Executive of a Municipality	Individual
Business PACs		\$1,000 per election
Labor PACs		\$1,000 per election
Special PACs		Unlimited
Town Committees		Unlimited
State Central Committee		Unlimited
Candidate for Other Municipal Office	Individual	\$250 per election
	Business PACs	\$250 per election
	Town Committee	Unlimited
	State Central Committee	Unlimited

Ad Books for candidates	Individual	\$50 per year
	PACs	\$ 50 per year
	Corporations	\$ 250 per year
State Central Committee	Individual	\$5,000 per year
	Labor PACs	\$5,000 per year
	Business PACs	Unlimited
	Special PACs	Unlimited

# **APPENDIX A**

## **STATE PARTY BYLAWS**

## **APPENDIX B**

# **SUGGESTED CACUS AND CONVENTION RULES AND PROCEDURES**

# **APPENDIX C**

## **STATE CENTRAL COMMITTEE**

# **APPENDIX D**

## **REPUBLICAN TOWN CHAIRMEN**

# **APPENDIX E**

## **REPUBLICAN STATE LEGISLATORS**