

The Democratic Party of Wisconsin  
and Arena present:

# CAMPAIGN ACADEMY 2020

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**Democratic National Convention**

August 17 - 20, 2020

# Welcome to Campaign Academy 2020!

We are so glad that you are here. We're ready to roll up our sleeves and get Democrats elected in November.

In a year marked by social distancing, we cannot lose sight of the opportunity to organize for the change we want to see. That's why we've created a collective space for first-time volunteers and veteran Democratic Party activists alike to come together to learn and get to work.

We hope that this training leaves you energized and empowered to help Democratic candidates up and down the ballot in your community

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# Table of Contents

<b>Introduction</b>	<b>4</b>
<b>Who We Are</b>	<b>6</b>
<b>How to Use this Workbook</b>	<b>8</b>
<b>Training Agenda</b>	<b>9</b>
<b>Campaign Basics</b>	<b>14</b>
<b>Social Identity Worksheet</b>	<b>17</b>
<b>Foundations of Electoral Organizing</b>	<b>20</b>
<b>The Hard Ask</b>	<b>23</b>
<b>Principles of Persuasion</b>	<b>28</b>
<b>Turnout Conversations</b>	<b>32</b>
<b>Digital Organizing &amp; Storytelling</b>	<b>35</b>
<b>Glossary of Terms</b>	<b>40</b>

# Introduction

This 4-day training series, brought to you by the Democratic Party of Wisconsin and Arena will train party activists and volunteers (that's you!) to effectively support 2020 campaigns and state parties.

This training is designed to draw back the curtain on how and why campaigns make decisions so you can identify the most valuable way to support local and national races. We've partnered with leaders in the field with decades of campaign expertise to provide the skills you need to hit the ground running. With this in mind, we've set some big goals for this training.

## Training Goals & Norms

**Each session will incorporate goals from the following. At the end of the training series, you will be able to:**

- Communicate the structure, organization, and phases of campaigns in order to conceptualize how and where to support campaign efforts.
- Understand data-driven components of campaigns including organizing goals and win numbers.
- Analyze models of volunteer teams and leadership, particularly in a remote and distributed environment.
- Apply principles of relational organizing and relational outreach to organizing and campaigns.
- Recognize unconscious bias, how we all have it, and how we can disrupt, dismantle, and debias systems of oppression.
- Dissect how to make Democratic volunteer spaces more equitable, inclusive, and culturally aware.
- Practice crafting and amplifying stories, messages, and asks online.

- Understand the digital tools on campaigns and how to tailor content to asks and audience.
- Understand the basics of campaign fundraising.
- Make an effective hard ask, in the context of fundraising and organizing.

### Norms:

- Respect. Empower. Include. If you've been around campaigns, you might have heard this before. We know that everyday people can organize for extraordinary results.
- Be present. It is challenging to concentrate while learning online (hello the whole internet is at your fingertips)... but we believe in you!
- Be curious. Always be asking, "why?"

**Respect.**  
**Empower.**  
**Include.**



## The Democratic Party of Wisconsin and Arena

# Who We Are



### The Democratic Party of Wisconsin

The Democratic Party of Wisconsin has effectively established the COVID-19 campaign playbook for Democrats nationwide. [As the New York Times wrote](#) in the aftermath of the spring election, “Look to Wisconsin for lessons on a digital campaign during a pandemic.” They have shown Democrats that what works on the doors also works online by reaching out millions of times through phone calls, text messages, and social media channels to help Wisconsinites cast safe absentee ballots from their homes, shifting their entire voter outreach program on the turn of a dime.

With Wisconsin having the potential to swing the electoral college and legislative Republicans being three seats shy of veto-overriding supermajorities in each chamber

-- thanks to egregious GOP gerrymandering -- the work we do in Wisconsin this cycle is incredibly important and will have an impact for generations to come.

Visit the [Wisconsin Democrats website](#) to learn more.

### Arena

Arena convenes, trains, and supports the next generation of candidates and campaign staff. Since its inception in 2016, Arena has built a robust suite of resources and trainings to create a progressive talent pipeline with the tools, skills, and networks needed to win in 2020.

Arena’s talent pipeline begins with [Arena Academy](#). To date, Arena Academy has trained over 1,100 aspiring campaign managers, organizing directors, organizers, data and analytics directors, digital

directors, finance directors, and communications directors from 38 states and Washington D.C. 65% of Arena trainees are women or gender nonbinary and 55% are people of color. More than 300 Arena grads have been placed on 2020 positions, 63% of which are active campaigns on the national, state, and local levels.

The second part of the talent pipeline is [Arena Careers](#), a one-stop platform for progressive job seekers and progressive organizations to search, connect, and hire for priority positions.

Finally, Arena provides just-in-time campaign solutions with [Arena Toolbox](#), a suite of free tools and templates that have been viewed more than 100,000 times.

Visit the [Arena website](#) to learn more.

# Meet Our Training Partners



## How To Use This Workbook

# It's up to you to make the most of these opportunities.

During Campaign Academy 2020 and the Democratic National Convention, you'll be given opportunities to develop your skills to be a powerful campaign volunteer. Whether this is your first time volunteering on a campaign, or you are a veteran of Democratic campaign offices, our goal is that these four days arm you with the skills, knowledge, and confidence you need to apply your learning, show up, and give your time to local and national races on the Democratic ticket in 2020.

To participate fully in this training series, this workbook will prompt you to define your own key takeaways and work through activities. In this workbook, you'll find session worksheets and a glossary of key terms to help guide you through the training concepts.

Finally, you have so many people on this journey with you. Use [#VolunteersWin](#) on Twitter, Facebook, and Instagram to share out your learning with your digital community.

We are grateful to have you in this work.





August 17–20, 2020

# Campaign Academy Agenda

## Day 1: Campaign Fundamentals

### Mon. August 17

The first day of this four-day training series, we will cover the fundamentals of Democratic campaigns: how they are structured, how data and research informs tactics and strategies, and what we can do to create more inclusive, equitable, and Democratic campaign spaces.

## Day 2: Organizing

### Tue. August 18

Day two of this four-day training is all about organizing. Democrats need to organize in order to persuade, register, and turnout all the voters we need to win in November. Join us for individual sessions or for a full day to walk you through the most important tactics and strategies to organize in 2020.

## Day 3: Digital

### Wed. August 19

Day three of Campaign Academy 2020 will take you through everything you need to know to campaign online. We'll cover storytelling, digital organizing, texting, and fundraising. Consider yourself a digital expert if you attend all five digital sessions.

## Day 4: Highlights

### Thu. August 20

Missed a session from one of the other days of Campaign Academy 2020? No worries! We'll repeat some of the most popular sessions from the previous days and go over campaign fundamentals, organizing, and digital.

## Monday, August 17 | Day 1: Campaign Fundamentals

Time (CDT) / Session	Trainers	Session Description
<b>11:00am - 12:00pm</b> <b>Demystifying Campaigns</b>	<b>Emmy Ruiz</b>	Ever wondered how campaigns are structured and managed? We'll walk you through the fundamentals of campaigns, from who is involved to the different phases of a campaign.
<i>Break (15 minutes)</i>		
<b>12:15pm - 1:45pm</b> <b>Diversity, Equity, and Inclusion: What's the Difference and Why it Matters</b>	<b>Dr. Kira Hudson Banks</b>	What do "White Supremacy," "unconscious bias," and YOU have in common? They all shape U.S. politics. Join if you want to understand these and related concepts, and to learn what you can do to disrupt, dismantle, and debias.
<i>Break (45 minutes)</i>		
<b>2:30pm - 3:30pm</b> <b>Campaign Data</b>	<b>Santiago Martinez</b> <b>Catherine Tarsney</b> <b>AJ Kahle</b>	We all know that campaigns need 50% +1 of the votes to win. But how do we come up with that number? And how do campaigns think about who they will need to persuade, turnout, and register to vote? Join us for a session on campaign data to understand what goes into a campaign's win number and pathway to victory.
<i>Break (15 minutes)</i>		
<b>3:45pm - 5:00pm</b> <b>Political Research: Understanding Scripts &amp; Organizing Tactics with the Analyst Institute</b>	<b>Mary Bogus</b>	Since 2007, the Analyst Institute has partnered with progressive organizations and campaigns to measure the efficacy and impact of political organizing tactics and paid media strategies. During this session, the Analyst Institute will share some of their findings, which will help us understand why campaigns use the organizing tactics they do (texts, phone calls, canvassing) and why certain language and messaging works to persuade and turnout voters.
<i>Break (15 minutes)</i>		
<b>5:15pm - 6:00pm</b> <b>Finding Volunteer Opportunities on Campaigns</b>	<b>Ashley Arnold</b> <b>Ashley Williams</b> <b>Gabriella Stasson</b> <b>Manny Ávila</b>	There are many opportunities to get involved in the 2020 election both locally and nationally. In this session, we'll help you identify how you can employ your unique skills, interests, and passions to volunteer on a campaign and where you can go to connect with local organizers and national campaigns.



## Tuesday, August 18 | Day 2: Organizing

Time (CDT) / Session	Trainers	Session Description
<b>11:00am - 12:00pm</b> <b>Foundations of Electoral Organizing</b>	Luis Ávila	Organizing has a long and rich history in the United States. From worker campaigns to civil rights movements to issue advocacy, organizing is the idea that everyday people can come together to create change. This session will take us through the trajectory of organizing to help understand how and why campaigns use organizing to win.
<i>Break (15 minutes)</i>		
<b>12:15pm - 1:15pm</b> <b>The Hard Ask</b>	Sara El-Amine	Core to organizing is the hard ask: a specific, unapologetic ask of a neighbor, voter, or friend to volunteer on our campaign, contribute to our cause, or vote for our candidate. In this training, we'll understand a framework for making a hard ask, when to ask, and we'll practice how to do it.
<i>Break (45 minutes)</i>		
<b>2:00pm - 2:45pm</b> <b>Distributed Organizing Teams &amp; Relational Tactics</b>	Deanna Reed Shante Wolfe	We all know that 2020 will change the way that campaigns are able to interact with and reach voters and volunteers. In this session, we'll learn how to structure and manage distributed organizing teams. We'll also understand relational organizing tactics, and how to leverage personal relationships to expand our outreach.
<b>2:45pm - 3:45pm</b> <b>Principles of Persuasion Conversations</b>	Aquiles Damirón-Alcántara	Have you ever tried to change someone's mind? What is it like to have a conversation with someone who has wildly different opinions than you? In this training, we'll understand the foundations of how to have persuasion conversations and how we might get started changing someone's perspective.
<i>Break (15 minutes)</i>		
<b>4:00pm - 4:45pm</b> <b>Get Out the VOTE (by mail)</b>	Sean A. Floyd Anna Surrey	The final phase of campaigns is called Get Out The Vote (GOTV). In this session, we'll understand how to mobilize voters to the polls and—especially in 2020—how to have conversations with voters about registering to vote by mail and returning vote by mail ballots.
<i>Break (15 minutes)</i>		
<b>5:00pm - 6:30pm</b> <b>Cultural Competency &amp; Virtual Campaigning with INCLUSV</b>	Alida García, Inklusv Malik Hubbard, Inklusv Panelists	There are key states to winning in 2020, and it is vital that we elevate the unique experiences and issues facing voters of color in battleground states. This training with partner Inklusv seeks to increase our personal contextual awareness outside of the script and the list to have meaningful and respectful contact with voters of color.



## Wednesday, August 19 | Day 3: Digital

Time (CDT) / Session	Trainers	Session Description
11:00am - 11:45pm <b>Digital Strategy</b>	Christina Lewis Betsy Hoover	Emails, texts, social media, digital ads—there are so many ways to reach voters where they are: Online. This training will deep dive into how campaigns think about and deploy digital strategies to reach out to voters, volunteers, and donors to ask for our votes, our opinions, out money, and our time as volunteers.
11:45pm - 12:45pm <b>Digital Organizing</b>	Lauren Krupp Salim Zymet	How do we mobilize people online to take action? Digital organizing explores how volunteers can turn a click or like into an action or a vote.
<i>Break (45 minutes)</i>		
1:30pm - 2:45pm <b>Digital Storytelling</b>	Anastasia Golovashkina	Social media has made it easy for us to share and create stories from everyday life. Those stories can help others understand why you support a candidate, how to get involved, or what we can do to affect meaningful change this year. In this training, we'll learn from the best about how to effectively communicate our stories online.
2:45pm - 3:30pm <b>Peer to Peer Texting</b>	Spencer Neiman Heather Schmucker	Want to send texts for your candidate? In this training, we'll deep dive into the thinking and strategy behind peer-to-peer texting campaigns. We'll walk through best practices for texting so that you can show up on day one ready to use any platform on any campaign.
<i>Break (15 minutes)</i>		
3:45pm - 5:00pm <b>Digital Fundraising</b>	Clarke Humphrey Bhavik Lathia	In this training, we'll understand the principles of how campaigns raise money online through email, ads, and social media. And, we'll understand what we can do as grassroots donors to help with these efforts and take back our government from the pockets of the billionaires and millionaires one \$5 donation at a time.



## Thursday, August 20 | Day 4: Highlights

Time (CDT) / Session	Trainers	Session Description
11:00am - 12:00pm <b>Demystifying Campaigns</b>	<b>Cristina Calvillo-Rivera</b>	Ever wondered how campaigns are structured and managed? We'll walk you through the fundamentals of campaigns, from who is involved to the different phases of a campaign.
12:00pm - 12:45pm <b>Finding Volunteer Opportunities on Campaigns</b>	<b>Ashley Arnold Bhavana Kodira Manny Ávila Gabiella Stasson</b>	There are many opportunities to get involved in the 2020 election both locally and nationally. In this session, we'll help you identify how you can employ your unique skills, interests, and passions to volunteer on a campaign and where you can go to connect with local organizers and national campaigns.
<i>Break (45 minutes)</i>		
1:30pm - 2:15pm <b>Distributed Organizing Teams &amp; Relational Tactics</b>	<b>Heba Mohammad Lucia Nuñez</b>	We all know that 2020 will change the way that campaigns are able to interact with and reach voters and volunteers. In this session, we'll learn how to structure and manage distributed organizing teams. We'll also understand relational organizing tactics, and how to leverage personal relationships to expand our outreach.
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# Opening Reflections

As we begin, take a few moments for yourself to reflect on what you'd like to get out of this experience.

1. What are my personal goals for participating in this training?

2. What do I have to contribute to the 2020 election cycle?

3. What core values do I have that call me to organizing?

4. Here are my big questions as I enter this training:

## Basics of Campaign Strategy

# Message, Mobilization and Money

**At the core of Democratic campaign strategy are three pillars. These are the three M's:**

**Message.** A winning campaign message should be real, relevant, and resonant. It should reflect the candidate's values—and therefore our Democratic values, too. This message will be adapted to different audiences and broadcast over all the channels available to campaigns: television, radio, mail, digital platforms, events, volunteers talking to voters, and voters talking to friends and family. Person-to-person communication is the most effective way to spread our candidate's message to persuade and turn out other voters.

**Mobilization.** How will we organize Democrats to take action and to vote? Mobilization is all about how we get voters to the polls (or turning in mail ballots) and also how we mobilize our volunteers and supporters to take action to support the campaign.

**Money.** All of the above relies on having funding to spread the campaign's message and to move voters to take action. Campaigns rely on grassroots fundraising to be able to hire staff, communicate with voters, and support local Democratic infrastructure.

# Three phases of a campaign

Phases are defined by the audiences we are targeting & engaging at different times.

Winter

Spring

Summer

Fall

E-Day

## CAPACITY BUILDING

- Raising money
- Recruiting volunteers
- Hiring/building teams
- Training teams

## PERSUASION

- Increasing name recognition
- Talking to voters about issues important to them
- Identifying persuadable voters

## TURNOUT

- Making sure all the voters we persuaded and our base turn out to vote
- Mobilizing and energizing voters



**Some aspects  
of identity are  
visible and  
others are  
unseen.**

# Social Identity Exercise

This exercise encourages you to reflect on your social identity group membership across dimensions of diversity and your related experiences. Group membership can be self-defined as well as ascribed by others. For example, race is often self-claimed but can also be ascribed by the government, school, or employer. Sexual orientation is an example of an identity grouping that is not visible.

## Examples

Below are some examples of self-proclaimed and ascribed identity groupings. The list is not exhaustive, but please use these prompts as a place to begin your self-reflection on the grid on the next page. Feel free to use language and descriptors that are comfortable for you.

- **Gender:** Man, Woman, Transgender, Nonconforming, Nonbinary, Fluid
- **Race:** Asian/Pacific American, Native American, Arab American, Latino/a/x, African American, Black, Bi/Multiracial
- **Ethnicity:** Chinese, Puerto Rican, Italian, Blackfoot, Jewish
- **Sexual Orientation:** Lesbian, Gay, Bisexual, Heterosexual
- **Religion:** Hindu, Muslim, Buddhist, Jewish, Christian, Agnostic, Atheist
- **Class:** Poor, Working Class, Lower Middle-Class, Upper-Middle Class
- **Age:** Child, Young Adult, Middle-Aged, Elderly
- **Ability:** Temporarily able-bodied, Person with disabilities (e.g., physical, emotional, cognitive)
- **Nations of Origin & Citizenship:** United States, Korea, Turkey
- **Political Affiliation:** Democratic, Republican, Libertarian
- **Communication Style:** In/Direct, Expressive, Closed

## Definitions

- **Target Group:** an identity group that is disenfranchised and marginalized
- **Agent Group:** an identity group that is granted systematic privilege in society

Used in 2020 session conducted by Kira Hudson Banks, PhD. [kirabanks.com](http://kirabanks.com)

# Identity Profile

## How do you identify?

*Which are you most aware of?*

*Which do you think least about?*

*Which would you like to know more about?*

*Which have the strongest effect on how you see yourself?*

*Which have the greatest effect on how others see you (positive/negative)?*

*Which give you power and privilege in society?*

*Which represent your greatest growth edge?*

	<i>Which are you most aware of?</i>	<i>Which do you think least about?</i>	<i>Which would you like to know more about?</i>	<i>Which have the strongest effect on how you see yourself?</i>	<i>Which have the greatest effect on how others see you (positive/negative)?</i>	<i>Which give you power and privilege in society?</i>	<i>Which represent your greatest growth edge?</i>
<b>Gender</b>							
<b>Race</b>							
<b>Ethnicity</b>							
<b>Sexual Orientation</b>							
<b>Religion</b>							
<b>Social Class</b>							
<b>Age</b>							
<b>Ability</b>							
<b>Nation(s) of Origin</b>							
<b>Nation(s) of Citizenship</b>							
<b>Political Affiliations</b>							
<b>Communication Style</b>							
<b>Other</b>							

# The Foundations of Electoral Organizing

Organizing for change has a long history in the United States. From the labor movement and the formation of unions, to civil rights movement and coordinated efforts to dismantle systems of oppression and demand equal rights for Black and brown people in this country, organizing is a powerful tool of grassroots movements.

At its core, organizing is the idea that people can come together to make change. This could be organizing to form a union, organizing to change policing, or organizing to elect a candidate. Organizing often relies on the work of organizers—both grassroots and staff organizers—to formulate a strategy and implement it in the local context.

Marshall Ganz, a scholar of organizing and social movements, describes: “Organizers work with people to interpret *why* they should act to change their world—motivation—and *how* they can act to change—strategy.”

Organizing begins with uncovering why we should take action. This “why” is personal to each individual. Campaigns also share a collective “why.”

Once we understand why, we need to think about how we will win. In order to win a campaign, we need a strategy. On electoral campaigns, this strategy centers around how to achieve our “win number,” the number of votes needed to win the election. National campaigns need to translate that strategy locally to add up to the right number of votes from each precinct, neighborhood, and district. That’s why volunteers are the heart-beat of all electoral campaigns.

Organizing uses tactics to build power and form connections between voters, volunteers, and members. Campaign events, canvasses, phone banks, texting are all tactics that help us have more one-on-one conversations with voters to communicate why we support our candidate and what action we need to take in order to win (vote, volunteer, donate, or request a ballot).

In 2008, Barack Obama’s campaign changed the way we organize national electoral campaigns. Using a neighborhood team model, his campaign organized precinct captain and volunteer teams to take responsibility for the campaign’s success in their precincts and neighborhoods.

Today, we use many different volunteer models on campaigns. Distributed organizing teams and neighborhood teams are responsible for reaching out to voters both locally and around the country.

**Our democracy  
only works  
when it is truly  
representative  
of the people.**

By organizing on electoral campaigns, we amplify the voices of those of us who make up the Democratic Party. We add our personal touch to help other voters understand why they should support a candidate or how they can get involved. Our democracy only works when it is truly representative of the people and that means we need to come together to work for the change we want to see.

# Foundations of Organizing

Organizers identify, recruit, and develop leaders. They understand we cannot do this work alone; it takes a team... that's you!

→ **Key mindset:**  
**Organizing is the idea that when we work together, we can achieve big things and what we achieve is ours.**

## The power of organizing on campaigns:

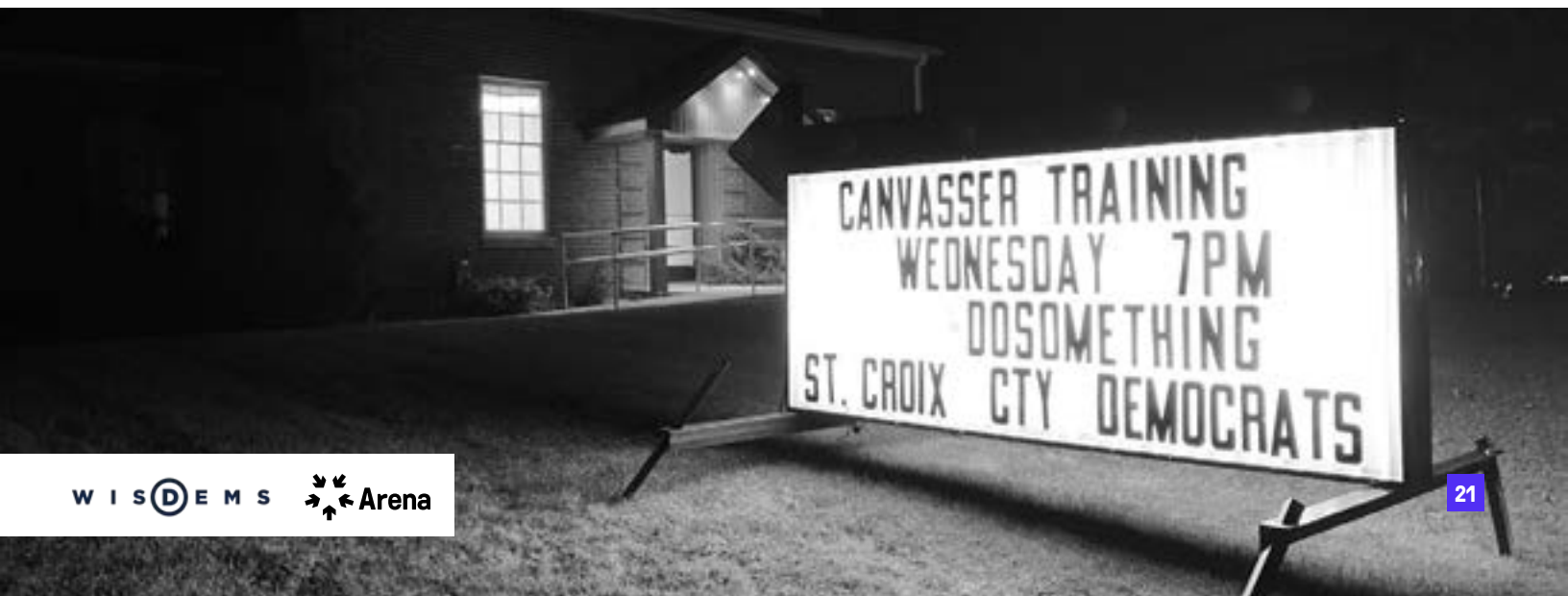
- People are the most powerful messengers
- The campaign knows the goals, but you know your communities best
- This is our Democratic Party and our government
- We are working towards a clear, finite deadline: November 3, 2020

## What organizing does:

- Brings us closer to our vote goal
- Transmits our candidate's message directly to voters through conversations
- Multiplies our capacity
- Empowers local communities and local messengers
- Builds lasting Democratic infrastructure

## The role of organizing this year:

- **Disseminate** trusted information
- **Spread** messages quickly
- **Build** community (and mutual aid efforts!)



## Session Notes

### Reflection Questions

**1. Why is it important to elect Democrats up and down the ballot this year in general?**

**2. Why is it personally important to you to win this year? Think specifically. Is there someone you're fighting for? Or something you are passionate about accomplishing? Try to think positively about what you stand *for* rather than *against*.**

**3. Why is it important to get involved as a volunteer?**

# The Hard Ask

The Hard Ask is a specific, unapologetic, defined ask of a volunteer or voter.



# The Hard Ask

## Framework

- **Introduction** – Use elements of your personal story and motivations to volunteer
- **Connection** – Identify with their values.
- **Action** – What action can they take to solve the campaign win?
- **Urgency** – Why is it important now?
- **Commitment** – Ask for a specific commitment.
- **Follow up** – What are the next steps?

**1. Brainstorm: When do we make a hard ask on a campaign?**

**2. Reflection: What do you personally find the most intimidating about making a hard ask?**

## Session Notes:



## Practice writing your own hard ask

**1. Introduction: Who are you? Why are you calling/talking to this person?**

**2. Connection: Who you are talking to? What are their values?**

**3. Action: What can they do to help the campaign win? What do you need to accomplish? How will that help you win?**

**4. Urgency: Why do you need to do it now?**

**5. Commitment: Ask for their commitment to take action.**

**6. Follow up: Summarize your next steps.**

# Principles of Persuasion



# Principles of Persuasion

Through Persuasion Conversations, volunteers move voters from an undecided or unsupportive position to a position of support. These conversations also give us the opportunity to motivate people to take action. Effective persuasion is essential to winning an election.

→ **Key mindset: We need to listen first if we're going to persuade someone.**

## Active listening principles

To have effective persuasion conversations, we have to listen.

- Suspend judgment
- Stay focused
- Repeat back what you've heard
- Ask clarifying questions
- Let the voter direct the conversation

## Common challenges to active listening:

- **Focus** – Losing focus on the speaker, drifting off
- **Judgment** – Thinking about our internal commentary and evaluation of the speaker
- **Rehearsal** – Working on our next comment
- **Assumptions** – Assuming we understood based on our own lived experiences

## Framework:

### Persuasion Conversations

- **Listen** – Take time to listen to what the voter thinks about an issue
- **Acknowledge** – You don't have to agree with everything a voter says, but you can use key phrases to show you are hearing their point of view
- **Relate** – Find opportunities to relate your personal story to the voter's story or issues
- **Connect** – Always bring the conversation back to the core message of your campaign
- **Contrast** – We don't need to be negative, but we do need to find opportunities to highlight differences

**1. Brainstorm: What goes into having good conversations with voters?**

**2. Reflection: What will you need to practice to have effective persuasion conversation?**

**3. Reflection: What are common challenges you personally encounter to active listening? What active listening principle are you going to practice?**

## Session Notes

## Having effective persuasion conversations takes practice. Work through this exercise to practice your skills!

Before practicing the script, take a minute to think about and write down an issue that is important to you this year as a voter in section 1 below. You'll use this in the script. Have a real conversation with someone you know and trust (this person is your partner in this exercise). Share your issue and listen for theirs. Write down answers in sections 2 and 3 below. Read through the script once on your own, inserting the information you've written down. Practice the script out loud putting together all the pieces. Ask for feedback (and listen)!

### 1. What issue matters most to you most this year? Why?

### 2. Listen, Acknowledge and Relate — Making the voter feel heard

Really listen to what your partner is saying and empathize. Maintain eye contact, validate any emotion or big points they are making by confirming that you heard them. Ask clarifying questions as needed to keep learning more about the value or issue. When your partner is done, summarize what was important to them. Write the following information:

**My partner / the voter's issue is:**

**This issue is important to my partner because:**

**This issue is also important to me because / As someone who:**

### 3. Connect: How does this issue connect to your campaign?

Once you have made your partner (the voter) feel heard, connect what they care about back to your campaign.

**My campaign takes this stance on the issue/will do this when elected:**

### 4. Feedback: What areas do I need to practice in this framework?



# Persuasion Script

## → Introduce

Hi, is *[Name]* home? I'm your neighbor, \_\_\_ and I'm out talking to voters in the community today about the upcoming election. How's your *[current day]* going?

*Note: Keep all conversations local and be personable. Your demeanor can define the conversation. Asking how someone's Tuesday is going is great way to encourage dialogue from the beginning.*

## → Break the ice

Great! As a *[how you identify yourself: Parent/Student /Teacher]*, I'm supporting Joe Biden because he's fighting to restore the soul of this nation and rebuild the backbone of America, whether it's better schools, more affordable health care or better-paying jobs.

*Note: Use identifiers that reflect those of the voters you're talking to.*

## → Inquire & Listen

Are you planning to support **Joe Biden for President?**

*If Undecided or Unsupportive:*

I understand! The election is still a ways out and the decision is ultimately up to you. **Could you tell me what issue matters most to you this year?**

*Note: Always be understanding and remind voters that who they decide to vote for is their choice. Let the voter lead with the issue that matters most to them.*

## → Acknowledge & Relate

As someone who *[engage with voter issue]*, I know how important that is.

*Example:* "As someone who also feels fearful for my family's ability to make ends meet at a time like this..."

*Note: Acknowledge and relate. Using the line, "As someone who" can be a great way to relate to the voter.*

## → Connect

*Note: Connect the issue back to the candidate and your shared values with the voter.*

When I think about people who understand what that's like, I think of Joe. Joe Biden has spent his entire career fighting for everyday Americans in the Senate and as the Vice President. He wants to unify this country, so we can find solutions that move our families forward.

## → Ask for Support

Now that you know a little more about Joe Biden — **can we count on your support?**

*Notes: Always ask again for support. Usually, you won't change someone's mind with one conversation, but multiple "Touches" can have an impact.*

# Turnout Conversations

Through Turnout conversations, volunteers mobilize and energize voters to cast their vote. As soon as voters start casting their ballots—and just before—our campaign adapts to accomplish one primary goal: Turn all our supporters out to vote! Campaigns specifically focus on voters that are likely to support our candidate but who might not vote without outreach.

**Turn all of  
our supporters  
out to vote!**





## Turnout Conversations

→ **Key mindset: Turnout conversations convert support into votes, either by absentee ballot, early voting or Election Day voting.**

### Turnout Phase

- Is a time when campaigns go from having many priorities to one big priority: turnout
- Starts when voting starts in our state (Early Vote, Vote by Mail, etc.)
- Makes sure all the voters we persuaded turn out to vote
- Mobilizes and energizes voters to turn in ballots

### In the turnout phase, we have conversations that help us:

- Remind someone to vote
- Empower them to turnout others in their community
- Create a plan to vote

### What do we say to voters?

- **Make a plan to vote** by asking for details about where, when, how, and with whom they will vote or mail in their ballot. The more details you ask for, the better someone will remember
- **Express urgency** by repeating dates and deadlines for when they need to vote
- **Apply social pressure** to demonstrate that many people are voting and voting is a collective experience! Social pressure means demonstrating that many people are voting, and that voting rolls are public
- **Thank them for being a voter**  
This helps reinforce an identity of being someone who votes.

**Brainstorm: What goes into having good turnout conversations with voters?**

**Reflection: What will you need to practice to have effective persuasion.**

## Turnout Script

# Sample GOTV Script

### → Introduce

Hi, my name is \_\_\_\_ and I'm a volunteer with *[Candidate's]* campaign. Is *[Name]* available?

*Note: Keep all conversations local and be personable. Your demeanor can define the conversation. Asking how someone's Tuesday is going is a great way to encourage dialogue from the beginning.*

### → Inquire & Inform

Hi, *[Name]*! Voting in *[State]* begins on *[Date]*. Do you know who you will be supporting this year?

***If they are supporting or leaning your candidate:***

That's great! Thank you for your support! One of the reasons I'm supporting our candidate is *[tell your reason or story]*.

We are encouraging all our supporters to make their voices heard as early as possible to build momentum. You are a big part of that. Are you planning to vote early or by mail?

***If yes:***

We're suggesting that voters turn in their ballots at least two weeks before Election Day, which is on November 3. We need you to turn in your ballot as soon as possible. Have

you received your ballot in the mail yet?

***Mail Ballot Requested/Received:***

Do you plan to mail your ballot in, or will you return it to a drop box? *[Make a plan with them on how and when they're going to turn in their ballot]*. Thank you so much for being a voter. Have a great day!

***Ballot Returned:***

Thank you so much for being a voter. Could you commit to reminding three family members or friends to also vote?

***If NOT voting by mail:***

You can find your polling place at *[refer them to the Secretary of State or wherever they can find this information]*. Polls are open from *[Poll Hours]*. Do you know what time you'll be able to vote? *[Make a plan with them on how and when they're going to go to the polls]*. Thank you so much for being a voter. Have a great day!

***If they are not supporting/not open to supporting your candidate:***

Thank you! Have a great day.



# Digital Organizing & Storytelling



# Digital Organizing

Through digital organizing, volunteers can create community, increase efficiency, identify and recruit additional volunteers, and tell the story of our campaign and your volunteer work online.

→ **Key mindset: Digital is the thing that connects us all. It should not be an afterthought.**

## The power of digital organizing

- Drives the campaign narrative
- Builds an active community of support
- Mobilizes volunteers to take action
- Helps us talk directly to voters
- Scales our efforts quickly

## Key principles of digital organizing

- **Authenticity of voice** – Write like you are talking to someone you know and make sure you are sharing trusted resources/
- **Relevance** – When you are online, you are plugging into conversations that are already happening: Meet the moment.
- **Impact** – Give people in your digital community opportunities to take action and make a difference.

## Before, During and After Online Organizing Events

- Recruit from your networks and communities online
- Create an inclusive environment during your event
- Follow up with photos to show the work you did and recruit more volunteers

**Digital organizing uses digital media platforms and tools to do voter contact and win the election.**

## Session Notes

### Reflection Questions

1. Which social media platforms are you active on?
2. What ideas do you have for how to reach other volunteers and voters online?
3. What messages do you see resonating with your social network?
4. How would you craft a call to action to your networks?

# Digital Storytelling

Through digital storytelling, volunteers can create a personal narrative, connected to the campaign, that builds momentum, puts the campaign in a local context, and shows the power being built by supporters. At its core, digital storytelling is the human voice of the campaign, communicated online.

→ **Key mindset: Storytelling is building momentum for the campaign. Your voice adds profound meaning to what the campaign is putting out digitally.**

## The power of digital storytelling

- Candidate awareness
- Persuasion
- Amplifying grassroots power
- Mobilizing volunteers & voters
- Fundraising

## Digital storytelling best practices

- Add your story, voice, and experience to what the campaign is sharing online
- Share how issues impact you and your community to put the campaign into a local context
- Tell the story of your organizing in an accessible and meaningful way (you've got people watching to see if this is something they can do too!)
- Lift up the voices of the people you are working and fighting for

## Before you share information, check it:

- **Source:** Is this a trusted source of information?
- **Headline:** Headlines don't always tell the full story. Always read to the end before you share.
- **Analyze:** Analyze the facts. If something sounds unbelievable, it very well might be.
- **Retouched:** Watch out for misleading pictures and videos in stories. They might be edited, or show an unrelated place or event.

## When you are thinking about sharing, keep this in mind:

If you think it's misleading, don't amplify it. That only increases its popularity in feeds. To ensure we're sharing the right content, WHO we are sharing is as important as WHAT we're sharing.

## Session Notes

### Reflection Questions

1. Who is in your audience and online community?
2. Where do you and your audience spend time online?
3. What stories will resonate with you and your community?
4. Where can you add your own story, motivations, perspective?

## Glossary of Organizing Terms

Use this glossary to understand terms you might hear as you volunteer (we know there can be a lot of jargon). We hope the definitions in this glossary will help you to build your campaign volunteer vocabulary and successfully navigate a world where “universe” refers to a list of voters, and not the cosmos.

- **BASE VOTE** – The base vote refers to the voters who will turn out for a specific party. Mobilizing base voters is crucial to a campaign because they are most likely to vote for you/your candidate and will encourage others to do the same.
- **CANVASSING** – An effort to contact and speak directly to a list of targeted voters. Canvassing is used almost exclusively to refer to knocking on doors.
- **CONTACTS** – Refers to conversations held between targeted voters and the campaign (usually at the door or on the phone). This term “contact” is often used interchangeably with “conversation” or “touch.”
- **DAY OF ACTION** – A day on the campaign during which volunteers are organized to take collective action (such as house meetings, canvasses, phone banks, text banks) en masse across the district, state, or Country.
- **DIALER (PREDICTIVE DIALER)** – Software that automatically dials through a phone list, connecting only with live callers (skipping answering machines, busy signals, and disconnected numbers), used to accelerate passes through a phone universe. Rates for this service vary, and some training of volunteers is required before use. The average dialer will triple your contact rates.
- **DIRECT VOTER CONTACT** – Attempts by the campaign to directly reach or engage voters. Direct Voter Contact tactics include face-to-face conversations (usually at the door), phone conversations, text messaging, and mail.
- **DRY RUN** – A scheduled GOTV practice, usually in the last weeks leading up to the election, where reporting systems, Staging Locations, and volunteer leadership are tested.
- **EARNED MEDIA** – Free media or press that is “earned” by the campaign, rather than paid advertising. For example, campaigns may choose to put together events in order to attract press who will cover a particular story or narrative.
- **PAID MEDIA** – Paid Media refers to TV commercials or digital ads paid for by a campaign or an outside group.
- **GOTV** – An acronym that stands for “Get Out The Vote”; the final weeks or days of the campaign in which the entire focus of the campaign is turning out supporters to vote for the candidate.
- **GOTV UNIVERSE** – The list of voters your campaign has targeted for engagement during GOTV. It will include your identified supporters, as well as those with relatively high support but relatively low turnout propensity.



## Glossary of Organizing Terms Continued

- **NEIGHBORHOOD TEAM LEADER** — A committed volunteer who is empowered to run the campaign’s direct voter contact operations in their neighborhood. This person usually manages other volunteer leaders, such as Canvass Captains, Phone Bank Captains, and Data Captains.
- **PERSUADABLE VOTERS** — Refers to voters who the campaign will target and attempt to persuade to vote for the candidate. Typically, this term is used to refer to voters who are somewhat likely to turnout to vote but are currently undecided or do not have a strong partisan identity.
- **PERSUASION** — In campaigns, persuasion consists of targeting undecided voters or voters who have soft support for one candidate and persuading them to vote for you in the election, essentially moving them from undecided to decided.
- **SHIFT** — Refers to the amount of time a volunteer should commit to volunteering when they sign up. During GOTV, these are typically three-four hours in length. Notably, this is different than the number of volunteers recruited, as volunteers can (and should!) complete multiple shifts. Because measuring shifts is how capacity is calculated, this term will be used frequently in a variety of ways.
- **SMS** — Better known as text messaging, SMS is a good term to add to your campaign dictionary. People are increasingly turning to mobile phones to communicate, so tapping into this social engagement is important for your campaign. SMS’s have an increasingly high click-through rate and a higher rate of engagement that can be tapped into on a campaign.
- **SNOWFLAKE MODEL** — A distributed leadership model used to organize communities in labor movements, advocacy efforts, and electoral campaigns. The Snowflake Model was adopted as “The Neighborhood Team Model” on President Obama’s campaign in 2008, with the help of organizer Marshall Ganz, and has been used widely by Democratic campaigns since. It is called the “Snowflake Model” because when you draw it as an organizational chart, it looks like a snowflake.
- **SPORADIC VOTERS** — People who are registered to vote but only occasionally turn out to vote; this term is sometimes used interchangeably with the term “drop off voters”—people who tend to vote in Presidential elections but not in Midterm or local elections.
- **STAGING LOCATION** — A place (either in-person or online) where people will gather before and after voter contact activities. Most often this term is used to describe a physical location where volunteers gather during GOTV to be closest to the voters they’re trying to reach. A staging location can be a Zoom Room or a private home, park, school, or any other location that allows your group to gather and train or debrief.
- **SURROGATE** — A campaign surrogate is a term used to describe a person who acts on the behalf of a candidate running for some sort of political office. The campaign surrogate often appears at public events that the candidate cannot make it to, or may simply appear to bolster the image of the candidate in a certain demographic. An influential or well-known person—often an elected official, celebrity, or local civic leader are examples of a surrogate.

## Glossary of Organizing Terms Continued

- **SWING VOTER** – Unlike base voters, swing voters are not loyal to a candidate just based off of party lines. These voters are important during your campaign because they can make or break meeting your vote goal and winning the election.
- **TURNOUT** – Refers to the voters showing up to cast their ballots. For example, if one says “turnout is high,” they mean that a high number of registered voters have cast their ballots (in person and/or by mail).
- **UNIVERSE** – A list of voters or people who the campaign has targeted for engagement. The campaign has a universe for direct voter contact (door, phone, text conversations, mail), and also for paid media (TV, digital ads).
- **VIRTUAL PHONE BANK (VPB)** – An online call tool arranged by the campaign so that volunteers can call and speak to their targets from anywhere. Most often this is arranged through VAN, so that a script is provided, and data is entered immediately by the caller.
- **VOTER FILE** – A database of all registered voters in the state, that includes their publicly available data (usually address, phone number, gender, date of birth).

