

Introduction

Recently, political analysts have focused on the impact of the Internet on campaigns. In addition to the Internet, there have been many other technological advances that have made campaigns more effective and better able to organize administrative operations, target voters, raise money and communicate.

The very nature of technology is fluid. With technologies and advances arriving daily, much of what is outlined here will be obsolete in months, weeks, days and even hours. It is important to recognize these limitations when making choices regarding which technologies are best suited for your campaign. What will not change, however, are the basic questions and self-assessment that must be made when selecting the appropriate technologies needed to maximize the limited resources available to any campaign.

CHAPTER ONE

Technology Selection

Every campaign aims to maximize the way it organizes, raises money and communicates with supporters and voters. Technology helps campaigns move faster and more efficiently, reaching a wider audience and increasing the time available to respond to attacks.

Remember that technology, as glamorous as it can be, is not lightning in a bottle. When developing a strategy you must make choices focused on which technology best serves the campaign, and not which technology is most exciting and innovative at the time. Choices must be informed and complement the objectives set forth in the campaign plan. If the campaign does not have goal-oriented communication, fundraising and voter contact strategies, no amount of technology will produce a win.

When purchasing and implementing technology, ask — does the technology positively impact administrative, communication, fundraising or voter contact operations?



Use technology to complement your plan, not vice versa. Technology is only useful in a campaign when it makes your task simpler and more efficient.

Campaigns are always pressed for time and are often inclined to set up operations without taking time to plan properly. This means that critical questions are often never asked or answered. Campaigns later pay for these early missteps with precious resources. Glitches that could have been prevented with adequate, early planning must be repaired in the heat of battle, wasting both time and money. Whether selecting a phone system for the office or a database to track donations, the penalty for not reflecting on which technology is best suited has the potential to unnecessarily disrupt the campaign midway through or even to force the campaign to scrap an entire system and start from scratch.

Questions to Ask when Choosing Technology

Ask these questions when evaluating whether specific technologies are worthy investments.

What is the Actual Cost of the Technology?

Many campaigns make the mistake of taking a vendor's initial cost at face value. Campaigns should assess technology costs in aggregate as well as with a detailed cash-flow analysis. How will costs fluctuate throughout the campaign? Are costs dependent on volume? Are there hidden costs? These are critical questions when assessing the effectiveness of the technology and will help to maintain the overall campaign budget.

Sometimes you have to pay for better quality, so remember that the cheapest bid is not always the best. Request bids from various vendors to compare prices. Each bid must be reviewed in detail with the vendor before purchase.

Is the Technology Reliable?

Reliability in the midst of a fast-paced campaign is vital. Technology must stand up to high-volume use and must be dependable in a crisis. Demand a clear support system with the vendor. How reliable and accessible are the professionals who support the technology? Will they be available on a weekday evening when the copier breaks down while printing flyers? Can the campaign contact the administrator on a weekend morning when the server crashes? All campaigns have faced these crises and often find themselves losing precious time, waiting until the next business day, when help is available.

It is important to test the system and product before purchase. Ask the vendor if the campaign can test the copier for a week before signing the contract. If the campaign is purchasing software, ask for a test account to try the product.

Always remember to check references for vendors. If the campaign is considering a vendor who does not have political experience, negotiate a lower price.



What is the Scale of the Campaign? What Volume Will Need to be Handled? Can the Technology Grow with the Campaign?

The issue of scalability is crucial. Technology has failed in important moments because it was not set up to grow and change with the pace and volume of the campaign. When purchasing and implementing technologies, plan for the future scale and volume of the campaign. How many employees will be on staff at headquarters versus in the field? What is the volume of long-distance versus local calls? How many e-mails will the campaign send at one time and over the course of the campaign?

For instance, imagine that a campaign faces a sudden surge in online contributions after receiving a key endorsement. At the peak of giving, the server crashes because it is not able to handle this sudden increase in activity. Your campaign has the potential to suffer tremendous losses because of a mere technical error.

All the servers, merchant accounts and Web platforms must be able to handle high volume – from the slowest to the busiest day on the campaign. If possible, test the system under game conditions and check references that have used the product under real circumstances.

Talk to other campaigns of a similar size which have used a vendor's technology. While you're at it, ask them about what other sorts of technology they have considered or tried, and what worked and what didn't. A conversation with someone who has used the technology in real life will prove a lot more valuable to you than reading out of a brochure.

When campaigns are successful on- or off-line, the campaign's technology must be ready to deal with an avalanche of activity — the phone system must hold up, the network must handle increased activity and the online technology must be capable of growth. The campaign must have technology that is reliable, scalable and consistent or it will lose time and eventually political support.

What is the Level of Security?

In late 2003, it was revealed that Republican staff of the Senate Judiciary Committee had penetrated the network of the Democratic staff, taken confidential internal memos and released them to the press. Even the technological security of the United States Senate can be breached.

Technology is not perfect, so the campaign must seriously consider all security issues when choosing a vendor. When setting up a network, phone system, public Web site or even voter file, the campaign must demand that its technology is secure and cannot be hacked or infiltrated.

What is the Interdependency of the Technology?

Many technologies are now offered in bundled packages or are dependent on each other. Is the phone system tied to the fax lines or with the Internet connection or cable television? Choosing a cable modem Internet could affect the cost of cable television service. Assessing the interdependency of the technology can answer real financial and efficiency questions.

What is the Time Frame?

This is a vexing question for most campaigns, which will rarely operate for longer than nine months to a year. When does the technology have to be running at full capacity? Is the campaign building technology for temporary use or will it be permanent? Most campaigns that will exist six months or less will run cables along ceilings and floors and make similar structural sacrifices. State parties and party committees that are permanent are not willing to make these accommodations.

What Resources Will the Campaign Dedicate to Solving Technology Problems?

Is the campaign willing to assign full-time staff to work with technology or only willing to accept the help-line or support staff provided by the vendor? Many campaigns will decide that when it comes to a phone system, copier or fax machine, having a full-time person on staff is not worthwhile and will instead rely on a service contract provided upon purchase. However, some campaigns decide that having a full-time person to address the needs of network hardware and software is worthwhile, especially when faced with the possibility of a computer glitch when no support staff is available. These decisions are based on a simple cost-benefit analysis, and vary greatly depending on the size of the campaign.

Will the Technology Solve Problems or Help the Campaign Meet its Goals?

After addressing all these questions, the campaign must decide if the technology makes the campaign work more efficiently. If the answer is yes, then it is a worthwhile investment. This is especially true in office administration, communications, fundraising and voter contact.

CHAPTER TWO

Administrative Operations

When a campaign begins, important decisions have to be made about the way the office is set up.

Phone Systems

The size and scope of the phone systems must be based on estimated volume. Plan for growth. Smaller campaigns may choose to have direct phone lines, but larger campaigns will want to have a main switchboard to take all incoming calls with outbound lines for phone banks. As always, there are different options available. The phone company can set up the system, but will often charge every time a transfer is made within the system or every time lines are added. Another option is to purchase a main line switch so that the campaign can control the process of adding and changing lines.

Most telecommunications services can be purchased in bundles with one company, as well as á la carte from separate providers. Be smart when pricing the costs for local and long-distance service, mobile phones, teleconferencing and dedicated fax lines, as well as wireless technology for computers.

Understand clearly the interdependency between phone lines, the Internet and possible connections to cable television. Some telecommunications companies sell fiber lines, which are useful when transmitting video and audio files. This can be important if your campaign has purchased television ads or is planning on sending feeds to media.



You have dozens of choices when it comes to telecommunications providers. Be careful and selective in considering your options.

Computers and Networks

Setting up a network is again based on expected scale and volume. This includes computer hardware, desktops, laptops and all peripherals including printers, scanners and wireless devices that sync to computers, such as PDAs and Blackberries. A network professional should work with the campaign to identify the proper off-the-shelf software which includes personal e-mail, word processing, spreadsheets and databases.

Internet

The campaign needs to have a 24/7 Internet connection. In order to do this, you must sign up with an Internet Service Provider, or ISP. There are three basic options: cable modem, which goes over the cable television line; DSL, which goes over the phone line; or frame relay, which requires a dedicated fiber optic cable. All operate around the clock.

Many campaigns want the flexibility of having wireless Internet in the office, which can be helpful to traveling staff and consultants. Be aware, however, that this is a security risk if attached to the network Internet connection. Individuals in the vicinity of the wireless signal can break into the network. If the campaign is considering a wireless connection in addition to a traditional connection, it might be worthwhile to consider purchasing the wireless connection separate from the traditional Internet connection so they are separated for security purposes. Staff traveling with laptops can buy relatively inexpensive wireless cards, which will allow them to purchase Internet time in places like hotels and cafes.

Before you get too excited about a new technological investment, consider who will be using it and to what extent.



Remote Access

Many campaigns implement remote access to e-mail and the network through a virtual private network, or VPN. This allows staff in the field to access the campaign's network for e-mail and, in more advanced programs, the network in full. Campaigns choose this option over Intranet and Extranet because of the size, scope and the number of staff who need access to the network while in the field.

Intranet and Extranet

Access to individual and content databases is available through the Intranet and Extranet as well. The Intranet is a Web-based technology that distributes information and gives database access to everyone who is at headquarters. Extranet is a Web-based technology used to access databases from outside the network. Because the Extranet is accessed from a remote location, additional security is necessary. Often, consultants and field staff in satellite offices use the Extranet.

The Intranet and Extranet can serve as an office management and staff distribution list. In addition to the database, they can provide staff with office administrative documents (such as reimbursement and compliance forms) as well as communication, fundraising and voter contact materials across a district, state or the country. Identify the needs of the campaign and work with the Web designer to identify the best solution for the campaign.



When working with the Web designer, ensure that the campaign has the functionality to easily post to the Intranet and Extranet.

Faxing and Copying

Every campaign needs basic hardware such as a fax and copier. The most important decision is whether to buy or lease these machines, based on the level of support provided and the cost to the campaign over time. Often the monthly lease fee in addition to the cost of technical support may be more than purchasing a previously-owned machine. When it comes to the fax machine, consult a technical adviser because often these can be used as printers as well and linked to the network.

Databases

A database that is well-designed and well-maintained is the cornerstone of every campaign. It must be completely integrated with your internal and external Web sites and allow for easy access by staff, consultants and other individuals who use such campaign information.

The optimal database is Web-based and connected to tools that make it functional for the campaign. The benefits of a Web-based system are discussed in detail later. Whether Web-based or not, the database must be connected to the network so that everyone can access the database from their desktops based on tiered access according to their function and responsibility within the campaign.

Database Access

All databases must be readily accessible to the staff both at headquarters and in the field. Decisions must be made as to how much access to give other individuals who are associated with the campaign. For instance, the communications director may want to give members of the media password-protected access to the content database to search through issues papers, press releases and speeches. The campaign manager may choose to give consultants access as well, and some campaigns give donors access to password-protected content and data. There are as many options for giving access to the database as there are campaigns.

Before the campaign is in full swing, designate someone who will be in charge of designating access to different areas of the database. Make sure everyone knows who the point-person is.

Donor, Supporter and Voter Databases

This database is comprised of the voter file as well as people involved in the campaign including supporters, activists and donors. The campaign should make a strategic decision about whether or not these universes belong in one unified database or separate databases for each group. In most cases (except for national or California-based campaigns, where the voter files themselves are incredibly large), all these individuals could be combined into one database. This allows for a unified database where all campaign contacts can be queried and communicated with together or separately to allow for custom reports in all areas. There is power in data integration.

A good database will allow the campaign to determine who can have access to specific types of data, which will enable private information to remain closely guarded when necessary.

However, many campaigns choose to keep donors, supporters and the voter file separately. If a campaign chooses to separate these databases, it should ensure that each database is compatible with the others and that all tools, including reporting queries and bulk e-mail, work across all databases.



Content Database

A campaign should have a database of all the content created for that campaign, including documentation, issue papers, press releases, rapid response, speeches and other substantive content. This database must be accessible in Web-based form so that all members of the campaign, including consultants, can access the database, search by key word or run a query. This is helpful for staff searching for answers to voters' questions, the mail consultant who needs to find a source for a mail piece or the communications director who is searching for a quote from the candidate.

Financial Reporting

If the donor database is created correctly, the mechanism for financial reporting — producing the campaign finance reports as required by federal, state or municipal law — will be created simultaneously. The correct information required by law must be able to be downloaded in the proper format. There are many off-the-shelf software programs that can be used to prepare financial reporting in cooperation with a campaign's database, while some campaigns choose to create their own financial reporting programs. These decisions are based on the size and scope of a campaign's donor base. In addition, the compliance regulations and legal requirements applicable to your campaign must be taken into account when making decisions about financial reporting technology.

CHAPTER THREE

Public Web Sites

The use of the Internet is one of the most rapidly changing and least understood aspects of political campaigning. In 1992, the Internet was a little-known tool for scientists and academics. In 1996, presidential campaigns developed Web sites that had little strategic value. By the end of 1998, there was dramatic growth in both the number of campaigns using the Internet as well as the number of voters who considered the Internet an important source of political information. Over the past six years, we have witnessed a handful of statewide and federal candidates using the medium strategically as a tool to communicate with voters, organize and raise money.

In previous years, it was not necessary for every campaign to have a Web site, because there were so few voters online. Many Web sites catered to a tech-savvy audience. This, however, has changed dramatically over the years. Now, 63 percent of American adults are online. Campaigns, from municipal to federal, are expected to have a Web site. Web strategy is no longer focused on the tech savvy users, but targeted and designed for a broad audience.



A public Web site provides a rare opportunity to deliver the campaign's message obstacle-free.

Depending on the budget, the campaign may or may not hire a professional Web designer to build and maintain the Web site. When making this decision, it is critical that the campaign set goals. For example, will the Web site purely be a presence for the campaign or does the campaign want to fully integrate communication, fundraising and voter contact operations on the ground with the virtual world? Decisions need to be made about whether or not to hire a professional who will provide technical advice.

It is critical to make sure that the entire Internet budget is not spent on design and construction. As a general rule, half of the budget should be set aside for design and construction, with the other half designated to underwrite the costs associated with growth, maintenance and service fees.

Be Master of Your Own Domain

Buy the Web Site Domain Name Early

At this point, everyone has probably heard the stories of candidates who waited too long to buy their domain name and found themselves responding to individuals who owned the names and demanded large payments in exchange for the rights to these sites. Even worse, some opponents purchase all the versions of a potential candidate domain name and fill them with attacks. Buy the campaign domain name early or risk bearing the consequences of someone else purchasing it.

Buy All Versions Including .com, .net and .org

Do not be content with purchasing www.johndoe.com — purchase www.johndoe.net, www.johndoe.org, www.johndoe2004.com, www.johndoe2004.net, www.johndoe2004.org, www.johndoe04.com.

Make this your first priority so you can prevent an opponent from purchasing these domains. All the domain names that the campaign purchases can automatically link, or mask, to the main URL, so that whichever name someone types in will take them to the campaign's Web site.

Buy All Potential Opponents' Domain Names

For the same reason the campaign buys its own domain names early, the campaign should purchase all versions of the opponent's domain names. Never ask an opponent or an opponent's supporters to pay for these domain names. It will backfire politically and garner bad press. Depending on resources, the campaign can choose to leave the Web sites under construction or use them as a method to highlight the opponent's record. For instance, www.bush-cheney.net is clearly not owned by the Bush-Cheney campaign and has been used by its owner to attack the positions of the Bush-Cheney administration.



There are many locations, or registrars, that sell domain names from \$35 to \$200 each. Registrars include www.register.com, www.networksolutions.com and www.buydomains.com. Names typically cost about \$35 per year, but other sites offer them for higher or lower prices depending on the length of time that the name will be owned by the buyer.

Web Site Strategy

Incorporating the Message Into the Web Site

Now that all types of voters have access to the Internet, campaigns must be conscious to coordinate what is happening on the ground to what is happening virtually. Seventy-five percent of what is happening online should reflect what is happening off-line. Web sites should reflect the campaign's message and field operations, as well as earned and paid media.

Most Web sites include the following basic content sections: About the Candidate, Position on the Issues, Press Releases, Breaking News, How to Make a Contribution, How to Volunteer and Contact Us. The site can grow from there.

Launch Site as Early as Possible

It must be a priority to put the Web site up early, since this is the fastest and purest way to deliver a campaign's message. It will help you raise money, both by soliciting donors at events and on the phone, and build an e-mail list of the supporters.

Many campaigns make the mistake of postponing the launch of the Web site until all content is complete. Instead, put the site up in phases. Additional information can always be included later.

Always Promote the Web Site

Use every possible opportunity to draw traffic to the Web site. Make sure that the candidate mentions the URL in public speech. Make sure all printed materials drive people to the Web site. Include the Web site on all banners and podium signs, so that when photos or video are distributed, the URL is in clear view. Use traditional media, including direct mail, radio and television, to drive traffic to the Web site.

Register the Web site with the major search engines so that the Web site pops up when individuals do basic word searches in Yahoo!, Lycos and Google. Most designers do this as they construct the Web site. Note that some search engines allow campaigns to select search words that would result in the Web site popping up as a search result.

Issue and Parody Sites

Larger candidate and referendum campaigns use these sites with much success. If the opponent's domain names have been purchased, your campaign can use them to expose the opponent's record. This is a rapid response tool and illustrates the differences between the campaigns. The campaign can create a stand-alone issue Web site to highlight the issues as well. At first glance, www.bush2004.com appears to be the official Bush 2004 Web site, but a closer look reveals Bush's real record on key issues. www.grandoldpetroleum.com chronicles Republican attachment to special oil interests. Who owns the Web site is a matter of public record, so be extremely cautious and fact-check all information before it is posted.

Provide a Clear Method to Sign Up for E-mail Updates

A Web site is the best way to build a campaign's e-mail list. Make signing up for e-mail updates as easy as possible for anyone who visits the Web site. Every page on the Web site should have the option to sign up as a supporter. Pop-ups are sometimes an efficient way to ask supporters to join the e mail list, but some just find this to be a distraction. The only way to determine if they are right for your site is to test them for actual click-throughs to the sign-up page and actual sign-ups made from the pop-up.

Make Donating Easy

Making a donation must be easy and crystal clear on every page of the Web site. Campaigns have found that using pop-ups can be an effective way to raise money. Once supporters have shared their e-mail address, pop-up windows thank them for their support and urge them to make a donation. Once again, it is important to test the results of these pop-ups and make sure that they are not perceived as a distraction. The donation page must be easy to navigate and should not require too many clicks to actually contribute. Test the page heavily before going live.

Secure Contributions

Provide donors with the most secure means possible of making a contribution. Work with the designer to ensure that the donation page and forms have the highest degree of security. Do this in conjunction with setting up the campaign's privacy policy.

Develop A Content Management Program

The Web site is perfectly suited to deliver the campaign's message, including traditional issue areas, rapid response and documentation for commercials and debates. The content management program the campaign and the designer agree on is important. There must be functionality in the Web site. Again, can staff update the Web site in-house with ease?

A content management system is a tool that enables a campaign to add, delete and edit content on the Web site in-house, instead of sending all content to an HTML-proficient coder to post to the site. HTML is easy to learn — often, one can be trained in a day. However, most content management programs do not require HTML programming. In fact, staff can basically cut and paste content to the Web site as if working in a basic word processing program.

The person responsible for posting content does not have to be a technical genius. They must, however, be at the table when campaign strategy is decided and be senior enough to get sign-off on content quickly from the communication and research directors. Gone are the days when the Webmaster could be the candidate's college-age kid.

Update Site Regularly

The only effective way to keep individuals coming back is to continuously update the Web site. The site should reflect what is happening on the campaign on a daily basis. Voters will be turned off if they visit the site and see the same press release or top story that was there the last time they visited. If the site is updated to reflect daily events and breaking news, supporters will visit again and again. Continuous updating and editing requires trained senior staff and ample resources.

Hosting and Servers

In order to go live on the Internet, the Web site needs a host. The host is usually selected by the designer and costs range anywhere from \$7–\$200 per month depending on how much space is needed and what type of multimedia you plan to incorporate within the Web site. If the campaign is planning to include multimedia, such as streaming video, television, flash animation or audio, remember to plan ahead, buy enough space and make sure the hosting service is robust enough for your interactive needs. The quality of the hosting service will impact the ability of the Web site to handle a spike in visitors. Make sure you select a host that can handle this activity so that the site does not crash during busy times.

Browser Compatibility

Before going live, make sure that the Web site is compatible with, looks good and loads correctly and quickly on Netscape and Internet Explorer, as well as Macintosh browsers. Too often campaigns go live with their Web site before making sure that individuals with Netscape can load the site correctly. These problems are usually simple to identify and fix, so be prepared take the time to address them before going live.

CHAPTER FOUR

E-mail List Building and Web Content

Just as technology is worth nothing without a solid campaign strategy, e-mail lists are useless unless they are accurate and have the potential for growth. There are many gadgets and exciting technologies and hundreds of vendors and consultants who can help the campaign, but in the end, technology and elections are about good lists. Address list-building early because building an accurate e-mail list will determine how powerful technology can be in helping a campaign maximize communications, fundraising and voter contact operations.

Collecting E-mail Addresses

E-mail collection is an off-line and online activity. Ask everyone for e-mail addresses, whether they are visiting the Web site, calling the headquarters or receiving a direct mail piece. Make sure that a request for an e-mail sign-up is prominently displayed on every page of the site, not just the home page. Do not require too much info from the visitor — request only e-mail address, name and zip code. More information can be collected later.

Be creative about collection. Instead of a sign-in sheet at events that asks for an e-mail, ask attendees to sign a petition or pledge tied to a cause asking for an e-mail. After events, staff and volunteers can incorporate this information into the network. As volunteers come into the office, ask them for their e-mail addresses as well. Work with supporters to increase the e-mail list. Ask all donors and volunteers to collect e-mail addresses from their friends, family members and acquaintances.

If legally permissible, organizations that support the campaign can send e-mails asking their members to join the campaign, providing a link to the e-mail sign-up page. Ask them to provide a link from their Web site to the campaign Web site as well.

Actively use viral marketing or “tell-a-friend” techniques to engage supporters in list building. It is empirically proven that if individuals receive an e-mail from someone they know personally, they are more likely to click through and sign up on a site. Creating interactive “take action” devices is a great way to add new names to the e-mail list.

A least once a week, the campaign should contact individuals who have recently signed up with a compelling appeal or update so they know that the campaign is engaged.

Keep an eye on the unsubscribe rates on the e-mails that the campaign sends out. This provides a snapshot of how compelling the e-mail content is and how the campaign is resonating across the community.

Take campaign lists and have them commercially matched for e-mails so that the campaign can continue to maintain its relationship with its donors and volunteers online and bring them into the virtual organizing part of the campaign. Depending on the quantity of names matched, the cost per match ranges from ten to 20 cents. Companies append e-mail addresses to lists, such as direct mail recipients, event attendees, donors and volunteers, by running names against commercial files. These companies will then send an opt-in or opt-out e-mail requesting that these individuals join the e-mail list. The campaign should only pay for completed contacts, when the individual joins the e-mail list. Remember that individuals who already support the campaign are more likely to respond to alerts and missives. Paying for e-mail appends for donors, volunteers and event attendees is usually cost-effective, since these individuals are already interested in the campaign.

In recent years, campaigns have experimented with appending voter files with e-mails. At this time, this is not recommended because it results in the campaign sending unsolicited, and often unwelcome, e-mails to voters.

In general, avoid banner advertisements that charge per click. Banner advertisements that charge per acquisition, or per e-mail sign-up, are worthwhile if the banners are placed on sites that target like-minded, potential supporters. For instance, a candidate who has a strong environmental record may place a cost per acquisition banner advertisement on pro-environment sites to attract more supporters.



Writing E-mail and Web Content

Content is Key

E-mail and Web content must be brief, compelling and timely. The best writers on the campaign should be heavily involved in crafting message and Web content. Supporters and voters do not want slick Web sites and e-mails that speak only to insiders. They look for plain-written, fact-based information. Gear e-mails and Web content to the audience in order to keep the reader's attention.

Keep messages brief and concise and remember to make the copy compelling. Compelling messages are more likely to be passed on virally. Otherwise the e-mail will be deleted, or, in a worst-case scenario, the supporter will unsubscribe from the e-mail list.



Track your unsubscribe rate as the best way of gauging how your supporter communication is going.

Personalize Whenever Possible

The bottom line is that personalization increases readership and viral rates. E-mails are more likely to be passed on if the reader connects to the message. Whenever possible, begin the message by incorporating the recipient's name. If the list is segmented, craft a specific copy geared toward the particular interest of the reader. Issue surveys, which can be distributed by e-mail as well, provide recipients with the opportunity to identify their areas of interest. These surveys will enable the campaign to personalize direct communication with those individuals. For instance, if a supporter identifies education as a top issue, future communication with that supporter can be tailored toward that issue.

Urge Action

E-mails from the campaign should not be simple narrative. Instead, recipients should be urged to take action — to call into a radio show, make a donation, write a letter to the editor, pass information along to a friend or volunteer. Once mobilized, these individuals form a powerful, grassroots movement for the campaign.

Use the Viral Power of the Web

Every e-mail should ask users to forward the message to their friends. One online activist can recruit dozens of new leads for the campaign at the click of a mouse. Always use campaign e-mails to drive traffic back to the site for more information. The more the campaign engages an activist, the more likely he or she is to donate their time and money to the campaign.

Rules for the “Subject” Line and the “From” Line

If an activist deletes an e-mail before reading it, an opportunity is missed for them to make a donation or get involved in the campaign. To achieve the best open rates, make the subject line compelling and action-oriented. Personalizing the subject line by identified issue interest or geography is even better. For instance: Act Now: GOP Causes Health Care Crisis in Your County.

The subject and from lines must be intertwined with the campaign message. The individual who is sending the message often provides a compelling reason for the recipient to open, read and forward the e-mail along.

Frequency

In general, e-mail activists weekly. In the closing days of the campaign, when GOTV activities are gearing up or during breaking news events, additional contact is warranted. Supporters expect to hear from the campaign at these times, so e-mail more often.

The campaign must coordinate e-mail activity with the field, fundraising and press departments so that activists are not overwhelmed by constant communication. A senior member of the campaign must work with the campaign manager and other senior staff to be in charge of maintaining an e-mail schedule, including when it is appropriate to send an urgent communication.

E-mails from the campaign will be ignored if sent too often.



Privacy Policy

All campaigns must develop a privacy policy to reassure supporters that the campaign is not going to abuse their information or expose them to hackers. All Web sites and e-mails that ask for any personal information, including name, address, phone number, e-mail and of course financial information must be included in the privacy policy. The campaign's privacy policy should not be overly restrictive. Work closely with the designer and a legal team to identify the appropriate campaign policy.

Basic E-mail Rules

- Always include opt-out.
- Always ask for a specific dollar amount.
- Always have a "tell-a-friend" feature.
- Always ask for the visitor to take action.
- Never send attachments to a list-serv.
- Be sure to include legal disclaimers and the privacy policy.
- Be sure content is vetted and legal sign-off is obtained.

Spam

Another reason to consider hiring a technical advisor is to assist the campaign in overcoming the spam obstacle. Many ISPs, such as AOL, Earthlink, Yahoo! and Hotmail, will block blast e-mail proactively if e-mails are sent to over 5,000 addresses. This can result in a campaign never knowing that its e-mails have never reached their intended recipients. This can be avoided if the sender is whitelisted with them. Whitelisting is a long process that most professionals know how to maneuver, and often vendors will do this automatically when hired. It entails working with the major e-mail providers to assure them that the campaign's e-mails are not a nuisance, and thus should always be delivered. Do not send attachments when e-mailing supporters because the campaign can be blamed for spreading viruses. Instead include a link to the Web site so individuals can download an attachment if necessary. (Note that spam laws are consistently changing, so keep up with regulations.)

Unified Database Strategy

The campaign must have a unified database strategy which ensures that whether there are one or multiple databases that e-mails can be sent to volunteers, supporters and donors on an as-needed basis with the same e-mail tool. If donors and volunteers are kept in separate databases, then the e-mail tool must be able to access and eliminate duplicates easily. There must be functionality across all the databases.

E-mail Delivery Tools

Ideally, the campaign will want the e-mail delivery system integrated with the donor and supporter database so there is limited list exchange each time. As with Web site management, the campaign should have the ability to send e-mails at any time, to whatever audience, without having to call the vendor.

For high-volume e-mail delivery, most campaigns should work with their vendor to identify the appropriate tool. Campaigns should not use Outlook, GroupWise or Lotus Notes, which are not created for high-volume e-mail delivery, to send blast e-mails. If you use one of these programs it will take hours to complete the task. If the content of the e-mail is HTML or includes an audio or video clip, the delay between sending and receiving will be even longer. Bad addresses and replies will bounce back to this personal account, overwhelming the mailbox owner. When the campaign sends e-mails, a high-volume tool is preferred. Ask your vendor.

There must be a system in place to handle the incoming messages that result from every outbound message the campaign sends. Individuals will reply with questions on the issues, how to volunteer and to change their e-mail address. There must be a staffer in place to answer these e-mails within a 24- to 48- hour period. An auto-reply should be set up so that when a supporter responds to an e-mail, they get an immediate response informing them that the campaign has received their e-mail and will be addressing their concern or question in a timely fashion. It is important to thank them for their interest and explain that due to the high-volume of e-mails, it may take a few days to respond.

Before sending e-mail, test the delivery method to ensure that the e-mail shows up as designed, in either HTML or text, on all ISP providers, including AOL, Yahoo! and Earthlink. Often, they appear differently on each provider. This is something that the vendor can troubleshoot.

Before you send an e-mail to thousands of people, test it under any circumstance imaginable.



When working with a vendor to identify the best e-mail delivery tool, request information on tracking action on the outbound e-mails. Tools now track a recipients' actions on e-mails they receive. The campaign can get reports on how many recipients forwarded an e-mail, how many of those actually signed up to the e-mail list, how many supporters actually clicked on the link for action and how many actually took the action, whether to sign up or donate to the campaign. These tools enable the campaign to assess the success of any given e-mail and assist the writer in tailoring subsequent messages to increase actions and readership.

CHAPTER FIVE

Voter Contact

Voter contact technology offers organizers the most dramatic increase in efficiency, but is the least tested and proven. Voter contact and mobilization is and will always be about individuals connecting with other individuals who persuade them and move them to vote. How many effective personal voter contacts can one organizer make in an election? Campaigns want to maximize the number of contacts their organizers make and technology allows them to increase efficiency when persuading voters.

When considering voter contact technology, ask how the technology will make your organizer more effective and efficient. Make sure that the answer is quantifiable and that a cost-benefit analysis is taken into account. If the technology cannot meet the goal to maximize the number of meaningful contacts with voters, then it is not worthwhile spending the money.

Remember that if the campaign has a faulty field strategy or the vote goal is inaccurate, even the best technology will not produce a win.



Ask all the questions listed in Chapter 1 when making decisions about any technologies.

Voter Files

A voter file is a list of registered voters in a district, state or nation that includes addresses, phone numbers, party identification and vote history, where available. Depending on the file, there may be other demographic information including gender, birthdate and race and ethnicity appended to the file. The state party may have additional demographic information.

The voter file is the most important piece of information you have because it enables the campaign to effectively target mail, phones and walk programs, as well as GOTV operations.

Over the years, the platforms on which voter files are built have improved, providing them with the ability to better target voters.

Web-Based Data

One of the most useful formats for a voter file is a Web-based application. Web-based data offers portability, which is particularly useful when a campaign has multiple field offices. It eliminates the need for setting up hardware and software to access the voter file at each location. As long as each office has access to the Internet, it can access the file online.

Web-based data allows for continuous, real-time updates from the field as well. Any new supporters who have been identified in the field can be instantaneously incorporated into the file, improving the campaign's overall organizing efforts. Web-based voter files offer the administrator the flexibility to quickly compile universes for consultants conducting paid voter contact.

When choosing a Web-based application for the voter file, the Democratic National Committee makes the following recommendations:

- Provide varying levels of access to users as determined by the campaign. One person must be put in charge of administering these rights, sending files to consultants and creating tiered levels of access to staff or other individuals associated with the campaign.
- Provide technical support and training. It is vital that at least one person on the campaign has a relationship with the vendor who built the application in order to obtain comprehensive technical support when needed.
- Provide an option for off-line use. There will be times when access to the file must occur offline either because the Internet is down or because the administrator has designated certain users off-line use only.
- The Web-based application must integrate with other off-the-shelf database programs in order to enable staff to formulate more complicated queries.

- Produce large electronic files in common database formats, such as .dbf, .txt and .xml for paid voter contact programs. The administrator is ultimately responsible for sending files to the mail and paid phone vendors. Different consultants and the number of records sent may require different database formats.
- Look up individual records.
- Customize and print call sheets and walk lists.
- Allow real-time updates as determined by the campaign.
- Allow for updates to be double-checked by an administrator before fully appending to the file.
- Produce and track vote goals by precinct, county, district and state.
- Produce counts by voter identification, issue and geographic field.
- Report by precinct, county, region, district and state on all voter and issue identifications and field activity by day, week, month, cycle and year.
- Query on NCEC and other relevant targeting data.

If a Web-based voter file meets most of these standards, then the campaign's field operation can be maximized. There is no need to produce walk lists at headquarters and spend money on copies and delivery to field offices. As long as satellite offices have computers and printers, each office can produce its own call sheets and walk lists and do their own data entry, integration and exchange on the database. This eliminates delays.

Data Collection, Exchange, Enhancement and Integration

One of the greatest technological advances in the field of voter contact over the years has surrounded managing, exchanging, updating and integrating data from voter contact programs. Until the past few years, most campaigns had one choice — good old-fashioned data entry. Campaigns had to rely on volunteers to hand-enter information from canvasses, phone and mail programs, and issue and voter identification programs. There are now multiple options for campaigns to improve the quality and speed with which to integrate and exchange data.

Voter contact operations produce hundreds of thousands of pieces of data regarding voters that must be quickly and correctly integrated with the voter file. This data includes the results of voter registration, voter and issue identification programs, canvasses and phone and mail programs, as well as GOTV tracking data.

Palm Technology

Campaigns are turning to Palm Pilot technology to assist in the massive work of data integration, exchange and collection. It has proved fruitful for canvassers to use Palm Pilots as a dynamic way of updating the voter file in real-time. Instead of using a paper list during a walk, the canvasser has all of the key data including name, address, vote history and questions to ask the voter right on their Palm Pilot. Canvassers use the Palm Pilot to electronically record the answers they receive at the door and then go back to the office and transmit the new data back to the voter file by hot syncing — just plugging the device into the computer and clicking a button.

In addition, Palm Pilots have improved the ability of campaigns to track and assess the progress of a canvass, both for the overall effectiveness of the canvass and the efficiency of individual canvassers. Some Palm Pilots can time-stamp data entry, so the field director can track how many contacts a canvasser actually makes during a walk. In addition, the Palm Pilots can be used to create canvass reports instantaneously in order to identify fraud.

Unfortunately, some canvassers will enter bogus answers on a Palm Pilot assuming that the supervisor will not discover the scam. Technology cannot replace carefully tracking your team's work.

The downside to using Palm Pilot technology is that it requires a sophisticated, tech-savvy canvasser. Palm Pilots are best used when a campaign has regular and consistent volunteer canvassers or regular paid canvassers who receive training. Some campaigns have had their Palm Pilots stop working under extreme weather conditions. Campaigns must also decide if the cost of purchasing multiple Palm Pilots is worthwhile.

If the campaign does decide to go with a Palm Pilot system, it is important to work with professionals to test the system, leaving ample time to troubleshoot before canvasses begin.

Recently, campaigns have used Palm Pilots to broadcast television and radio commercials directly to the voter, allowing for micro targeting of paid media during a canvass. For instance, if a campaign is running a television ad focusing on prescription drugs, canvassers can show the ad directly to the voter at the door and then reinforce the message with personal conversation.



Bar Codes

Use of bar codes is almost as efficient as using Palm Pilot technology and much more cost efficient. Canvassers go door to door with a walk list that has bar codes attached to every voter and question, recording voters' answers. Back at headquarters, volunteers use a wand to scan bar codes into the system. Call lists can be created with bar code technology, allowing results from the phone program to be easily entered into the voter file.

This system allows for quick data entry and avoids typographical errors. Campaigns at all levels have effectively used this technology to enter data onto their voter file.

Data Download and Upload

The next way to exchange and integrate new data with the voter file is a simple data download from the voter file, into a list that matches the walk list or phone list for the day into an Excel or Access file. Volunteers hand-enter the answers and results from the walk program or the call program onto the file, which is then uploaded back into the voter file. This process has more opportunity for human error, with the possibility of incorrect typing and mismatched fields.

Matching Data Screens

Some voter file programs create data entry screens on the computer that perfectly match the call lists or walk lists. This eliminates a great deal of human error, since the volunteer can easily look at their paper list and mark answers off on the corresponding screen. Once the record is saved, it automatically appends the voter file.

Bulk Updates

Another option for updating the voter file is to use bulk updates. Voter files must be updated on a regular basis when new information, such as new vote history or newly registered voters, becomes available. Usually vendors who have these updates will work with the campaign's voter file manager to ensure smooth data exchange and integration.

However, many of the Web-based systems give the campaign the ability to bulk update records without going through the vendor. This can decrease the time it takes to get records appended. Additionally, the campaign's mail and phone vendors can use bulk updates to ensure that the campaign's voter file has a record of those voters who received direct mail or phone calls. Phone vendors can update the voter file directly in bulk with the results from voter and issue identification calls in order to prepare the file for future voter contact.

Tracking and Assessment

All of these methods aim toward the quick exchange of data in order to enhance the data, making it more valuable, and to help track and assess voter contact programs. As mentioned earlier, a campaign's voter contact strategy is only as good as the list. If results from the campaign's voter contact programs are quickly integrated into the file, the campaign is able to continually assess and refine its strategy.

The best use of technology is that which allows a campaign to work with more accurate information, more quickly. Updating your data is a prime example.



Campaigns must be able to track the progress of both paid and volunteer canvass and phone programs on a monthly, weekly and even daily basis. A campaign must be able to track the effectiveness of canvassers and volunteers by assessing contacts per hour. The more effective and error-free methods of data exchange and integration make tracking and assessment complement the campaign's overall strategy.

Flagging and Tagging

Another important data enhancement tool is the ability to flag or tag individual records with additional information about the activities of that particular voter. In addition to basic voter file information, campaigns can append how often the voter was contacted at the door, on the phone or by direct mail. Tags and flags can identify individuals who attended a fundraiser or a rally or volunteered. Every database should allow the campaign to create and query these tags.

Information Distribution to Field Staff

Voter file and Internet technology have made the distribution of materials to staff significantly easier, especially when staff is decentralized in offices around the district, state or nation. So much of the material that voter contact operations are built on can now be distributed via Internet or a Web-based voter file. For instance, common materials can be placed on a password-protected page on the campaign Web site so that field offices can download flyers, scripts and lists and produce copies on-site, saving both postage and time. Web applications actually allow staff to create flyers based on targeted issue constituencies.

Flyers and Campaign Literature

Staff at headquarters can create palm cards and flyers based on specific issues and messages, using sourced and vetted language. This literature can be placed on the password-protected section of the Web site for staff in satellite offices to download and print for distribution. This enables campaigns to distribute quality materials that are on message. Managers need not worry about staff or volunteers creating their own flyers that may be off-message or incorrectly sourced.

Templates allow for pre-approved text to be inserted but still give field offices options. This allows for personalization based on age, gender and geography. It allows for legal disclaimers and union bugs to be included on all materials.

Call Sheets and Walk Lists

Web-based applications allow staff to access walk lists, call lists and voter information anywhere. Lists can be printed and used immediately.

Scripts

Phone and walk scripts can be distributed to field offices through a password-protected page on the Web site. This allows the entire campaign to stay on message and allows for quick alterations in message based on daily events.

Communication Materials

One of the greatest challenges to a campaign is keeping the entire staff informed of daily developments, rapid response, documentation of advertising and basic issue and policy positions. With an Intranet, information being sent to field offices can be updated continuously, keeping staff informed on how to respond to recent attacks and how to answer questions on the candidate's issue position. One of the most common complaints before Web and e-mail technology was introduced to the political arena was that, apart from the senior staff, campaigns did not know how to answer questions arising from the day-to-day campaign developments. This was especially problematic since field staff has the most contact with the world outside the campaign.

Volunteers

The Internet makes it easy for supporters to sign up to volunteer and for the campaign to track and thank volunteers for their help. Make sure that the Web site prominently displays an option for supporters to sign up to volunteer. Whether hosting a house party, putting up a yard sign, writing a letter to the editor or staffing the office for a few hours, offer volunteers a choice of activities. Electronically generated thank you messages can be sent as soon as a volunteer signs up. Field staff can then personally follow up with the supporter by e-mail or phone.

Some campaigns create an online schedule so that volunteers can actually see the particular dates and times when the campaign needs help. Too often volunteers are scheduled to come into the office only to find that there is not enough work available or the specific activity that they were interested in helping with is not happening. Preparing an online schedule can eliminate a great deal of confusion. Even with a sophisticated online volunteer sign-up system, it is still important for campaigns to personally contact volunteers.

Distributed Call and Walk Technology via Web-based Systems

An emerging option for volunteers gives them access to call and walk lists via a password-protected page on the Web site. While this is still an unproven technology, it does have the possibility of improving volunteer efficiency. The field organizer can identify volunteers who are willing to make phone calls or walk

their neighborhoods, and then produce custom reports for each. The volunteer can then access the call or walk list and the script via the Internet.

More advanced programs allow volunteers to enter the results of contacts with voters directly to the campaign via the Web.

Mapping Technology

Mapping technology is another emerging product that can make voter contact operations more efficient. Since the technology is currently unproven, campaigns should carefully test the use of mapping technology as part of their voter contact program. This technology enables campaigns to create walk lists based not just on addresses, but also on the actual geography. Mapping technology can combine census data and geo-coding, matching this information with the voter file. This can in particular be helpful when working in more rural areas, where there is distance between the houses of registered voters. Campaigns can avoid sending canvassers on long, unproductive walks in rural neighborhoods.

Mapping technology is proving to be powerful as a data analysis tool. Adding a geographic layer to your data analysis can help you spot concentrations of demographic groups and supporters that previously would have gone undetected.

Paid Voter Contact via Phones

Campaigns now use phone technology that allow massive volumes of calls to be made in a relatively short period of time. Unlike volunteer calls, the campaign can hold the phone vendor accountable for the number and quality of contacts made.

For a fee, phone vendors provide both live and automated calls. Live calls are calls in which an actual human speaks to the voter or the voter's answering machine. Automated calls, also known as robo calls, are when a prerecorded message is delivered to the voter or the voter's answering machine.

Live Calls

Campaigns often use paid professionals to make voter and issue identification , persuasion, ballot collection, GOTV and grassroots fundraising calls. Live calls are made by paid professionals who follow a script that is usually written by the phone vendor and is coordinated with the campaign's communication program. While live calls are more costly than automated calls, they allow the voter to respond or ask questions about the campaign to an actual human being. Voters are less likely to hang up on a live person, and the calls tend to be more persuasive.

Phone vendors should provide daily reports which include the total number of contacts, how many people identified themselves as supporters, non-supporters or undecideds, how many individuals hung up, how many bad numbers there were in the file, and even how many voters could not be contacted because of a language barrier. Phone vendors must be able to provide quantitative evidence by monitoring calls and quickly relaying the information obtained from calls to the campaign so that the voter file can be appended.

Automated Calls

An automated phone call is one in which a computer automatically dials a phone number and the recipient of the call receives a pre-recorded message. Typically, the message comes from a prominent figure, a celebrity or the candidate. In general, automated calls are not recommended for communication with persuadable or swing voters. They are best used in the GOTV operation to remind identified supporters to vote, where their polling place is located and what action to take if they need a ride to the polls. Automated calls can be used to remind activists and strong supporters about upcoming events, rallies and fundraisers. For example, a recorded call by a state party chair to county chairs urging them to recruit ten more individuals for the annual fundraising gala can be extremely effective.

Interactive Calls

Interactive calls are where a recorded voice asks the voter a series of questions which can be answered by pressing numbers on the telephone pad. As with traditional automated calls, these are not particularly successful with persuadable or swing voters.

These calls, however, can be useful when working with supporters. For example, presidential campaigns use interactive automated calls to identify volunteers and how they would like to help the campaign. In a recorded message the candidate thanks the voter for their support and then asks them to press one if they would like to volunteer on Election Day, press two if they would like a yard sign or press three if they want to write a letter to the editor. The results of these calls are then reported to the campaign so that field staff can follow up and the voter file can be appended.

Interactive calls can be used for fundraising as well. If a supporter wants to donate, they can press a button and are transferred to a live person who assists them in making their donation.



It's fine to use automated calls to voters you already know support you, as a reminder or for a request. But live calling is more influential to your persuadables.

GOTV and Election Day

Advances in technology have increased the ability of campaigns to track, assess and alter voter contact operations during the GOTV operation. On Election Day, it is extremely important for a campaign to track turnout at important precincts in order to shift resources during the day. Tracking and responding to any legal issues and problems at polling places as well as collecting results after the polls close is also critical.

Cell Phones

Cell phones make a great impact on GOTV and Election Day operations. Cell phones enable both staff and volunteers to communicate quickly so that the campaign can rapidly respond to problems in the field.

1-800 Automated Number for Turnout Reports

There are new automated programs for tracking turnout in important precincts on Election Day. Many campaigns still rely on volunteers calling the headquarters from polling places with turnout reports. New programs, however, offer real-time Web reporting based on volunteers calling an automated 1-800 number and punching in results.

The campaign first creates a model of key precincts and polling places, taking into account Democrat and Republican base and swing precincts that need to be tracked on Election Day. Staff and volunteers are then assigned these targeted precincts. On Election Day, poll trackers will retrieve the vote totals from their assigned precincts at assigned times. Using cell phones they dial the toll-free number, where an automated voice prompts the tracker to enter a five-digit number to identify the polling place. The automated voice then prompts the tracker to enter the number for the first count period. After the count is entered, the auto-voice will confirm the entry. The data streams in real time to the headquarters via a Web site. The campaign can use these reports to decide whether to reallocate resources, such as moving canvass teams into certain neighborhoods, or launching a series of automated calls to a certain community. More sophisticated programs have the ability to launch automated calls and additional resources automatically based on the results.

1-800 Automated Number for Problems at Polling Places

Many campaigns provide a toll-free 1-800 number so that supporters do not have to pay long-distance fees to call the campaign. On Election Day, this number is often used as a hotline to answer questions about rides to the polls and for supporters to report problems at polling places.

Some vendors offer a toll-free 1-800 number that will automatically tell voters where their polling place is based on their home address and phone number. This kind of technology can free up staff to do more GOTV work on Election Day. Similar systems have been tested to provide a toll-free 1-800 number for voters to call in with concerns about legal problems while voting. After Florida in 2000, campaigns are more concerned than ever to track and respond immediately to voter suppression, harassment and legal concerns. These technologies can be directly connected to legal staff for immediate action. Having reports recorded on the phone line can provide for quicker legal relief and act as evidence for keeping polling places open longer.

Tracking and Assessment

All technologies are simply tools for tracking and assessing the success or failure of GOTV operations on Election Day. The more detailed the tracking numbers, the better able the campaign is to contact specific voters to ensure

that they vote. Precincts that are not meeting turnout goals can be identified early and the campaign can deliver a round of automated calls or divert a team of canvassers into that community. Before cell phones and Web tracking, information could not be acted on because it was received too late, often after the polls closed.

CHAPTER SIX

Fundraising

Technology can help a campaign raise money quickly and cheaply. The rate of return on Internet fundraising is fantastic. Depending on the volume and the method previously used to raise money, online fundraising can reduce costs by up to 90 percent. The Democratic National Committee, Dean for America, MoveOn.org, McCain for President and other presidential campaigns are excellent examples of campaigns seizing on breaking news and urgent campaign events to raise millions of dollars. Successful online fundraising efforts can generate positive earned media, creating a momentum in which both Web traffic and donations increase.

Online fundraising rewards campaigns that build and nurture a good e-mail list. When asking for money, the campaign should ensure that lists are made up of individuals that support the candidate, the campaign, and its values and are receptive to e-mail solicitations.



In addition to increasing the net take for the campaign, money raised online is money in the bank. With secure online donation sites, the money is deposited the day the donation is made, avoiding the time delay associated with processing checks.

Most of the failures in online fundraising are due to lack of attention to the e-mail list. Make sure the list is carefully and consistently updated. Invest in appending e-mails of the current donor list so the campaign has a new, cheaper and quicker way of communicating with them. Just like traditional fundraising is dependent on a good donor list, online fundraising must be based on systematic and continued asks based on giving history. Once donors are in the system, it is important to keep them abreast of campaign activity, not only by asking them to make a financial contribution, but also by asking them to give their time to volunteer or take viral action by e-mail.

Internet Fundraising

Make sure a supporter can make a donation on the home page and every page thereafter. Include the Web address on every other fundraising material, including direct mail solicitations, event invitations and as part of the candidate's pitch during call time. With the ability to process credit cards and checks online, the campaign can have the money in the bank on the same day, helping to alleviate the ever present cash-crunch experienced on campaigns. Supporters calling the headquarters who want to make a donation can either be directed to the Web site or give their credit card or check information on the phone for immediate processing by the site staff.

Once someone has donated online, they should receive a thank you note automatically by e-mail. Include a request asking the donor to volunteer on the campaign, as well as a link to the e-mail sign-up page of the Web site. Ensure that the campaign's donation page is compliant with all legal and campaign finance guidelines.

Secure Donation Site

Donors must feel comfortable and secure when giving their credit card or bank account information on the site. The campaign should work with the designer to ensure that the site is completely secure for giving financial information. In most cases, the campaign will have to sign up for a processing vendor that provides secure donation servers, such as www.authorize.net, www.paypal.com, www.verisign.com or www.visa.net, to process funds into the campaign's accounts. These vendors will charge fees either per transaction or monthly (for high-volume customers). Secure servers are an excellent option for donation pages and for volunteer sign-up pages or any other form in which individuals give personal contact information.

Privacy Policy

In addition to securing donor financial information, the campaign must clearly state its privacy policy so supporters and donors are comfortable when giving their personal information. A privacy statement clearly articulates that the campaign will protect the privacy of anyone who shares personal or financial information with the campaign. Post the privacy policy often, if possible on every page of the site.

Merchant Accounts

Before a campaign can accept credit card donations, a merchant account must be set up. Visa and MasterCard can be purchased together, while American Express and Discover must be purchased separately. Once purchased, the campaign can identify the bank account where funds can be electronically deposited. Merchant accounts usually charge a fee per transaction along with a monthly fee, or agree to charge a fee based on a certain amount of donations per month. These fees range from three to five percent, which is a steal compared to the cost of direct mail fundraising.

Prospecting

Prospecting for new donors online is more difficult. Unlike traditional fundraising, sending e-mails to prospective donors that have been purchased from vendors is usually viewed as spam.

Successful online prospecting can occur if the campaign asks donors, supporters and volunteers to send e-mails to their friends with a link to the donation page on the Web site. This viral prospecting can be fruitful because individuals are more likely to listen to the advice of family and friends. Set up a system where supporters can take credit for the donations that they secure, so the campaign can send them a thank you letter immediately.

Instead of sending unsolicited e-mails to a purchased list, ask allied organizations or high profile supporters to send an e-mail to their own membership list or Rolodex with a link to the donation page, or an opt-in for recipients to sign up on the campaign's e-mail list.

Resoliciting

As with traditional fundraising, one of the best indicators that someone will donate to a campaign is whether they have made a previous contribution. This is why it is important to get e-mails for all donors. The campaign can save significant money in direct mail costs by resoliciting donors over the Internet. Previous donors are usually receptive to urgent e-mail appeals for funds before a fundraising filing deadline or the next television buy, for instance. Include a viral marketing feature in all e-mails so recipients can tell a friend.



Fundraisers always go for the “low-hanging fruit” first — that is, those who are most likely to donate. Technology makes it easy to figure out who has already contributed and is therefore most likely to do so again.

Donor Maintenance

Once a donor is included in the campaign e-mail list, use email – instead of faxing or using snail mail – to send thank you notes, regular updates and action alerts. Remember that everything included in campaign-sponsored e-mails is public record, so make sure all copy is properly vetted. You do not want to see an e-mail generated by your campaign in the newspaper the next day.

Taking Advantage of Daily Events and News

Mini-campaigns, in which the strategy is to raise money quickly, efficiently and at almost no cost, on the Internet have proven to be financially successful in recent years. The most common campaign is built around an upcoming filing deadline for reporting contributions received, which is critical to establishing viability and momentum. Sending an urgent ask with an immediate deadline explaining that the donor can be part of a larger effort to raise a significant amount of money in a short period of time is usually successful. Donors respond to concrete and meaningful deadlines.

Dean for America repeatedly asked donors to give whatever amount they could, raising \$10 million in one filing period. Edwards for President experienced a large influx of donations immediately after the endorsement of the Des Moines Register. With only one week left until the Iowa caucuses, the campaign used the endorsement to raise urgent funds for GOTV activities.

One cautionary note: these efforts are only as successful as the content of the message and the way the campaign harnesses media events and key deadlines and ties them to the overall campaign strategy. Because of the minimal cost of Internet fundraising, this can be an extremely successful undertaking if implemented correctly.

Transactional Internet

Larger campaigns with bigger budgets can open an online store which sells signs, t-shirts, hats and buttons, for instance, for a profit. Decisions on spending campaign resources for these materials must be made based on the campaign's overall strategy.

Some campaigns use materials as incentives for additional fundraising or growing the list of supporters. If a supporter or donor brings ten additional friends into the fold or ten friends to give money, a campaign can give that individual a t-shirt or some other campaign material.

Events

Some campaigns have found success in building fundraising events online. The benefit of incorporating online technology into event planning is that it eliminates the high cost of producing and sending invitations. Recognize that donors are different — some respond to events, some to direct mail and some to online appeals.

Some event hosts will know whether or not their attendees will respond to online invitations, while others will see the need for traditional printed invitations. Remember that you should always include an e-mail address on printed invitations so that attendees can RSVP online.

CHAPTER SEVEN

Communications

Technological advances have been both a blessing and a curse when it comes to campaign communication. Technology has elevated the distribution of information to press and supporters exponentially, allowing campaigns to respond to daily events and negative attacks immediately. The 24-hour news cycle gives the campaign no rest, nor place to hide from the press, supporters and opponents.

Technology can really assist in the three major areas of campaign communication. Downstream communication, initiated by the campaign, involves its relationship with the press, supporters and voters. Upstream communication is initiated outside the campaign and is aimed toward sending information to the campaign. An emerging type of communication is side-to-side communication, where supporters communicate the campaign's message with each other and organize amongst themselves.

Downstream Communication: Press

Campaigns must keep up with the demands of the 24 hour news cycle. Fortunately, technology has eliminated the need for campaigns to purchase costly blast fax programs. Depending on the size of the campaign and the budget, almost all media communication can be done by e-mail. It is now possible to distribute television ads, as well as audio and video statements via e-mail and the Web instead of the costly production and delivery of tapes and videos. Technology has dramatically reduced the cost of communicating with the press.

Press Releases, Rapid Response and Documentation

The media operation must have an accurate media list that includes fax numbers and e-mails. Depending on the size of the list, the communications director can create an e-mail distribution list on their personal e-mail system, such as Outlook, GroupWise or LotusNotes, to blast e-mail press releases, fact sheets and rapid response materials. Remember that communication with the media must be separate from communication with the larger list of donors and supporters. Be aware, however, that many reporters will sign up as supporters on the Web site in an effort to receive all communication coming from the campaign.

Digital Photos, Audio and Video

Many campaigns have capitalized on the use of digital photography as quick and easy ways to get pictures reflecting the campaign and the candidate's message to a broad audience. Use of digital photos for media is an under-utilized but useful activity. For the mainstream media, digital photos provide the media visual options when running stories. More importantly, the campaign has control of message and visuals. For smaller press outlets, such as weekly papers and newsletters, digital photos are regularly printed as is. Use digital photos to continuously update pictures on the Web site. This will keep the interest of visitors to the Web site.

When purchasing a digital camera for campaign use, make sure that it provides pictures at the correct resolution for the press and publication on the Web site.

In the past, campaigns used radio actualities to spread audio of the candidate on important issues of the day to radio outlets. With the advent of digital audio technology, campaigns can now record their own audio on a digital file and distribute that file by e-mail. Digital recording demands only a computer with a good microphone and is much less expensive than purchasing or renting an actuality machine.

Digital video is available to campaigns as well, but remember that editing is still an important part of the process. Most campaigns are using digital video technology to distribute campaign commercials or even clips of positive news stories to highlight good coverage to other members of the media who may not



have seen it.

Password-Protected Press Page

Many campaigns have employed a password-protected media center, allowing the outlets covering the campaign to feel as if they have direct access to the campaign. The developer can construct a media center on the Web site which is only accessible after the user enters a password assigned to him or her by the campaign. Include all press releases, issues papers, transcripts of speeches, documentation of advertising and rapid response to debate.



Work with the communications director to decide whether a password-protected section is appropriate. In many cases, anything that would be given to the media would be given to the general public, so there may not be a need for a password-protected site.

Downstream Communications: Supporters

The Internet and e-mail have significantly improved the way that campaigns communicate with their supporters. The campaign can update supporters on key issues and breaking developments. A campaign can use the Internet and e-mail to ensure that ads and positive news stories are quickly distributed to its base. The campaign can use viral marketing to help spread the campaign's message to its supporters and their friends, building the e-mail list at the same time.

Issue Papers, Rapid Response and Documentation

Keep supporters informed as to when and where they can find the latest issue papers, fact sheets and other relevant policy information. Any new additions on the Web site should be publicized with an e-mail informing supporters that new material has been added. In addition, post alerts on the home page explaining and highlighting new additions to the site.

A campaign's supporters are the best people on the ground to refute attacks and respond to the everyday developments in a campaign. When a campaign launches the paid media campaign, make sure that supporters have access to the documentation of ads and access to view the commercials online.

When an opponent attacks the candidate's record, supporters need to be able to immediately access how to respond to questions asked about the candidate. The same applies to debates. Supporters will be watching and need to know how to respond the next day as well. These activities can engage campaign supporters and invest them in carrying the message.

Flash Animation and Viral Marketing

Viral marketing is an amazing way to engage supporters, ensure that they have the most recent campaign message and increase the e-mail list of supporters. These "tell-a-friend" e-mails are popular. Campaigns can choose to send newspaper endorsements or its latest television ad to supporters asking them to tell ten friends. Those ten friends get an e-mail, which does not come from the campaign, but from a like-minded friend. Supporters can literally build more support for the campaign.

Work with the technical advisors to obtain regular reports on the effectiveness of viral marketing. Campaign can record click throughs, or how many individuals actually clicked on the link to the campaign's ad when they received the e-mail. These reports track how many supporters sent it along to their friends and how many of those friends signed up on the campaign's e-mail list.

Many successful viral marketing campaigns have focused on flash animation, multi-media pieces that encompass the campaign's message. Flash animation can be costly to create, but is still significantly cheaper than producing television ads. If done well, they achieve a higher pass-on rate than other types of viral e-mails. Make sure the Web site and server can handle the load of these flash pieces.

Upstream Communication

Upstream communication originates from outside the campaign, usually from supporters. This is an effective way to engage supporters and give them an outlet to discuss the campaign and give feedback.

Online Chats

Online chats are a useful way to engage a campaign's supporters and get earned media coverage. The campaign can sponsor an online chat with the candidate or other staff and surrogates. Supporters submit questions to be answered, much like an Instant Messenger chat. Sometimes a campaign will get media coverage of an online chat. Remember, however, that your opponent will flood the online chat, so it is important to prepare supporters to ensure that there will be positive participation.

Some campaigns participate in online chats sponsored by other organizations, such as news- or issue-based Web sites. If supporters participate in online chats on news sites or third party sites, the campaign can attract new supporters. Keep in mind, however, that when participating in these chats, audiences will predominately be supporters of the campaign and the opponent.



Always know who you're working with. Technology is accessible to everyone — your opponent included.

Inbound E-mail

Be prepared to receive e-mail from supporters. In fact, the more e-mails the campaign sends out asking for action, updating supporters or asking for money, the more responses the campaign should expect. It is vital that the campaign put a structure in place to respond to all e-mails. There must be one, generic e-mail address such as info@johndoe.org, where all e-mails are forwarded, and one person in charge of responding with ample staff support. Most of the time, questions are simple logistical or issue-oriented questions, easily answered by forwarding a link to a particular part of the Web site. As a general rule of thumb, respond to e-mails within 48 hours. If possible, all inbound e-mails should get an auto-response thanking them for their e-mail and letting them know that a response is forthcoming. Given the high volume of responses, set realistic expectations in the auto-response.

Grassroots Surveys

Use the campaign Web site to ask visitors issue-oriented questions. For example, what is your number one issue this election year? These surveys should not be used to truly assess public opinion. Remember that any online poll sponsored by the campaign is usually flooded with responses from supporters and opponents and does yield true public opinion results.

Online issue surveys can be a useful grassroots-mobilizing tool when surveying supporters and tracking their issue interests. Once supporters have signed up on the e-mail list and responded to an issue survey from the campaign, the campaign can personalize e-mails to these voters based on their responses, making a better connection with the supporter.

Some campaigns ask supporters to visit a third party Web site conducting polls, such as news Web sites, especially if the poll is specific to the campaign. This is an excellent request for supporters to take action.

Qualitative and Quantitative Research

When it comes to quantitative campaign surveys such as benchmark, baseline and tracking polls, most campaigns use the traditional phone survey. Performing quantitative research over the Internet can be cost-effective for a cash-strapped campaign, but requires significant tradeoffs in sampling methodology. This holds as a general rule when polling registered or likely voters, but the Internet can provide significant advantages when the target audience has specialized characteristics, particularly those with a high likelihood of Internet access. Decisions on using the Internet for quantitative surveys must be made in conjunction with the pollster. As more and more voters have access to the Internet, campaigns may move towards more quantitative research over the Internet.

Technology has opened up additional options when it comes to qualitative research, such as focus groups and ad testing. Online qualitative research can enhance survey research particularly with respect to ad testing, where focus groups or dial tests would be used traditionally. The Internet allows testing of a statewide ad not in one major city, but to voters across the state. Perhaps most significantly, sample sizes increase dramatically. Instead of a focus group of eight to 12 participants or a dial test with 20 to 40 individuals, 1,000 or more individuals can test an ad online, providing diagnostic evaluations as well as moment-to-moment ratings. Open-ended responses in these Web surveys tend to be more comprehensive and detailed, thereby giving a real sense of what individuals are thinking.

In most cases, online survey research can yield higher-quality data than focus groups, which rely on geographically limited respondent recruitment.



Whether a campaign chooses to conduct Internet survey research, many campaigns now take advantage of technology that allows staff to view and participate in focus groups from the comfort of the campaign office. Many facilities offer online viewing of focus groups over the Internet, allowing campaigns to save the travel and lodging costs of sending staff to focus groups. The staff and candidate log into a Web site and see live-streaming video of the focus group. In addition, the candidate, consultants or staff can submit additional questions over the Web to the pollster facilitating the group. Once groups are completed, they are archived and can be burned to DVD for future viewing. As Internet-based technologies continue to improve, campaigns will be able to conduct focus groups with larger sample sizes wholly online. These groups will provide the kind of sample and data quality found on Internet-based ad tests and further reduce the time and expense associated with traditional qualitative research.

Campaign Web Radio

If the campaign has the resources, the press operation can actually produce its own radio show. Dean for America held daily radio shows online in which staffers talked about the race and took questions and comments submitted by supporters online. This is an opportunity to get the campaign message out unfiltered. Remember, however, that the most likely audience will be hard-core supporters of the campaign and the opponent so it is important that all participants stay on message.

Side-to-Side Communication: Web Logs

Web logs, or blogs as they are called conversationally, have become an increasingly popular outlet for supporters to talk with each other about the campaign and the issues. A successful blog has the ability to draw individuals over and over again. Contrary to myth, blogs do not fill up on their own. Interesting content based on campaign message and strategy must be on the blog for continued discussion. For every popular blog, there are stories of ten that failed because no one visited or the threads were unsuccessful. Even more disappointing is a blog where no one returns because of a lack of compelling conversation.

Blogs create a sense of community for campaign supporters and can be used to recruit volunteers, urge action and for viral marketing to pass information along to others. As a campaign grows larger, it may be necessary to manage expectations with the blog. There is Web log software that must be purchased in order for blogs to work smoothly.

Anything that is sent by e-mail or on the Web is public and the campaign should treat it as it would a press release or speech. All published materials must be vetted and approved by the research, communications and legal departments of the campaign.



Research

Technology has changed the way campaigns do self- and opposition research and how they respond to attacks and during debates. If a campaign cannot rapidly respond to attacks, it is considered technically mediocre. The press often expects documents, facts and responses to be available immediately over cell phone, e-mail or even Blackberry. Thankfully, technological advances now make this possible.

Technology means you have no excuse to not be immediately prepared for anything that comes your way. Be prepared to move quickly.



Internet

Almost everything can be found on the Internet. From voting records, property records or policy papers, a good researcher must be able to compile a strong research book on their candidate and the opponent using the Internet. The time and money spent copying microfilm and researching voting records at libraries has been reduced considerably. Many Web-based subscriptions to information services are available for information that is harder to find.

Lexis-Nexis

Lexis-Nexis has become a staple for most communications and research operations. Lexis-Nexis is a Web-based information service that offers fee-based access from news publications to property records, from corporate filings to congressional voting records. Campaigns can choose what level and what access they desire. Prices are based on the particular package chosen.

Rapid Response

Delivery of rapid response on attack ads and during debates is expected by both the press corps and supporters. A research operation must use Internet, Web-based e-mail technology to compile and deliver rapid response messages.

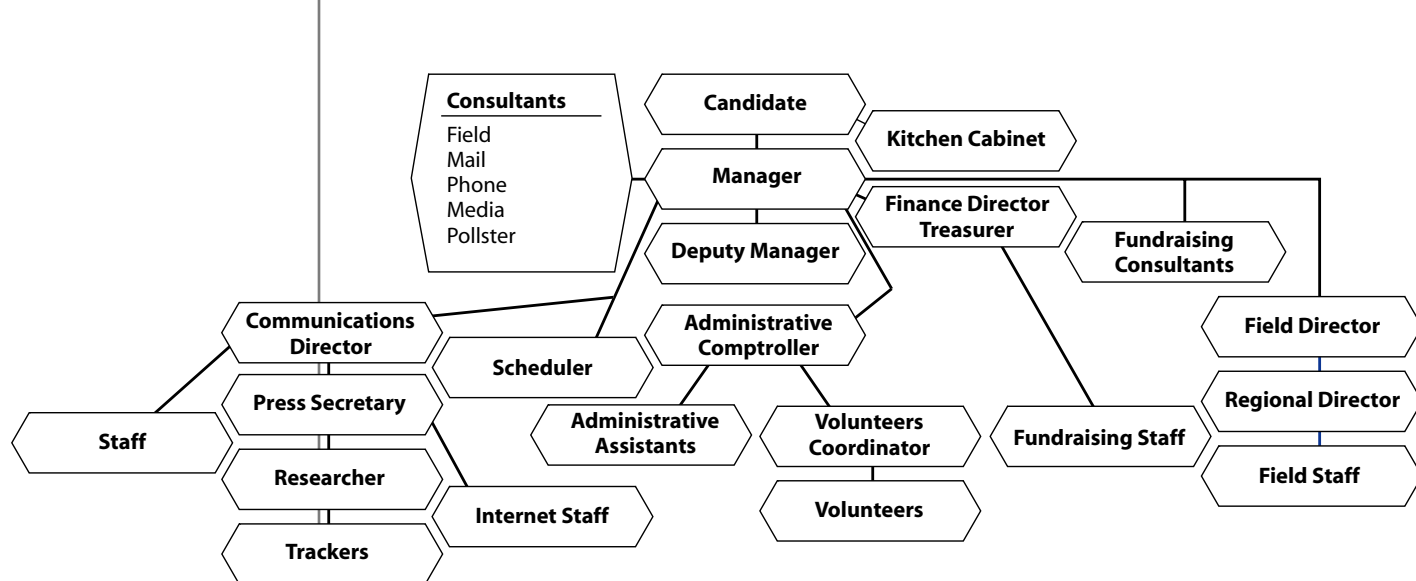
CHAPTER EIGHT

Conclusion

In the time it took to write and read this manual from beginning to end, technologies have already changed. Campaigns are being offered hundreds of different options to maximize their operations and implement campaign strategies. It is a relief to remember that while technologies are every changing every day, the basic questions a campaign needs to answer remain the same.

Sample Campaign Organizational Chart

Appendix



Note: This organizational chart should be used only as a guide. Larger campaigns will need to create additional staff positions, while smaller campaigns may be able to fill some of these positions with volunteers.

Administrative Staff — Responsible for ensuring that all aspects of the campaign are running smoothly.

Communications Director — Works with the Campaign Manager to devise an overall press plan, including long-range planning and event media, speechwriting and scheduling and advance.

Comptroller — Audits the campaign and regulates all finances.

Field Organization — Contacts, identifies and mobilizes voters for Election Day.

Finance Director/Treasurer — Writes and implements a finance plan that tracks money by method and date, and ensures that all legalities are met.

Fundraising Consultant — Supplements the on-staff fund-raising operation by organizing events with representatives of PACs or other interest groups with supportive constituencies.

Fundraising Staff — Sets fund-raising goals and figures out how to meet them, prepares materials to distribute to donors and plans fund-raising events.

Kitchen Cabinet — The candidate's team of personal advisors.

Mail Consultant — Produces persuasion mail to complement other paid media.

Manager — Makes all strategic and tactical decisions; oversees budget, cash flow and daily management of operations.

Media Consultant — Creates television and radio advertising based on information about persuadable voters, the candidate's record and that of his or her opponent.

Pollster — Conducts polls that will be used to target voters and develop efficient messages.

Press Secretary — In charge of day-to-day event planning and interaction with the media.

Researcher — Gathers information to be used in campaign materials, collects background on the candidate and their opponent and verifies accuracy of everything put out by the campaign.

Scheduler — Determines which invitations the candidate accepts by balancing the demands for the candidate's time.

Trackers — Staff dedicated to tracking press coverage of the candidate.

Volunteer Coordinator — Consults with all divisions of the campaign to best utilize volunteer resources.

Volunteers — Can be used in all aspects of the campaign.

Glossary

Automated Calls — Voter contact phone calls in which a computer automatically dials a phone number and the recipient of the call receives a pre-recorded message. Typically, a recorded message comes from a prominent local or national figure, a celebrity, or the candidate

Automated Numbers — Real-time Web reporting based on numbers punched into an automated - number.

Bar Codes — The small image of lines bars and spaces that corresponds with a specific set of data, in this case voting contact.

Baseline Poll — See benchmark poll.

Benchmark Poll — A thorough, - to -minute phone survey asking respondents for their opinion about a variety of issues, concerns and political figures. Used to determine viability, develop message and to identify voters. Also called a baseline poll.

Blast Email — A single email that, with the use of a bulk email tool, can be sent out to a large number of recipients.

Browsers — An application program that provides a way to look at and interact with all the information on the World Wide Web.

Bulk Email tool — A tool that is capable of handling large shipments of emails.

Campaign Database — A list containing information on supporters, donors and voters. May also contain any information produced by the campaign.

Common database formats — The layout of the file in terms of how the information must be organized within the file.

Content Database — Storage of all materials created for the campaign including speeches, press releases, issue papers, rapid response, documentation, and other substantive content.

Domain — A domain name locates an organization or other entity on the Internet.

Donor Maintenance — Further correspondence and updates from the campaign to a voter once they have donated to the campaign.

Downstream Communication — Communications that are initiated by the campaign involving the press, supporters, and voters.

Extranet — A Web-based mechanism for accessing these databases from outside the main office network.

Financial Filing — Storage of any important financial paperwork.

Financial Reporting — Producing the campaign finance reports as required by municipal, state and/or federal law.

Flagging — See tagging.

Fundraising Database — See Supporter, Donor, and Voter Database

Grassroots Survey — Polling done to collect data on voter mood toward an issue.

Hosting/Servers — Programs within a computer that enable other users to access a webpage from their computers.

In-Office Network System — Technology system including computer hardware, desktops, laptops, and all peripherals such as printers, scanners, and wireless devices.

Interactive Calls — Voter contact in which a recorded voice asks the voter a series of questions which can be answered by pressing numbers on the telephone key pad.

Internet Fundraising — A fundraising campaign in which donations are made from the campaign's website.

Internet Service Provider-ISP — A company that provides individuals and other companies with access to the internet.

Intranet — A Web-based mechanism to distribute information and give access to databases from inside the office.

Issue Site — A site dedicated to a candidate's platform issue rather than the candidate specifically.

Lexis-Nexis — A Web-based information service that offers access for a fee to everything from news publications to property records, to corporate filings to congressional voting records.

Live Calls — Voter contact phone calls made by paid professionals who follow a script that is usually written by the phone consultant and is coordinated with the campaign's other communications and message.

Mapping Technology — A new technology that combines census data, maps, and geo-coding to coordinate with the voter file.

Matching Data Screens — Method of field data entry in which the canvasser enters data from the field onto palm technology and then uploads screen information to the main campaign database. This matching or recording capability is offered through many field data programs.

Merchant Accounts — An account purchased and opened with major credit vendors such as Visa, Mastercard, American Express, or Discover that enables credit transactions and depositing of funds into a specified bank account.

NCEC National Committee for an Effective Congress data — Voter file data used to target voters and plan organizing tools such as walk lists.

Paid Voter Contact — Phoning voters through hired of phone consultants. Although there is a fee attached to paid media, contact is more efficient and of higher quality than volunteer voter contact.

Palm Pilot-technology — Palm is the trade name for a popular personal digital assistant PDA, a form of handheld device, also known as a palmtop computer. The key feature is a basic method of data entry: a writing device, called a stylus, can be pointed at icons on the display to select items for entry. The stylus can also be used to enter alphanumeric data words and numbers by manually scrawling them across the face of the display.

Parody Site — An imitation website used to humorously critique the competition.

Personal Email System — Application that retrieves email from the online server.

Phone Consultants — Individuals who provides live or automated calling for a fee.

Phone systems — Network of telecommunications that can either include individual direct phone calls or a switchboard line system.

Privacy Policy — A statement ensuring that the campaign will not abuse information received from activists and donors.

Prospecting — A form of viral campaigning or word-of-mouth campaigning in which emails are sent to one voter with the intention that they will in turn forward it.

Qualitative Research — Research results that lend themselves to a countable or numerical representation such as statistics, benchmarks, baseline and tracking polls.

Quantitative Research — Research results that do not lend themselves to a countable or numerical representation, such as opinion generated from focus groups and ad testing.

Remote Access — A technology that allows for access to email and office networks from outside the office.

Scalability — The ability to grow and change technologically with the variations in a campaign.

Scripts — A pre-written dialogue used on walks or on the phone to help facilitate interaction between canvasser and voter.

Search Engines — A set of programs that locate websites on the Internet through word and other criteria defined by the searcher.

Secure Contribution Site — An added security feature that ensures a donor's credit information is encrypted so as not to be intercepted over the Internet.

SPAM — Junk email.

Subject Line — The title of the e-mail usually displayed with the senders' email address.

Supporter, Donor, and Voter Database — A contact list of people involved in the campaign including a campaigns' supporters, activists, donors, and voters.

Tagging — A data enhancement tool that allows the user to tag or flag individual records with additional information about the activities of that voter.

Tell-a-Friend — See viral marketing.

Tracking Poll — Brief survey conducted to ascertain evolving voters' attitudes in the wake of paid and earned media.

Transactional Internet — Online store of campaign materials, like signs, t-shirts, hats, buttons, etc.

Unified Database Strategy — A strategy that ensures that regardless the amount of databases, emails can be sent to volunteers, supporters and donors whenever desired with the same bulk email tool.

Upstream Communication — Communications that are initiated on the outside of the campaign and aimed toward sending information to the campaign.

Viral Marketing — or tell-a-friend. A technique of message dissemination via word of mouth.

Virtual Private Network VPN — A way to use a public telecommunication infrastructure, such as the Internet, to provide remote offices or individual users with secure access to their organization's network.

Voter Contact — Reaching voters individually in any given universe.

Voter File — A list of registered voters in state, district, or nation that includes address, phone, party identification and, where available, vote history.

Web Content — Information displayed on the Internet website and disseminated through email.

Web Strategy — A targeted, designed, and written plan for your campaign's internet site.

Web-Based Data — A useful format for voter filing.

Weblogs or blogs — A running online commentary, either interactive or by a single author, providing informal commentary on particular topics at a website.

Whitelisted — A long process entailing working with the major email providers to assure them that the campaign's emails are not spam and will therefore be received to clients' inboxes.

Technology Checklist

- Determine which facets of your campaign plan can be assisted by technology.
- Determine how much money you can afford to devote to efficiency-increasing technology.
- Prioritize your technology investments.
- Research the costs and reliability of the technology you're interested in.
- Ask for references for your tools.
- Test the technology.
- Hire consultants, if necessary.
- Buy your Web site domain(s) and set up your site.
- Write your privacy policy and secure your donation pages.
- Determine criteria for using the technology (i.e., who has access to the database, who will use the Palm Pilots, who has a campaign e mail address).
- Train all campaign staff members who will use the technology.
- Determine who will need cell phones on Election Day; distribute a contact list.
- Set up a 1-800 number for Election Day staff to call in results, and for supporters to call in problems at polling places.

