

**ADA Grassroots Action Team Network Resource Kit:
Working to Win – ADA Action Team Campaign Volunteer
Guide**

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I. Campaign Politics: Working for Your Lawmaker and Your Profession

As an ADA Action Team member, your most important task is to build a close, meaningful relationship with your own lawmakers that will help to promote dentistry's critical legislative issues. Participating in an election or re-election campaign is the best way to accomplish this task.

Former Senator Russell Long (LA) once said that the first goal of every lawmaker is to get re-elected, and the second goal is to never forget the first goal. Most candidates take a very personal view of their election efforts, because it is their careers that are at stake.

For many, even firmly established incumbents, campaigning is a way of life—a way to stay visible in their state or district and to remain in the good graces of voters. Needless to say, political campaigns are intense, high pressure activities that demand time, money and manpower. If you become involved, even in a small way, the candidate will notice and you will be well on your way to becoming a valued constituent and friend.

Why Volunteer?

Serving as a volunteer in your candidate's campaign can be beneficial on a number of levels.

Volunteering will help your candidate. Volunteers are the lifeblood of election campaigns. Candidates can only be in one place at a time, and their primary function is to meet and be seen by

voters. Candidates need volunteers to undertake the multitude of behind-the-

scenes tasks and activities necessary to win an election. That's why recruiting volunteers is a high priority for any campaign and your volunteer efforts will be much appreciated.

Volunteering will help your profession. Choosing a candidate who understands and is sympathetic to the needs and concerns of dentistry, and working to get him or her elected will solidify a strong base of support for dental issues in Congress or your state legislature. In addition, the relationship you develop with your candidate can open the door for future discussion of dentistry's issues when he or she is a lawmaker.

Volunteering will help your community and your country. We are fortunate to live in a country where we have the right to participate completely in the election of our own representatives. If we want to keep the spirit of democracy alive, and if we want to see our communities and our country continue to advance and improve, then we must play an active role by electing lawmakers whom we believe can do the job.

Successful campaigns build "armies" of volunteers and they recruit those armies as early as possible. A strong campaign effort that utilizes lots of volunteers can overcome other weaknesses, such as a smaller budget or less media coverage. Don't hesitate to get involved on behalf of your candidate and to recruit other dentists and dental families for the

campaign. Your help could make the difference between victory and defeat.

It is important to remember that truly effective volunteering requires a commitment of your time and your talents. As campaign veteran and former Chicago alderman Dick Simpson of Illinois claims, volunteer work "requires much more than an intellectual appreciation of the task to be done. It requires ringing doorbells and talking to people." Your goal is to get your candidate elected, and the following chapters in this guide will discuss different ways to participate.

II. The Critical Campaign Schedule

Time is a valuable, but limited resource in political campaigns. Hence, campaigns are driven by the calendar and deadlines. There is, for example, a filing date, a primary date, a final date for voter registration in every state, and of course, Election Day. Time must be used wisely in a campaign; it is critical for campaign organizers to develop a timeline of strategies and activities to be implemented and to follow that calendar as closely as possible. It will help ensure that volunteers, money and resources are allocated properly and will last to the end of the campaign.

Although campaign planning usually starts months, and sometimes years, before Election Day, the time of greatest activity-and the time when the most volunteers are needed-occurs two to three months before an election when it is critical to get the message to voters.

It is important for both campaign leaders and volunteers to recognize which election requires the most attention and

plan accordingly. Sometimes the real race for a candidate is not in the general election, but in the primary, which can occur anywhere from the early months of the election year to six weeks before the general election, depending on the state. Primaries determine the final slate of contestants in an election, and your candidate must run a campaign effective enough to survive the contest.

Additionally, the primary election may result in none of the candidates garnering enough votes to win. In such instances (and in rare cases in the general election), your candidate may need to continue fighting to win a run-off. Finally, if your candidate is running for an open seat, he or she may be unknown to most voters and need extra campaign time to get acquainted with them.

III. Inside the Campaign: Planning and Organization

The basic objective and sole aim of every campaign is to win the election – plain and simple. Everything that the candidate does, and everything that you do for a candidate, must be measured against one basic standard-will it produce votes for the candidate?

Good organizing and planning are imperative for any serious campaign. As Jeff Greenfield, author of *Running to Win*, puts it, "Political campaigns are a lot like bridge; they depend on the cards you were dealt and the way you play your hand." If organization and planning are your interests, don't wait until Labor Day to volunteer-strong campaigns start early.

There is no magic formula for a well-run campaign, no standard operating procedure to guarantee success. Campaign plans and strategies may differ greatly, but most have a similar structure and staff.

Basic Campaign Structure

A basic campaign organization consists of the following components, though in state and local races many of these functions may be performed by one person.

Unpaid Advisors

- **Campaign Chairman** — usually a close personal friend of the candidate who is well known in the community.
- **Advisory or Steering Committee** — composed of representatives of the candidate's primary constituent groups and of special experts; this committee identifies key issues of concern in the district and provides the campaign with up-to-date information on the changing climate of the campaign.
- **Finance Committee** — composed of volunteers who have fundraising and/or accounting experience.

Paid Staff Members

- **Campaign Manager** — responsible for planning and administering every campaign project, including planning the overall campaign strategy and supervising the campaign.
- **Finance Director** — the chief fundraiser for the campaign.

- **Research Director** — responsible for gathering data on subjects such as voting patterns, and profiling the opposition.

- **Scheduling Secretary and Advance Personnel** — can be filled by one person or by two or more people working closely together. the scheduler must have keen political judgment in order to arrange for the optimum use of the candidate's time. The advance personnel work on the details of the candidate's public appearances to be sure everything runs smoothly.

- **Volunteer Coordinator** — manages campaign volunteers. The major tasks include scheduling and supervising volunteers, assuring that individuals who want to work are assigned specific campaign tasks, and recognizing volunteer achievements.

- **Field Director** — coordinates field activity and implements campaign strategy.

- **Press Secretary** — in charge of all the campaign's communications with the media.

Paid Consultants

- **Media Consultant/Public Relations Director** — in charge of the entire campaign communications effort. The public relations director is responsible for "packaging" the campaign's master plan and "selling" it to the voters.

- **Legal Counsel** — important in making sure that petitions and legal requirements are met, including the filing of appropriate campaign finance reports.

- **Pollster** — responsible for coordinating all polling activities that give the campaign information needed to address voter perceptions and preferences, issue concerns and voting tendencies.

- **Direct Mail Consultant** — helps generate effective direct mail efforts.

- **Campaign Treasurer** — fills the campaign's accounting and record-keeping needs.

Depending upon the race, there are often two headquarters established in a campaign—one that is public and one that is private. a private office is established so that key staffers can work without interruptions. the public headquarters is the nerve center of all public campaign activities, and the work center for volunteers. It is also the center of communications and public relations for the campaign and is staffed by a full-time office manager.

Campaign Committees

Serving on a campaign committee is an effective way to be involved on behalf of your candidate.

Campaigns need groups of knowledgeable citizens to sit on committees to advise the candidate and his or her staff on key issues of concern in the area. Although committee work can be time consuming, it will ensure that you are part of the campaign's "inner circle."

As an Action Team member, there are two important committees where you can have maximum impact:

- **Finance Committee:** Every campaign needs a finance committee; it is generally considered to be the most critical, because it is responsible for raising the money necessary to win an election.

Since fundraising is the primary task of this committee, serving on it requires a significant personal contribution and a commitment to raising additional funds. As dentists, you and your fellow Action Team members have a great many contacts in the community and are especially well-suited to serve on this committee.

- **Health Advisory Committee:** With health care reform as a major issue of the 1990s, many campaigns are now forming health advisory committees comprised of medical professionals. As a health care provider, you are the right person to work on this committee and to provide your candidate with health-related advice and information.

Your candidate's campaign most likely has other committees, task forces and boards on which you, as a dentist and as a citizen, can participate. Contact the candidate, campaign manager or volunteer coordinator to let them know of your interest in serving. Remember, citizen committees not only help advise a candidate, they also make a candidate look more attractive to voters by showing that he or she is actively seeking input from "the people."

Volunteering at Headquarters

Even if you don't have the time to devote to a regular staff position or a campaign committee, you can still help your candidate's operation by working on one

or more of the multiple tasks at campaign headquarters. the public campaign office is always open, and volunteers are always needed to make and answer phone calls, stuff envelopes, respond to letters and questions, take notes, compile lists, and keep files in order. These things need to be done, especially during evenings and weekends; volunteers are essential and helping hands will be put to work!

IV. Communicating with Voters

While the internal workings of a campaign are critically important to its success, the ultimate goal is to make sure voters know about your candidate and go to the polls to vote for him or her on Election Day.

As campaign volunteers, one of the greatest contributions you and your Action Team members can make is to communicate to others that your candidate is the right choice and they should get out and vote!

Voter Identification

Before you can make personal contact with voters, you need to know who to contact. To win an election, the campaign must do its homework and determine:

- What voters to target;
- Where they are located;
- How many are needed to win the election;
- How to communicate with those voters.

Identifying and targeting voters are important facets of campaign strategy, because they define the groups and locations on which the campaign will concentrate its greatest activities.

Targeting ensures that you don't waste valuable resources on voters who will never support your candidate or who don't vote.

Your goal is to secure undecided votes and to reinforce positive votes. Identifying favorable, unfavorable and undecided voters requires a fair amount of research. this is the responsibility of the campaign staff, using lists and records from previous elections. You and your fellow Action Team members can help out by participating in campaign phone banks and/or by going door-to-door and gathering information from patients, friends, neighbors and other members of the community.

Voter Registration

In order to vote, you must be registered. That's why volunteering to conduct a voter registration drive is an outstanding way to make a contribution both to the political process and to your candidate's campaign. In every Congressional district, an average of about 26% of the voting age population is not registered to vote. if they actually registered and voted, they could change the outcome of an election.

You and your fellow Action Team members may choose to conduct a nonpartisan drive among the general public or concentrate on the dental families in your community. Regardless of whom you choose to target, your drive is subject to the laws of your state.

In most states, registration must take place at least 30 days before an election, although some states have deadlines closer to election day. Your Secretary of State's office can provide you with the information for your state.

There are certain basic steps that will help you to organize a successful drive:

- Target non-registered voters. If you are planning a drive among the general public, target groups that are most likely to need help with voter registration.

Studies show that minorities, young voters, the poor, the elderly, the disabled and foreign-born citizens are least likely to go to the polls. State and local election officials can provide you with voting information. In most places, registration and voting lists are public records available at election offices.

If you are planning a drive among dentists and their families in your area, your state or local society and the ADA Washington office can supply you with contact information.

- Target demographic groups likely to support your candidate. Work with your campaign staff and researchers to locate constituent groups who share interests and concerns with your candidate.
- Know your state's voter registration procedures and local practices in your community. Your state and local election officials and your chapter of the League of Women Voters can supply you with registration requirements in your area. In addition, you should be familiar with the National Voter Registration Act of 1993, more commonly referred to as the "motor voter" law. This law requires

states to make voter registration possible for citizens when they apply for or renew their drivers' licenses. The majority of states are now in compliance, with a few exceptions under special circumstances.

- Make sure you have the proper materials. Contact your state election official to get copies of the registration form and instructions on conducting your drive.
- Form a coalition with other groups in the community who support your candidate and conduct a registration drive together.
- Look for the best opportunities. Set up booths or tables in places where there are likely to be large numbers of citizens such as shopping centers, mass transit stations and stops, sporting events, and state or county fairs. Canvass door-to-door in areas where there are a number of unregistered voters. Remember to set up at dental meetings in your community as well.
- Consider setting up and operating a phone bank within the dental community to contact families with voter registration information. Follow-up by providing appropriate printed materials.
- Recruit other volunteers to help out — such as friends, neighbors, family members and members of the dental spouses' organization, the Alliance of the American Dental Association. They might be interested in volunteering in other facets of your candidate's campaign as well.
- Keep good, accurate records of the voters you register. You can visit these

new registrants again when you are campaigning for your candidate.

- Follow-up with new registrants who are supportive of your candidate and make sure that they do actually go out and vote on Election Day.
- Keep your registration drive nonpartisan. Your goal is not to campaign now, but to set the stage for later campaigning activities by making yourself a familiar and friendly face to the voters you register. Research shows that as many as 3/4 of the voters registered by a candidate's volunteers will vote for that candidate on Election Day, if follow-up contacts are made. It is essential that you keep your election officials informed of your activities; they can provide you with critical information and help ensure that your registration drive stays within the boundaries of the law.

You should also keep your state and local society and the ADA Washington office updated on your activities.

Delivering the Message

Once you have identified and registered your potential positive voters, it is time to deliver your candidate's message to them. Generally, the message is developed by the candidate and campaign leaders, and the strategy is to devise a general theme. The theme will focus on who the candidate is-his or her values, positions on particular issues, and why he or she is better than the opponent.

As every political or media consultant knows, a message needs to be delivered repeatedly — at least three times for it to

actually have an effect. Depending upon their finances, campaigns use direct mail and the media (paid and unpaid), including TV, radio, newspaper ads, public service announcements and press releases to deliver the message to voters.

Some larger, more intense or controversial campaigns may even have a TV or newspaper reporter assigned to them. Despite all the costly, high-tech strategies being developed, personal contact with voters is still the recognized way to win elections. Two of the most commonly used and cost-effective ways to do this are phone banks and canvassing-done by volunteers!

Telephone Banks

Telephone banks are used by political campaigns to:

- Introduce the candidate to voters whom he or she might not have a chance to meet in person;
- Raise campaign funds;
- Identify voters supportive of the candidate;
- Identify voter preferences;
- Identify key issues;
- Identify voters who need absentee ballots;
- Publicize special campaign events; and
- Get-out-the-vote.

The campaign staff will develop the message for the phone bank; as a volunteer, you can participate by:

- Managing the phone bank operation;
- Supervising phone bank shifts;
- Making phone calls at specific dates and times; and
- Mobilizing your fellow dentists and

Action Team members to help make calls to others in the community. Campaigns usually provide specific instructions for their phone banks, but here are some tips for making phone bank calls:

- Put a smile in your voice.
- Don't argue.
- Adhere to the campaign's message.
- Indicate voter response on the voter sheet. Make sure you do this carefully and accurately so your voter does not receive multiple calls.
- If there is no answer after five rings, call the next number on your list.
- If you are asked a question you cannot answer, inform the voter that you or someone from the campaign will call back with the answer. Be sure to verify the person's name and address, record the question and follow-up.
- If you are asked for transportation to the polls or for an absentee ballot, make a note of it and follow-up.
- Keep dialing! You should be able to make approximately 22 phone calls per hour. Phones on hooks lose elections.

Canvassing

Canvassing is an essential part of every campaign. Like phone banks, canvassing can help to identify favorable voters and/or unregistered voters, to recruit new campaign volunteers and to get-out-the vote, but it is most critical for promoting your candidate. A voter is much more likely to remember your candidate and read your literature if you have spoken to him or her in person and put the literature in his or her hand.

As a canvasser, you may be asked to work door-to-door in your neighborhood, to visit shopping malls or mass transit stations, or to accompany the candidate as he or she "walks the beat." Your first round of visits to voters could be a petition drive, to get enough signatures to get your candidate's name on the ballot. You may be asked to return again to learn the candidate's standing in the community. Finally, you will undoubtedly be asked to both deliver and display campaign literature, such as:

- Yard signs and/or window posters-to increase the candidate's name recognition and to show that citizens in the neighborhood support the candidate. Often special efforts are made to put them up in areas of the community where support is weak.
- Buttons and/or bumper stickers -- hundreds of people wearing buttons or displaying bumper stickers can be as effective as paid advertising.

- Brochures-to be mailed or handed out door-to-door that include complete information about the candidate and his or her background, experience, stand on the issues and groups of supporters.

While door-to-door is generally the preferred method of distributing campaign literature so volunteers can talk to the voters one-on-one, some campaigns also opt for literature "blitzes"-where volunteers leave campaign materials at the door.

Canvassing can be very hard work, but it is certainly worthwhile. Many people judge a candidate by the quality of people working for him or her. the key is to develop your own style, but be sure to include some basic elements. You'll want to:

- Introduce yourself and explain who you are representing;
- Hand out literature and describe the candidate's good qualities;
- Answer any questions the voter has, or promise to get the answer and follow-up;
- Ask if you can count on the voter's support for your candidate;
- Remind them of the date of the election and encourage them to get out and vote; and
- Thank the voter and leave courteously.

As with phone bank calling, you'll want to avoid arguments and lengthy conversations. if the voter says up front that he or she will not support your candidate, don't waste your time; you have other houses to visit. if the voter

wants to talk more, suggest that they call the campaign office or offer to have someone call them. Your most intensive canvassing will probably begin about three to four weeks before Election Day, when media coverage and voter interest is high (the election is right around the corner now.) Keep a careful and accurate list of voters who respond positively for your candidate and those who are undecided. This enables the campaign to compose good mailing lists and helps in planning follow-up activities to sway undecided voters and to get positive voters to the polls.

Raising Funds

Obviously, all of the resources and materials used in a campaign cost money. Many successful Congressional races have cost near or greater than \$1 million. While it is the principal responsibility of the finance committee to raise funds, volunteers like you and your Action Team members can contribute tremendously by planning a fundraiser on behalf of your candidate.

Fundraising events can be hosted either in or outside your home, and are limited only by your imagination and the candidate's schedule. of course, there are also certain legal requirements to be followed.

Remember that the objective of any political fundraising event is to raise the most amount of money for the least amount of work and expense. and also be aware that contributing money to a candidate's campaign-and getting others to contribute-is one of the quickest, most effective ways to build a solid relationship with him or her. It is a worthwhile undertaking.

For more information on conducting fund-raisers, consult your ADA Action Team Manual and ADA's guide "Hosting a Fundraiser in Your Home." Also, don't forget to consult ADPAC about support for your candidate.

Legal Considerations

As a volunteer, it is important to remember the laws governing federal election activities. As an individual, you may:

- Give up to \$2,300 to any federal candidate in any election, and up to \$5,000 per year to ADPAC. All federal contributions have a biennial (two year) limit of \$108,200 on total contributions to federal candidates and federal political committees combined. State laws and limits vary.
- Incur other types of expenses that do not count as contributions, such as:
 - Unreimbursed payments you made from your personal funds for usual and normal living expenses related to volunteer activity. This includes food and lodging but not travel.
 - Travel expenses on behalf of a candidate of up to \$1,000 per election, and on behalf of a political party of up to \$2,000 per year.
 - Unreimbursed costs of invitations, food and beverages in connection with candidate or party related events held in your home or in a church or community room. These

expenses, however, are limited to \$1,000 per candidate per election; and \$2,000 per year on behalf of a political party. (A husband and wife may each spend up to the limit.)

- The occasional, isolated, or incidental use of your dental office in connection with your volunteer activities. Your volunteer activities on behalf of a candidate or party must be undertaken during nonworking hours. However, incidental use of the facility, defined by law as one hour a week or four hours a month, is permitted. An example of incidental use may be using the telephone to make volunteer-related calls. Any additional amount of time will not be considered incidental activity and must be made up by the employee.
- Further information can be found in the Federal Election Commission's Citizens' Guide, available at: <http://www.fec.gov/pages/brochures/citizens.shtml>

Furthermore, any increase in the amount of overhead or operating costs which are attributable to the use of corporate facilities must be reimbursed to the company.

If you use your facilities to produce materials in connection with a campaign or to assist a candidate in fundraising, your practice must be reimbursed within a commercially reasonable time for the normal and usual charge for producing these materials in the commercial market. Among examples cited are:

phone calls, postage, couriers, cars and photocopying.

Additional guidelines for individual volunteer fundraising or other political activities:

- Be knowledgeable about state laws governing campaign activities at and nearby polling places, especially on Election Day.
- When fundraising for an event, invite people that you know personally.
- Remember, the activity is personal and not sponsored by ADA.
- Federal and most state election laws require disclaimers on fundraising invitations and reply cards. Be aware of what they are and be sure to include them.
- Use your own personal stationery or the campaign's stationery. Refrain from using a business return address. Type your own letters or ask the campaign to do it for you.
- Any RSVPs should be returned to the campaign, to your home address, or to a P.O. box.
- You must limit your political activities at the office to one hour per week or four hours per month.
- Make sure that your activities at the office do not create additional costs for the practice.

If you have questions about any aspect of your volunteer political activities, you should contact the ADA Washington Office or your constituent society.

V. The Final Hours: Getting Out the Vote on Election Day

The Final Hours: Getting Out the Vote

After months of work on a campaign, the final result depends on getting voters to the polls on Election Day. That is why "Get-Out-The-Vote" or GOTV activities are the last critical element in a well-run campaign. Again, volunteers are the ones who carry out the multitude of activities that end only when the polls close. GOTV programs are not one day affairs; they should begin at least 30 to 60 days before Election Day, and be incorporated into all the other campaigning activities-voter identification, voter registration, rallies, speeches, advertising phone banks, and canvassing. Within a week or two of the election, many campaigns shift entirely to GOTV activities. Starting early ensures that you have enough time to contact voters to remind them to vote, to make special arrangements for them to vote, such as arranging for child care or transportation, and to get absentee ballots to positive voters who will not be able to go to the polls on Election Day.

Pre-Election Day Activities

- Contact other dentists personally and encourage them to go out and vote for your candidate. You should also enlist the help of your local society to help spread the word.
- Contact new voters. Visit the voters that you registered in your registration

drive — either by phone or in person—and remind them to vote.

- Distribute information. Contact your local election officials and obtain information about the locations and hours of polling places, directions and parking at polling sites, and requirements for absentee voting. Mail them to positive voters, hand them out door-to-door or distribute them at the same sites where you registered voters.

- Set up a phone bank especially for GOTV. Have a call-in number for people who need assistance, transportation or child care on Election Day. Make the necessary arrangements and verify them with voters the day before the election.

- Visit positive voters door-to-door the day before the election to give them a leaflet or candidate endorsement and remind them to vote. Leave materials at the door or in the mailbox of those who are not home.

- Consider a final blitz of posters or signs on main streets, at polling places and other heavy traffic areas. Repetition will make people remember the election and your candidate.

Election Day Activities

Campaigns recruit as many volunteers as possible to conduct both GOTV activities on Election Day (as many as one-third of an area's voters will forget to go to the polls if they are not reminded and/or assisted) or campaigning activities. on Election Day, you and your colleagues may be asked to:

- Put up posters near polling places and distribute leaflets endorsing your candidate.

- Canvass door-to-door to remind favorable voters to go to the polls and vote for your candidate, especially during the mid-day hours when activity at the polls slows down.

- Set up a phone bank to contact positive voters, remind them of polling hours and encourage them to vote for your candidate.

- Assist favorable voters in getting to the polls, either by providing transportation, child-care, or other assistance to the elderly or those with disabilities.

- Answer questions at the polling place, explaining voting procedures and helping voters who may be at the wrong polling place.

- Poll-watch to make sure that election laws are properly observed and to determine who has not voted. (You will most likely need special training for this and should contact local election officials to find out requirements). Every state has specific rules and requirements governing the activities allowed at or near the polls on Election Day. You should be sure to contact your state or local election officials well before undertaking Election Day activities.

Conclusion

It takes all of the activities described in this guide-plus a large dose of patience, persistence and commitment-to make a successful campaign. You and your Action Team should meet and determine what kinds of volunteer activities you wish to undertake as a team, as well as

individuals. Recruiting other dentists, dental families and members of the Alliance of the American Dental Association is always a good idea, too.

Bear in mind that campaigns are frequently frenetic and disorganized. Often there is no one to sit down and train you for what you have to do-on-the-job training is the way many volunteers learn the ropes.

Enlist the help of experienced campaigners to help show you the way; if you do have campaign experience, lend a hand to other newcomers. Above all, don't hide your talents... campaigns are always seeking new and creative ways to attract voters. Look for activities that will allow you to use your skills and your contacts to the fullest.

Candidates remember the commitment of dedicated volunteers, and often reward that commitment with a strong, open and lasting relationship. By volunteering for a candidate favorable to dentistry, you will be doing a true service to your fellow dentists by helping build greater representation on the issues that affect our profession, our practices, our patients and our communities.