

ORGANIZING, OUTREACH, and PRACTICAL POLITICS for LIBERTARIAN ACTIVISTS

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About the Author

Joseph Knight was born in southern New Mexico and raised on a small family farm in Northwestern New Mexico, where he was active in Boy Scouts, 4-H, and FFA.

Knight served in the U.S. Army as an instructor. He was the #1 honor graduate in the *Methods of Instruction* course. He served a tour in Vietnam and on his return was active in the peace movement with Vietnam Veterans Against the War.

Knight attended New Mexico State University where he earned a Bachelor of Science in Agriculture, with honors. He was elected to the Student Senate where he was known as an advocate of fiscal responsibility and civil liberties. While at NMSU, he served on the Land Use Task Force of REERIO, an environmental study group. Knight received additional education in Business and Management from San Juan College.

Knight served as Parks Superintendent of Farmington, NM where he first observed the workings of “public” sector bureaucracy first hand. Knight has also owned and operated his own businesses.

Knight has implemented and managed apprenticeship programs in both the government and productive sectors, and has also worked in sales, advertising, and publishing.

Knight has served the Libertarian Party of New Mexico in many capacities, including State Coordinator, editor of New Mexico Libertarian, numerous terms on the state and county Central Committees, and two terms as State Chairman. As Campaign Chairman of the “McDonald for Commissioner of Public Lands Campaign” he provided strategic direction that resulted in tentative major-party status for the state party.

Knight has received professional campaign management training from the National Campaign Institute and Campaigns & Elections. He has been a member of the American Association of Campaign Consultants.

Knight served the national Libertarian Party as a Field Organizer and has conducted numerous seminars on campaign strategy and organizing, as well as giving introductory presentations to community and campus groups around the country. He has authored many published editorials and a popular pamphlet on libertarian philosophy.

INTRODUCTION

From my first days in the Libertarian Party I have been exploring ways to make the libertarian movement more effective.

Early on I learned from experience by helping organize an affiliate of the Libertarian Party in my hometown. I made a lot of mistakes in those days, but I learned from my mistakes and I learned from other people's mistakes too. I also embarked on an extensive reading program designed to learn techniques and generate ideas.

The stuff that worked was polished and used around the state, and later, around the country. During my tenure as a national field organizer, I acquired some professional training and gained even more experience.

This modest offering is my attempt to share the most pertinent of what I have learned. I hope readers will find this material useful and that the result will be more active and successful pro-freedom organizations - single-issue advocacy groups, coalitions, Libertarian Party affiliates, and political campaigns.

While I have considered and suggested many ways to work for liberty, one thing I have never advocated is backing down from principle. There are times when a zip on the lip is appropriate, I wish a pox on the house of anyone who would use this information to further erode freedom or raise taxes.

I hope and believe that in these pages a freedom-fighter activist will find a way to get started, or do better. So digest the material and think about how YOU can apply it in YOUR situation, in a meaningful way. It is reader application that will give meaning to these ideas. So, read, reflect, read, plan, read - and then get out there and make it a free country!

Joseph Knight

ORGANIZING

ORGANIZING – GOALS

The Goals Axiom:

“Keep your eyes on the prize;
you hit only what you aim at.”

Your primary goal is what you want to achieve. It’s your purpose – the reason the organization exists. The goal will affect the legal status, the organizational structure, the strategy, and the methods of operation.

The *primary goal* (purpose and mission) should be plainly stated, in writing, in a charter or mission statement. A preamble can state the goal in general terms and then made more specific in enumeration. Of course, if your organization is a chapter or operating unit of a larger organization, you should refer to the charter or mission statement of the parent group.

The broader the goal is, the broader it seems the base of support would be. However, broad goals are harder to focus specific activity toward. “A better America” is a broad goal with thousands of perceptions of what a “better America” would be and what we could do to work toward one.

A narrower goal is easier to focus on, but can also mean narrower bases of support. A narrow goal such as “A better America through repudiation of the Moon Treaty” would not likely rally thousands of fiery supports, but does imply a specific course of action: education, lobbying, candidate support, litigation; all aimed at rescinding an international agreement. The goal could be further narrowed by limiting activity to just one course of action if available resources or legal structure so dictate or suggest. For example, an organization may be organized as “educational” under Section 501(c) of the IRS code which means contributions are tax-deductible for the donor, but prohibits the group from endorsing political candidates.

For advocacy groups organized around an issue that doesn’t have wide popular support, it may be advantageous to broaden the goals or attach the cause to another movement through infiltration, co-option, and/or with coalition building.

For advocacy groups organized around an issue that does have wide popular support (for example gun owners rights or abortion rights or peace), it is strategically wise to keep the goal focus narrow. Frequently, factions will develop (each with their own baggage to throw aboard). Each additional issue the group takes on can cost another segment of the base. A “Citizen’s Committee to Defend Gun Rights and Ban Abortion” will alienate pro-choice gun owners. Anti-war groups frequently lose support by taking on social causes of the left, alienating conservative and libertarian peaceniks. *Conversely*, a broad-based, broad-goal group – such as a political party – can co-opt single issues to broaden its base.

It’s easy to see how conflict develops between those working for a single issue and those trying to do broader philosophical outreach within the context of a single-issue advocacy group.

A political party, by definition, tries to influence public policy by becoming part of the government. The Libertarian Party is broad-focus in the sense that it has many positions as the party of “everyone’s freedom on every issue” but is narrow-focus in the sense that an unifying principle is used to guide the party’s positions on any given issue.

In addition to the primary goal, organizations have incremental or subservient goals. The primary goal is the organization's purpose and ultimate focus. The next level of goal implementation is the long-range strategic plan. "Mid-management" will have regional and/or performance-area goals. Local affiliates and their subordinate committees will have shorter-term operational goals.

At every level, organizational management and activity should be oriented toward goal attainment. Management should: (1) clearly communicate higher-order objectives, (2) collaborate with subordinates to develop and implement subordinate goals and (3) measure and evaluate organizational activity by the standard of progress toward the primary goal.

ORGANIZING – ORGANIZATIONAL TYPE

NOTE: As the law is subject to change and interpretation, the reader is cautioned to consult relevant IRS publications before starting any type of tax exempt organization. The author assumes absolutely no responsibility whatsoever for any problems any group has with the IRS or other government agencies. For up-to-date information on current law, see also:

Alliance for Justice, <http://www.allianceforjustice.org>

Exempt organizations that libertarian activists would likely be interested in are "educational" and "political."

501(c)3 ORGANIZATIONS. These are defined by the IRS as:

Corporations and any community chest, fund, or foundation organized and operated exclusively for religious, charitable, scientific, testing for public safety, literary, or educational purposes . . . no part of the net earnings of which inure to the benefit of any private shareholder or individual, no substantial part of the activities of which is carrying on propaganda, or otherwise attempting to influence legislation (except as otherwise provided in subsection h), and which does not participate in, or intervene in, (including the publishing or distribution of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

Exempt educational organizations do not pay income taxes and contributions are tax-exempt for their donors. Educational organizations can also receive contributions from corporations and any likelihood of corporate donations should be a factor in determining whether to seek this status.

What constitutes crossing the line from education to propaganda, and what constitutes "substantial part of the activities" are legal questions. The author believes that the courts have been fairly liberal in this area, but a conversation with a lawyer would be prudent where there is any doubt, before you talk to the IRS.

527(e) POLITICAL ORGANIZATIONS. These are defined by the IRS as:

(1) Political Organization. The term "political organization" means a party, committee, association, fund, or other organization (whether or not incorporated) organized and operated primarily for the purpose of directly or indirectly accepting contributions or making expenditures, or both, for an exempt function. (2) Exempt Function. The term "exempt function" means the function of influencing the selection, nomination, election, or appointment of any individual to any Federal, State, or local public office or office in a political organization, or the

election of Presidential or Vice Presidential electors, whether or not such individual or electors are selected, nominated, elected, or appointed.

Contributions to political organizations are not tax deductible for the donors. Political organizations must pay tax, at the highest corporate rate, on earned income. However, “earned income” does not include:

527(c)(3) ... (a) a contribution of money or other property, (b) membership dues, a membership fee or assessment from a member of the political organization, (c) proceeds from a political fundraising or entertainment event, or proceeds from the sale of political campaign materials, which are not received in the ordinary course of any trade or business, or (d) proceeds from the conducting of any bingo game (as defined in 513(f)(2), to the extent that such amount is segregated for use only for the exempt function of the organization.

EDUCATIONAL-POLITICAL ORGANIZATIONS. Corporations may establish “separate segregated funds” and pay for the administrative and solicitation costs of the fund, which is regarded as a “connected political organization.”

Non-incorporated membership organizations may sponsor a non-connected political organization but the amount of the contribution is subject to state and/or federal contribution limits.

OTHER LEGAL CONSIDERATIONS. Organizers should also consult FEC Campaign Guides for Connected and Non-connected Committees, as well as their state tax laws and election codes.

Incorporation can be an expensive, bureaucratic quagmire but offers the feature of limited liability. Limited liability means that only the assets of the corporation, not those of the individual shareholders, can be seized to satisfy debts. For example, if the Chairman of your Students for Freedom Club, Inc. has a traffic accident doing club business, the victims can sue the Chairman, and sue the club, but if the Chairman’s assets and the club treasury are insufficient for any resulting judgment, the court can’t go after you house as a member of the club.

The author believes that the courts generally treat unincorporated associations as limited liability partnerships, but the law varies from state to state, so a conversation with an attorney might be appropriate.

UNDERGROUND ORGANIZATIONS. Many groups take the constitutional guarantees of free speech at face value and operate without regard to legal structure. Small, informal groups can usually do this with little consequence.

As laws become more complicated, and free-speech rights are gradually eroded away, many groups go “underground” to some extent.

Deep underground groups usually operate as independent cells and have elaborate security procedures. For a discussion of underground organizations see “Secrets of Underground Organization and Operation” from Paladin Press (originally Human Factors & Considerations of Undergrounds in Insurgencies published by the U.S. Army).

[AUTHOR’S NOTE: I’ve always been inspired by the White Rose Society. In Hitler’s Third Reich, the anti-Nazi resistance included this tiny group of students and veterans who ran an underground pamphleteer operation centered at the University of Munich. They used a hand-operated duplicating machine to create thousands of leaflets – “The Leaves of the White Rose” – and mailed them from

various cities to people chosen from telephone directories, to scholars, and to pub-owners. They traveled throughout Germany to mail leaflets from undetectable locations. Leaflets were also left around the University in the middle of the night. The leaflets took on the Nazis, and the German people for allowing the Nazis to remain in power. The Gestapo stamped out most of the White Rose, yet there was never a move to disband. Two of the founders were caught at the University leafleting. Although classes had let out, they still had a few pamphlets left so they ran upstairs to drop them from above, even as the Gestapo was surrounding the building. As one of them was executed, he shouted his final words, "Long live the freedom!"]

ORGANIZING – ORGANIZATIONAL STRUCTURE & FUNCTION

The Organizing Objectives Axiom:

"The objectives of organizing are to
AIM – focus on the target goal,
PLAN – map a strategy and determine tactics. and
ACT – organize and commence operations."

GROUP DECISION MAKING. Groups are generally better suited to making broad policy and program decisions than to actually operating programs.

There are some *advantages* to group decision making:

1. A broader base of information, ideas, and talent; and
2. A broader concurrence with decisions.

There are also some *disadvantages* to group decision making:

1. A longer and more cumbersome decision-making process;
2. Potential for excessive conflict; and
3. Potential for groupthink.

A certain amount of conflict has actually been shown to increase group performance but a point of diminishing returns, then reversing returns, is reached. Beyond this point, conflict results in decreasing group effectiveness.

Groupthink is the phenomenon of consensus becoming more important than the organization's primary goal.

An organization that is managed effectively will keep its policy-making body out of operations (as a body) and will assign clearly defined missions to individuals, with specific, preferably measurable goals. The individual or committee responsible for an operational area should have input in formulating the goals. The administrative body should periodically assess progress and goals of the operational areas.

ORGANIZATIONAL STRUCTURE – SOME MANAGEMENT CONCEPTS. Line positions are those in the direct chain-of-command and involve the subdivisions directly pursuing the organization's primary goal. Staff positions are advisory and support functions. Chairman and candidate are "line" functions. Election law consultant and Data Base Manager are examples of staff functions.

Smaller organizations have smaller management spans – that is, a single unit group may have a president with all committee chairs reporting directly to the president. Larger groups will increase the

management span by adding levels of mid-management. Line functions extend throughout the span but many staff functions are retained or centralized at the higher management levels. Line management should represent a pyramid to prevent the leadership from being top heavy.

ORGANIZING THE LOCAL GROUP. A good way for local organizers to proceed is to start with a clearly defined goal, a proposed constitution, and a number of activists committed to an organizing committee. If the group is to be an affiliate of a larger state or national group, or of a coalition, the primary goal is already defined and the constitution may be inherited from the parent group.

At a first organizational meeting, members of the organizing committee ratify the constitution and elect officers. Other job and committee assignments should also be made while enthusiasm is high.

The first meeting should not end without the date, time, place, and agenda of the next meeting being set. At the second meeting, coordinators and committees can report on their progress.

MODEL ORGANIZATION FOR COUNTY LIBERTARIAN PARTY. To illustrate organizational structure for a local group, the author offers his preferred model for an ideal county LP affiliate.

The County Chairman chairs a Central Committee with four other members. The Central Committee should:

- (1) Provide administration, direction, and coordination; and
- (2) Plan and execute projects, special events, and conventions.

Additionally, each member of the Central Committee chairs a specialized committee.

The Treasurer should chair the Finance and Procurement Committee, whose job is to:

- (1) Raise funds through solicitations and other fund-raising activities; and
- (2) Disperse funds as directed by the Central Committee.

The Campaign Committee should:

- (1) Research public offices in county to determine how libertarian principles could be applied, develop office-specific platforms, prepare candidates' handbooks and briefings for each office;
- (2) Identify, recruit, and train potential candidates, get candidates on ballot;
- (3) Develop and implement campaign strategies; and
- (4) Coordinate local efforts for state and national candidates.

It is inappropriate (and often illegal) for the party to endorse candidates prior to nomination. However, independent committees can propose slates of candidates. Also, the individual campaigns should perform as many of the above functions as possible, especially with regard to ballot access and campaign strategy.

The Watchdog Committee should:

- (1) Attend meetings of city councils, county commissions, and other public bodies;
- (2) Attend "town hall meetings" and other forums sponsored by elected officials;
- (3) Alert the Central Committee of pending matters that have potential for exploitation or that affect operation of the party; and
- (4) Present Libertarian positions on issues before public bodies.

The Outreach and Education Committee should:

- (1) Give presentations to clubs, classes, and other groups;
- (2) Work with the County Chairman to prepare and submit press releases;
- (3) Proselytize through advertising and literature distribution;
- (4) Register voters; and
- (5) Conduct seminars for members (philosophical and technical).

For a new affiliate, the “committee” is more-often-than-not the individual Central Committee member who has accepted responsibility for the job. If other volunteers come forward, they can review the list and sign up for what they would like to do. This is a rather sophisticated model and won't work for every group. If your Central Committee would rather have everybody work on everything – and there is usually considerable overlap anyway – go with the flow and do whatever works best with your group.

MEETINGS – FREQUENCY. The frequency of meetings will vary with the size, commitment, and available time of the members. A campaign committee may meet daily during the active period of a campaign. An organizing committee for a new group may meet once a week at first.

Typically, the entire membership will meet once a year with interim business being conducted by a Board of Directors (or Central Committee) and most of the operations carried out by coordinators, committees, fronts, or coalitions. The Board of Directors (or Central Committee) of a local group will typically have a business meeting once a month.

A good, active organization can have some type of activity or “meeting” every week.

MEETINGS – TYPES.

(1) Business meeting. A business meeting is best limited to planning activities, working, and conducting business. Business meetings are not the place for ideological diatribes or debates on fine points of philosophy – unless pertinent to a resolution or policy decision under consideration. Good business meetings are formal, follow an agenda, and are conducted by correct parliamentary procedure. The author prefers business meetings to be separate from “programs.”

(2) Discussion group. A discussion group is normally a round-table analysis of a single issue. The group can choose the issue in advance, publicize the discussion, and have a discussion leader who will keep the focus on topic. Alternatively, some groups prefer informal, free-flowing discussions, allowing members or visitors to dialogue on a variety of issues. Discussion groups can appeal to prospects exploring the nature and philosophy of the organization and activists seeking to hone their debate and discussion skills.

(3) Outreach event. The outreach event is designed to attract prospective recruits and establish friends in the community. Typically, the event features an outside speaker or a debate. This is the event to publicize. It often starts the recruitment process. It can be sponsored by the primary organization, a front, or an ad-hoc committee with everyone in attendance getting a packet from the sponsoring entity as they enter. A key objective is to get them in your data base. Individual slip forms are preferable but a sign-in sheet works too.

(4) Social. The social – a picnic, a supper club, or a coffee klatch – serves many purposes. It can be an opportunity to show potential members your human side, to discuss organizational business informally with other members, to develop inter-organizational relationships, and to just have fun.

THE NO-MEETING ACTIVIST. Organizers will encounter people who will not attend meetings but will help in other ways. Do not deprive your cause of human resources just because they won't attend meetings. Societies are changed by the work done between meetings, not at them.

The Victory Through Tenacity Axiom:

“Winners never quit,
quitters never win.
Never give up,
no matter what.”

ORGANIZING – STRATEGIC & OPERATIONAL PLANNING

The Strategic Planning Axiom:

“You get there faster
when you look at the map
and determine your route
before you leave.”

A strategy is a plan. A tactic is a method or tool. An operation is action.

An organization's strategy is a broad, long-range plan for achieving its goal. It starts with ongoing activities plotted on a time line. It can contain different sections such as outreach, political, fundraising, campus, legislative, etcetera.

The political timeline would have the primary campaign period and general election campaign period shaded in and would mark fixed items such as filing deadlines, convention dates, and of course, election day. The planners would add items such as when to start candidate recruitment and mark dates of campaign events.

The outreach timeline would plot fairs, gun shows, and other events. Not only are the days of the event marked, but the deadlines for getting into the event. Planners would mark when to start preparations for each event.

All organizational meetings are plotted, as well as other activities such as deadlines, publication, and mailing of the newsletter. Think of a linear, horizontal two or three year calendar across the top of a page with the various sections below.

The timeline plan can be expanded into different organizational levels (regional, state, local) and different contingencies (best case, worst case, most likely case scenarios).

It can also encompass tactical and operational planning. The marks on the timeline for each activity or date can be keyed to a narrative expounding on information such as contacts, methods, legal requirements, past experiences, standard operating procedures, or anything else that is pertinent.

The most effective plans focus on the organization's primary goal, utilize research and intelligence, include an accurate assessment of available resources and capabilities, are chronological, are

comprehensive, are integrated through the organizational levels and operational areas, are communicated, are monitored and evaluated, and include contingencies.

No matter how good the plan, don't exclude unexpected opportunities just because they are not in the plan.

LEADERSHIP

Leadership is the directing of organizational resources and activities toward achievement of the primary goal by influencing the behavior of others.

Influence is achieved by:

- (1) Formal authority – power inherent in the job or office held by the leader;
- (2) Credibility – respect for the leader's expertise and ability;
- (3) Persuasion – the ability of the leader to communicate with and motivate subordinates;
- (4) Charisma – personality traits of the leader that inspire loyalty and emotional motivation; and
- (5) Factors inherent in the nature of the group.

MOTIVATION. Abraham Maslow categorized motives into five levels. At the base are physiological motives (hunger, thirst). When these motives are satisfied, the next level is security (order, stability). Then comes belongingness and love; esteem and success; and finally, at the tip of the pyramid, self-actualization (an emotional drive to be creative).

A homeless person handing out fliers for a meal is motivated at the base level. The paid secretary is motivated at the second level. A third-level volunteer just joined because of his friendship with other members. The student who wants to "make a difference" is motivated at the fourth level. The egotist you're trying to get elected to office is probably motivated by self-actualization.

Eric Hoffer points out in *The True Believer* that fanatics are frequently people who suffer from low self-esteem and are motivated at levels four and five. They use causes to achieve and self-actualize, and are generally more likely to change sides than to quit being fanatics.

Achievement-motivated behavior is reinforced by feedback and seeing positive results from effort. Success begets success.

THE LEADER'S JOB. The ideal leader had three roles:

- (1) Delegate all other jobs to coordinators or committees.
- (2) Ensure that all other jobs are done correctly and move the organization toward goal attainment.
- (3) Constantly strive to do roles 1 and 2 better.

Leadership technique is largely a matter of personal style, but the basic objectives and roles remain the same.

LEADERSHIP – WORKING WITH VOLUNTEERS

KEEPING VOLUNTEERS. Organizations and leaders must effectively recruit and utilize volunteers to move political or social organizations toward their goals. Here are nine rules of volunteer management:

- (1) INVOLVE THEM. When they ask, “What can I do to help?” their enthusiasm and commitment level is at its highest and should be reinforced with an assignment.
- (2) PACE THEM. If they are asked to do too much too fast, they will likely burn out early.
- (3) APPRECIATE THEM. Recognize their importance. Don’t take them for granted.
- (4) INCLUDE THEM. Old-timers tend to form cliques. Volunteers must feel welcome and be part of things. Keep them informed.
- (5) RESPECT THEM. Let them control the level of their commitment. What do they want to do for the group or campaign?
- (6) UNDERSTAND THEM. Will they have opposition from their families? Are they looking for learning, growth, or social opportunities? What motivates a particular volunteer?
- (7) TRAIN AND SUPERVISE THEM. Volunteers need to know precisely what is expected of them, and how to do it.
- (8) PROJECT A VISION OF VICTORY. Convey that their efforts will result in success. They won’t want to waste a lot of time on a lost cause.
- (9) PROJECT A VISION OF DEFEAT. Complacency has destroyed many a front runner. Why should a volunteer work so hard on a sure thing? Without the dedication of the volunteer, the bad guys will win.

As a practical exercise, reflect on organizations that you have volunteered for in the past – and why you no longer volunteer for that group.

The Leadership Axiom:

“If you can motivate, lead.

If you can’t or won’t lead, help.

If you can’t or won’t help, get out of the way.”

FUNDRAISING

A revenue and budget section should be part of your organizational plan.

Sources of revenue can include membership dues, a pledge program, direct mail solicitations, a large donor program, newsletter subscriptions and advertising, and fundraising projects.

Dues buy the member the right to participate in the organization’s decision-making process and other

activities. They should be as inclusive as possible and membership can be structured at different levels of dues with corresponding benefits for higher levels. The disadvantage of dues is that they may exclude people with talent to offer and thus deprive the group of valuable human resources.

A monthly pledge program stimulates “over and above” giving and different programs can be earmarked for different organizational needs, allowing donors to take part in appropriation. The key is to convince the donor to commit to a regular, specific amount. A major advantage of pledge programs is that through use of automatic debit and credit card charge arrangements, you do not have to continually harangue the donor with solicitations or reminders.

Direct mail works because it can utilize targeting, repetition, and different types of appeals over time. An especially effective type of direct mail for building a pledge program is an “insider newsletter” format. Direct e-mail can work well also, at less cost, and of course, if the organization has a web site, it should include a mechanism for making donations.

Large donor programs can solicit corporate endowments for some types of organizations (but not political). Key players can personally solicit “heavy hitters.” An attorney can help you set up a Wills and Trusts Program.

Newsletter subscriptions and advertising can not only make your newsletter self-sufficient but can generate additional revenue.

Fundraising projects can be anything from credit cards offered through your bank that rebate money to the organization whenever used, to blood drives (shed your blood for freedom – sell plasma and give the money to the organization) and bake sales. A raffle is time-proven, especially if you can get prizes donated, free and clear, up front. If permitted by local laws, cash lotteries and bingo games are even better, especially if they are regular and develop a return clientele.

[AUHTOR’S NOTE: My local county LP is virtually funded 100% by our annual rifle raffle. We purchase a rifle in January, usually an AR-15 or something similar. Sometimes we add a second pistol rifle. We sell tickets throughout the year, individually and at all the events we work. The drawing is at our own Bill of Rights Day event in December and serves as an additional draw to that event. Generally, we spend around \$1,000 for the firearm and sell tickets for \$5 each or 5 for \$20. An AR-15 on display at our various booths and tables also serves as a visual draw to the booth.]

Develop your fundraising program according to the Program Development Axiom.

The Program Development Axiom:

“Try everything.

If it works, do it more.

If it doesn’t work, do it differently or do it less.”

See the Campaign Finance sections for more details and ideas on fundraising.

COMMUNICATING IDEAS

COMMUNICATING IDEAS – A MATTER OF MARKETING

THE MARKET ENVIRONMENT. Persuasive communication is salesmanship. The activist’s role is

marketing. The market environment (the market place of ideas) is where you sell your product (your position, cause, candidate, philosophy, whatever).

The elements of your market environment that are most important are:

- (1) Your market – the person you are talking to or the people you want to convince and the factors intrinsic to the market that influence your marketing; and
- (2) Your marketing – what you know about your market and your product, and how you use that information to sell your product.

Other market environment factors will include legal restrictions on how you can operate, your resource base, the level of communication (are you doing one-on-one with your neighbor or planning a mass-media campaign?), and the context of your environment (fair booth, high school class, campaign, debate, court, media).

THE MARKET. Ultimately, all market communication is to the *individual*. You may use sophisticated targeting techniques to determine which large number of individuals receive a communication, or you may stumble across a casual prospect in a parking lot. But it is when an individual makes a “buy” decision about your product that your movement grows. Ultimately, you must know about the individual; that is where your market research – or your gut-level hunch – must stand and deliver.

If dealing with individuals, consider personality type. One model holds that there are four broad categories: the scientific-analytical type, the touchy-feely people person, the traditionalist-organized type, and the impulsive-adventurous type. Knowing your listener’s primary personality type can give you valuable clues as to how to best communicate your ideas to that person. For a splendid discussion of personality theory applied to communication of libertarian ideas, get the Communicator Course from:

Advocates for Self-Government, <http://www.self-gov.org>

You should also consider whether your prospect is in a receptive mode. One mode is “normal.” In the “normal mode” people are receptive and reflective. However, there is a natural emotional need for certainty which drives a tendency to seek consistency among one’s various beliefs. When the consistency is challenged, the drive triggers a defensive “shield” reaction. Something even as simple as asking for a decision can trigger “shields up.” Decisions and changes of opinion are most often made in the normal mode.

MARKETING – THE SALES PROCESS. Serious activists should study salesmanship. There are many courses and books available.

Learn the sales process. The number of steps in the process and what they are depends on the book you are reading but generally the first step is prospecting and the last step is closing.

Prospecting is identifying potential customers (members, or votes). Qualifying your prospects is determining which prospects are most likely to become customers – such as prioritizing a list of voters by which ones are most likely to vote for your candidate or which activists are most likely to donate to your group or which demographic subsets are most likely to be receptive to your positions.

Prospecting can involve narrow targeting or can be as random as talking to people passing by a fair booth. The “market survey” technique using “The Worlds Smallest Political Quiz” (from the Advocates – see above) screens quiz takers and the “pollster” asks for names and addresses of those who score as libertarians – qualified prospects. See more in section on outreach.

The intermediate steps in the sales process involve various gambits and techniques that can generally be applied to politics.

The final step in the sales process is always closing. Closing is finalizing the deal; getting the signature on the dotted line, getting a commitment – a membership application, a volunteer, a donation, or a vote.

The path from the first step to the last step is a matter of emphasizing the positives (things that make the customer want to buy the product) and overcoming the negatives (things that make the customer want to shop elsewhere).

A car salesman emphasizes performance (a positive) while downplaying the price (a negative). The positive overcomes the negative and the customer buys the car.

A candidate knows from polling which of his (or her) positions are popular and hammers away on them. The candidate also knows his negative positions (those that cost more votes than they gain) and soft-peddles them. If a voter's total positive perceptions of the candidate overcome the voter's total negative perceptions, that's one more probable vote.

MARKETING – ONE-ON-ONE. *You* are the first factor in the communication equation. People *will* judge the message by the messenger. Your appearance, speech, tone and manner can either trigger “shields up” or keep the prospect comfortably in the “normal mode.”

The Affinity Axiom:

“The more people perceive you to be the way they are,
the more receptive they will be to your ideas.

The more people perceive you to be different than they are,
the more you and your ideas will be perceived as a threat.”

Strive to be friendly, not threatening. Establish rapport to keep shields down. If you are *liked* first, it will be easier to *convince* later.

You and your cause must be credible. You gain credibility from your title and position and your perceived expertise.

Your cause may be a different matter. Ideas seem to go through four overlapping stages: (1) ignorance, (2) ridicule, (3) debate, education, and evaluation, and (4) popularization or rejection. The idea is most credible in stages three and four; however, credibility will transfer from a credible messenger, at least temporarily.

Subjects in one study were given identical messages. Half of the recipients were told the message was from someone they deemed credible and half were told the message was from a less credible source. The measured influence was over three times greater in the high-credibility group. A sleeper effect occurred four weeks later however, as subjects forgot the source information but remembered the message information and the influence curves balanced out.

MARKETING – BODY LANGUAGE. Your prospect's body language can clue you as to whether shields are up or down. “Shields up” signs include fidgety behavior, looking for ways to change the subject, or acting as you might act when approached by a panhandler.

People also have limited attention spans, and if you can't hold their attention, the shields automatically go up. Your objective is to keep the shields down. If the shields stay up, you may do better by terminating the conversation. Give your prospect something to read, which he can do later in a more receptive mode, or perhaps let the conversation drift away from the shield-raising topic.

MARKETING – QUESTION, DON'T ARGUE. You may win an argument but that doesn't mean you've convinced anybody of anything. Arguing, even asserting, tends to keep shields up. Questioning however, can tend to lower shields as the prospect reflects on the question.

Questioning can also help you identify your prospects personality type.

Questioning can lower shields by showing that you are interested in the prospect.

Questions can identify areas of affinity to build rapport on, and areas of conflict to avoid or overcome. (*Wedging* is emphasizing areas of disagreement and thus driving wedges between the prospect and the cause – the opposite of marketing.)

Questions can be used to answer questions, and thus retain control of the conversation.

Questions can be used in the Socratic manner to lead people to conclusions. (But remember, they killed Socrates.)

Questions can be used to close – get a commitment for a vote, donation, or membership.

One effective technique uses questions to seal the deal. Use yes-yes questions instead of yes-no questions. A yes-no closing question such as “Do you want to buy it?” or “Will you join?” will likely generate more “no” answers than “yes” responses. You will do better with assumptive-close yes-only questions like “When do you want it delivered?” (giving a delivery time is the same as saying yes) or “Would you like to sign up as a general member or get on the active list?” (choosing a membership category is the same as saying yes).

[AUTHOR'S NOTE: I used a non-questioning variation of the “assumptive close” at the introductory presentations I used to give for the Libertarian Party. The audience always sat at tables with voter registration forms and pens in front of them. After the question-and-answer period, I would close with something like “OK, let's fill out these forms together. If you're not currently registered, check the 'new registration' box at the top. Be sure to print clearly ...” I had very good luck and frequently registered 100% of the attendees.]

You will also do better if you ask people to *do* something rather than ask if they *want* to do something. “Would you please sign a petition to put term limits on the ballot?” will get more signatures than “Would you like to sign a petition to put term limits on the ballot?” You get what you ask for. The first question asks for an action response, the second question asks for a value judgment response.

MARKETING – PRESENT YOUR PRODUCT IN THEIR TERMS. Describe your product (position, cause, candidate) in terms of benefits rather than features. A feature is about the product. A benefit is about the utility the prospect will derive from the product.

A feature of county government legislation might be that it would cause a sink-hole government operation to be sold off. A benefit is that this would cause property-tax assessments to go down.

Ideas are best communicated in terms of the recipient's values and agenda.

The Constant Values Axiom:

“It’s easier to convince someone that your position is consistent with their values than it is to change their values.”

A pitch on gun-owners’ rights would appeal mostly to gun owners. Non-owners would see little benefit from the position. A pitch on drug legalization would appeal mostly to drug users. Non-users would see little benefit in such legislation. However, a pitch on crime reduction would have broad appeal and could present gun-owners’ rights as reducing crime by defending our right to defend ourselves and drug legalization as reducing crime by eliminating the black market. Reduced crime is a *benefit* of gun-owners’ rights and drug legalization. The Libertarian Party used this approach in its “Safe Streets” pamphlet.

Be aware that words and phrases have connotations beyond their precise meanings. A restaurant could offer a meal of “golden farm-fresh eggs, country sausage, and home-style hash browns” or the same items described as “denatured chicken fetuses, ground guts of a dead pig, and greasy, shredded starch globules.” The first description has a much more pleasant connotation and will likely sell more meals.

Most people respond more to emotional appeals than to rational appeals and thus need some emotional attachment to, or association with, the message. You can make or break that attachment on anything from the choice of a word, to the charisma of the messenger.

Never offend your listener by implying that they are either stupid or morally wrong for a position or belief. You will never convince anybody of anything if they are mad at you or don’t like you. You could by explaining how you used to believe the way they do. (An exception to the “never offend your listener” rule is when the real target audience is an observing third party. Heated exchanges in cyberspace forums, for example, are more for the benefit of other members of the forum than the principles in the exchange.)

You can reduce negative perception and exert a downward pressure on shields by concession. You can concede a minor point to make a major point or concede a major point and take it back later. “What you are saying may be true but don’t you think that ...”

Absolutism triggers shields up. If you are an absolutist, try not to be perceived as one. It’s just too big a leap for most people. We absolutists generally do better building our case one building block at a time. Using concession techniques helps softens perceptions of absolutism. Remember the Constant Values Axiom (above) and always concede on values – but *never* surrender the high moral ground (see High Ground Axiom below).

The High Ground Axiom:

“Never surrender the high moral ground;
God is on my side.”

Drug legalization *is* a pro-family position: the institution responsible for the moral guidance of our young people should be the family, not the government. Free-market capitalism *is* the humane economic system: the standard of living rises for everybody in a free market, including the poor.

MASS MARKETING. The same basic principles apply to mass marketing as to individual communications. You are still talking to the individual – you are just talking to more than one at a

time, and probably through some medium other than eyeball-to-eyeball contact.

Your market must still like the messenger. Ronald Reagan won two presidential elections by making people like him, not by converting the majority to his conservative philosophy. Bill Clinton won two presidential elections by making people like him, not by converting the majority to his liberal philosophy.

You must reach your market with shields down. They must have some emotional affiliation or attachment to your message.

You must still understand the individuals to seek to reach and present your message in their terms, without insulting their intelligence or integrity.

Repetition is especially important in the advertising part of your mass marketing program. Most people need to see or hear an ad several times before they respond to it. A long-term commitment to your ad concept and an extended run will generally bring good long-term results. Remember, shields will block stimuli overload and clutter along with your message if not the shields are not lowered. Good short-term results generally require overwhelming the market with your message and penetration of shields by sheer force of volume.

Long-term, and to a lesser extent, short-term mass marketing programs can be tested on limited segments of potential markets.

COMMUNICATING IDEAS – THE SPEECH

Giving a speech to one person may keep shields up. Members of an audience however, generally feel more at ease listening to a message in the form of a speech.

You can keep shields down by developing rapport and affinity with the group. Use lots of humor. Maintain your credibility by projecting confidence.

You can develop yourself as a speaker by joining Toastmasters or taking a course at the local community college (which also will provide an audience for your message) You can also establish an internal speaker development program.

You might also consider taking a drama course at your local community college. By regarding your speech as a performance and “going into role” at the podium, introverted and even shy individuals have become good public speakers.

Your own speaker development program can be developed around a weekly or monthly supper club. Start with some basic training materials for new players – such as videos of talks on giving talks and/or some of the Advocates for Self-Government materials (see reference above). Each member then speaks to the group in rotation at the regular meetings. As experience, feedback and observation of peers allow each speaker to develop good, exportable programs, the speakers can be booked in other forums for outreach and education. See more on speeches in subsequent sections.

COMMUNICATING IDEAS – TEACHING

There are a few basic keys to communicating to teach. Your students should maximize their results by using these learning techniques:

- (1) Input the information via multiple sensory media – hear it, see it, write it, think it, say it.
- (2) Rehearse the information – recall it, review it, repeat it.
- (3) Understand the information – don't just memorize it.
- (4) Recognize the information in relation to other information; outline notes and text materials, see information as it fits into the big picture.
- (5) Use the information – implement it in a hands-on way and evaluate your application and the results.

Remember that repetition is crucial. The U.S. Army tells its instructors to structure a class with an introduction or preview, body, and summary: “Tell them what you’re going to tell them, then tell them, then tell them what you told them.”

Remember that involvement is also crucial. Use classroom or workbook exercises and questions to get students to reflect on the information they are receiving.

OUTREACH ACTIVITIES

OUTREACH ACTIVITIES – NATURE & OBJECTIVES

WHAT IS ACTIVITY? Activity: syn – deed, achievement, feat, accomplishment, exploit, battle, engagement, instrumentality, agency, exercise, motion, operation, behavior, action, movement, work, business, doing.

TYPES OF ACTIVITIES. For purposes of this discussion, activities can be classified as *outreach* or *political*.

OUTREACH ACTIVITIES: promote your cause indirectly by educating people, building support and influence, recruiting, and helping your organization grow.

POLITICAL ACTIVITIES: promote your cause directly by attempting to influence government policy through lobbying legislative bodies and public officials, initiatives and referendums, and campaigning for public office.

Political activities are discussed in subsequent sections.

TACTICAL OBJECTIVES OF OUTREACH ACTIVITIES. There are five different objectives the organization attempts to accomplish through outreach activities:

- (1) Name recognition. Make your group's name a household word.
- (2) Issue identification. People need to know if you stand for what they stand for.
- (3) Education. People need to know *why* your position, philosophy, or cause is morally correct, practical, and achievable.
- (4) Credibility. People need to perceive and respect you as a viable entity.
- (5) Growth. Your organization or movement must grow, prosper, and remain vigilant. There is no status quo in politics. As Bob Dylan sang, “He not busy being born is busy dying.”

As your organization plans activities, assess each potential activity by the standard of these objectives. Even activities that are primarily social can and should contribute to tactical objectives.

OUTREACH ACTIVITIES – THE STUMP SPEECH

The basic introductory presentation – or stump speech – is general in nature. Think of it as a verbal brochure. The general outline should be:

- (1) A brief overview of your movement and its mission;
- (2) A presentation of your philosophical perspective or philosophical basis for your position;
- (3) A vision of how practical or workable your position or philosophy really is and how the audience would be affected;
- (4) An overview of your strategy, progress, and prospects (for credibility);
- (5) An emotionally-based appeal to support the cause; and
- (6) A close asking for the specific commitment of a membership or vote.

This general format can be modified as appropriate for specific situations. Item #1 can be preceded by a statement of a problem to be solved which creates a need for your movement, especially if you are representing a single-issue group.

The introductory speech (and subsequent narrower-focus speeches) should include many elements: humor, anecdotes, historical precedents, charts and graphs, quotes, short chains of reasoning, and emotionally-loaded sound bites. Remember to build affinity.

The introductory speech should be developed in three versions: 20 minutes, 45 minutes, and 90 minutes. The 20-minute version is for use at service clubs, talk shows, and similar guest-speaker venues where time is an issue. The 4-minute version is primarily for use in high school and college classes. The 90-minute version is set up as an independent event, either in a public place or a private home. In homes, it can be exported to other homes via the Tupperware concept, “If you like what you heard here tonight, you can book me in *your* home for *your* friends and neighbors.”

A sophisticated group will have a speaker coordinator to book speakers. Once the first speaker is on the circuit, the process can be replicated and expanded. If you are a multi-issue group, additional programs can be developed on specific issues.

Literature and name/address forms should accompany the speaker, and when appropriate, a fundraising pitch should be made.

OUTREACH ACTIVITIES – THE OUTREACH MEETING

The outreach meeting is an event designed to draw people from the general public who are not members of your organization.

Most commonly, it is an outside speaker, preferably someone with some name recognition and credibility. The program could include more than one speaker.

The event should be highly publicized by fliers, print and electronic advertising, direct mail, free media and word of mouth. If the organization is a multi-issue group, or has image and perception baggage, the event could be sponsored by an ad-hoc committee, front, or multi-member coalition. However, some name recognition and credibility can accrue to the sponsoring organization just by having their name on the event. Either way, attendees can get information about the core group once they are at the event.

Everyone walking through the door should be given a program and packet of information about the sponsor(s), issue(s), and speaker(s). Fundraising and data-base building are appropriate at this type of event. Get their names and addresses, and ask for a donation. Admission can be charged but the author prefers to get them through the door first and doing the fundraising pitch once they are there. Conclude with a pitch to join or get active.

OUTREACH ACTIVITIES – FRONTS AND COALITIONS

A front is an organization that is controlled by another organization, either formally through sponsorship or informally through infiltration and cooption. You can establish a front to focus on a specific area, activity, issue or mission. A front can accomplish a separate legal function than the parent group, i.e., a 501(c) educational organization controls a political action committee.

Fronts will also enable you to get help from people who would not support the larger cause or sponsoring organization directly.

When groups have common ground, they can form a coalition to pool resources and leverage their efforts. Even groups radically opposed to each other can co-sponsor debates where each can exploit the event for outreach.

Groups based on ideology are frequently reluctant to form coalitions with other groups. The reluctance is based on the possibility of ideological baggage or contamination from the other groups. But contamination works both ways – your group can develop outreach opportunities in allied groups.

Working with other groups can be a way of gaining incremental advances.

The Incremental Advance Axiom:

“Something is better than nothing:
something now, more later.”

OUTREACH ACTIVITIES – THE MARKET SURVEY

A true market survey is intended to collect data about your market, your potential markets, and the way your product is perceived, or would be perceived under various scenarios. The market survey discussed here however, is a prospecting technique for generating a list of names and addresses of people who share some or all of your basic positions or philosophy.

The technique is simple. You merely ask people what their positions are and when they agree with you, you get them into your data base. The technique can be used via booth, phone or door-to-door canvassing where permitted by government.

The technique works best when you remember that its objective is quantitative (to generate a number of qualified prospects, not to close). Make the survey operation appear to be a professional poll rather than an outreach activity of your organization.

Libertarians are familiar with the World’s Smallest Political Quiz from the Advocates for Self-Government, which scores participants in two categories, personal or civil liberties, and economic or free market. Libertarians are identified as those who score high in both areas (conservatives score high on the economic scale, liberals score high on the personal scale, and authoritarians score low on both scales). Those scoring as libertarians are then asked to sign up for a free newsletter or more information.

[AUTHOR'S NOTE: I have extensive experience in using this technique, especially on college campuses around the country. My objective was to start College Libertarian Clubs. Those students who scored other than libertarian were thanked, given an envelope with a few complimentary copies of the quiz, and went on their way. Those scoring as libertarian were asked to fill out the contact form. In my situation, I had to expedite the close since I normally had only one day on campus, so the envelope given to libertarians contained my tri-fold pamphlet on libertarian philosophy. While they were filling out the contact info form, I quickly explained that we were getting a club started on campus and if they might be interested, they should come back at 5:00 PM when the survey was over so we could talk. That gave them time to review the material in the envelope and usually a small group would come back. Over coffee, an organizing committee would be formed, and oriented. They would get a copy of the other names generated and an organizing packet with literature and more how-to information. Frequently, I would arrive on a campus at 7:00 AM cold, and leave that evening with a new College Libertarian Club in the process of organizing.]

OUTREACH ACTIVITIES – THE OUTREACH BOOTH

A booth at a fair, flea market or student union building can employ a quantitative operation such as the market survey, a petition drive, or a voter registration drive. More often it is used as a qualitative activity used to rally support, recruit, distribute literature, discuss issues, and raise money.

If you are doing a qualitative booth, display a banner proclaiming who you are. This will build your name recognition and draw people who are looking for you. Your booth should also have some other highly visible features or gimmicks to draw attention.

The outreach booth, unlike quantitative events, should encourage dialogue; however booth volunteers should have basic communications skills as discussed herein. If more than one volunteer is at the booth, they should avoid ganging up on prospects (which triggers “shields up”). Whoever first engages the prospect should carry the bulk of the exchange with the other volunteer jumping sparingly, if at all.

The outreach booth should collect names for the data base. Individual forms are preferable to a sign-up sheet on a clipboard. The forms should have check-off options requesting more information and high-interest indicators to help spot potential activists. (It's important to realistically note that for most types of organizations, most members will never become activists.)

OUTREACH ACTIVITIES – ADVERTISING

Advertising is keeping your name and message in front of the people.

A continuing classified ad in your local paper will eventually generate leads on a regular basis.

Electronic media, such as radio or TV, can advertise events or present a position on a key issue. They can also be cost-effective for political campaigns. More spots on fewer stations is more effective than fewer spots on more stations.

Signs are good for building name recognition and conveying contact information, but not necessarily for conveying messages.

Direct mail can be targeted to a special list or neighborhood. Fliers can go on community and campus bulletin boards and delivered door-to-door or car-to-car where permitted by government.

Keys to effective advertising are:

- (1) Simplicity. You are working against a limited attention span.
- (2) Repetition. Continuous exposure to your message should be basic to your advertising strategy. Most people will have to see or hear an ad several times before they respond to it.
- (3) Uniqueness. You need to set your ad apart from the audio-visual overload that we are constantly exposed to.
- (4) Utility. Your prospect needs to know what they get by responding and how your cause will affect them personally.
- (5) Emotional involvement. What makes them *want* to respond? This may or may not be something derived from utility.

OUTREACH ACTIVITIES – DEMONSTRATIONS

Demonstrations are used to draw attention to your cause.

Be careful. In the '60s and '70s, government agents infiltrated peace organizations with the specific intent of inciting them to violence so the groups could be declared subversive. One idiot throwing a rock is often all it takes to inflame an already impassioned mob.

Demonstrations can build your name recognition and issue identification, and focus attention on your issue, especially if it is a well-orchestrated media event. Demonstrations can also rally supporters to further action.

If an opposing side is demonstrating, a counter-demonstration can establish that there is another view and the battle for attention is not lost by default.

Use market communications techniques when demonstrating.

Signs should be large, simple, and unique. Other visual trappings should contribute to uniqueness and theme: Revolutionary War uniforms or tea bags for tax protests, or coffins to protest war or other instances of murder by government.

Flags at demonstrations send affinity messages for any position. Flag burning may be an inalienable natural right and a way to vent anger, but from a tactical point of view, it's incredibly stupid and will cost you far more supporters than it gains.

A simple flier should be passed out at events to explain what you are doing and why.

HIT SQUADS. A "hit squad" is a specialized committee that can organize a protest or counter-demonstration on short notice without having to mobilize large numbers of people.

Fliers can attack enemy speakers, undermining their credibility and asking tough questions.

A dozen people can leaflet any event from a single speaker to a city council meeting. It only takes a few to hand out jury nullification literature at the courthouse on jury selection day.

WHEN YOU NEED A CROWD. When it's important to have more people on a picket line, you can start the demonstration with a well-publicized rally. A small group can look larger on TV if close-up shots are used or if the demonstrators are spread out rather than bunched up. Remember, kids can swell ranks too.

PUBLICITY & MEDIA RELATIONS

The Media Axiom:

“All most folks know is
what they read in the paper (or cyberspace)
or see on the tube.”

PUBLICITY & MEDIA – PUBLICITY OBJECTIVES

A publicity program should contribute to all of the tactical objectives: name recognition, issue identification, education, credibility and growth.

Specifically, your publicity program can increase attendance at outreach events, gradually sway people toward your position or cause, keep your name and cause in the public eye, build your credibility, and place you issue(s) on the public agenda.

The creative exploitation of free media alone is rarely enough to determine the outcome of public conflicts. On the other hand, it's relatively low-cost/high return and very effective as part of a broader strategy.

PUBLICITY & MEDIA – MEDIA RELATIONS

The key to good media is good media relations. Appear and act professionally, and strive to make good media contacts.

DO YOUR HOMEWORK. Your media relations campaign should begin with a media survey: make a list of all newspapers (daily, weekly, campus), magazines, radio stations, TV stations, and wire services in your target area. Then develop an intelligence file on each. You can get information from the yellow pages, web sites, Chambers of Commerce, press organizations, and other sources. Determine coverage, format, market, ownership, bias, and especially key people. (You can also use this information in your paid advertising program.)

ESTABLISH YOUR CONTACTS. The assignment editor of a newspaper or TV station decides what gets covered and can introduce you to the reporters who will cover your cause, event or beat.

The real objective of your initial visit to media outlets should be to make a favorable impression on these contacts. Don't encroach on their time when they are really too busy to talk to you, or get pushy, or be a "crank."

Deal with media people as you would anybody else. Try to keep them reflective, be very friendly, spoon-feed them information in bite-size chunks, be professional and credible, and speak in terms of their values.

Avoid displays of anger towards journalists, and avoid challenging their integrity. As the adage goes, "Never pick a fight with someone who buys ink by the barrel." Once you make them mad at you it's hard to win them back. Remember, you need them more than they need you.

You don't control free media, you can only hope to influence it. Ultimately, what makes ink or air will depend on:

- (1) Their professional interest – the newsworthiness of your event or opinion;
- (2) Your credibility – how you are perceived as a news source; and
- (3) Your relationship with the journalist or editor – whether or not they like you.

Professional journalists will deny the importance of the third factor, but even if they don't realize it, it's there. Honey catches more flies than vinegar.

It should be a primary objective to watch for, create and exploit opportunities to engage the journalist in quasi-social (or purely social) environments: lunch, coffee or cocktails. If you can get on a first name basis with your media contacts, do so, and the sooner the better.

PUBLICITY & MEDIA – MEDIA TOOLS

Don't skimp on media materials. Media costs are a tiny percentage of your overall budget and a little class and professionalism will go a long way.

THE NEWS RELEASE. News releases can be about events or opinions. Events, things that happen, are generally more newsworthy and will get better play. Opinions will work if you are a credible source responding to current events, or an official spokesperson acting in an official capacity. In the latter case, if your organization passes a resolution, use the release as a "cover sheet" for the resolution. A statement can be used in lieu of a resolution. The press release will paraphrase the resolution or statement. Don't force a marginally-interested reporter to wade through a lengthy diatribe to pick out a few choice sound bites. Frequent frivolous or lengthy news releases will condition assignment editors to spot and disregard your releases without reading them.

NEWS RELEASE FORM AND STYLE. Use a consistent and attractive form on a specially-designed 8½ by 11 news release letterhead. The header information should include contact information and a release date or "For immediate release."

Choose a headline that will at once convey to the editor the subject and point of the release, even though a newspaper will likely come up with their own headline.

The body should be double spaced and have wide margins for the editor's convenience. If more than once page, the bottom should indicate "continues" and the top of the following page should have the title and page number. The end should be indicated with a row of Xs or a –30-.

If you want your news releases considered and used, they must be *about* something newsworthy and generate reader interest. They must be relevant, timely and preferably have a local tie. They should be concise and to the point.

Unlike creative writing, release writing starts with the climax and builds down. The lead paragraph contains as many of the five Ws (who, what, when, where, why) as possible. The whole body is written in "reverse pyramid" style so bottom paragraphs can be deleted without affecting the readability of the story.

Some papers will print the release as submitted, others will rewrite it slightly, and still others will rework it so much you won't recognize it. Your job is to write it as though it will be used as is but to also ensure that your facts are right and easy to find in case of revision.

NEWS RELEASE DISTRIBUTION. If your release is local, there are advantages to delivering it in person. This will give the outlet the opportunity to interview you on the spot and you can also cultivate

your media relationship. If the release is about a speaker or candidate, it can be the cover sheet of a media packet with photos and background information. If you deliver the release to a TV or radio station in person, they may want to tape a few sound bites on the spot.

If you want to encourage them to use it as it, provide an electronic version also, on a disk or in their e-mail.

When distance and time are factors, you can e-mail or fax the release. The author has always had better luck faxing releases than e-mailing them. E-mails are too tempting to delete and it seems hard copy in the hand gets more attention. But again, they will have to type the story and will be more likely to revise it. A good play might be to fax and e-mail it, with a cover sheet on the fax alerting the reporter that it has been e-mailed as well.

Editors and journalists are frequently overwhelmed with releases so you should either alert them that it's coming or follow up to ensure they got it.

THE MEDIA KIT. The media kit is an attractive packet of background information about your group, cause, candidate, speaker or candidate included with the release.

Don't overdo it. Giving away mini-libraries can be counter productive. Include a business card, a brief introductory letter, one or two brochures, and perhaps a brief newsletter, or program synopsis. If the kit is about a person, include a bio and two photographs (a mug shot and a candid action shot of the speaker or candidate).

ACTUALITIES. Actualities are taped releases featuring an event. These are immediately delivered to TV and radio stations. The tape should be no longer than a minute with an introduction in the leader. As with other media tools, keys to effective use are timeliness, technical quality, credibility of newsmaker and newsworthiness of event, and personal working relationship with the news editors.

PUBLICITY & MEDIA – THE MEDIA EVENT

THE NEWS CONFERENCE. Unless your speaker/candidate/newspaper is a good, highly credible news draw, or unless you are making a major announcement, it's probably better to try and arrange one-on-one interviews rather than holding a conference. A one-on-one is more convenient for the journalists and may get you better coverage. If you hold a news conference and it is perceived as frivolous, it is unlikely that you will ever get their attention again.

If you decide to hold a conference, schedule it for late morning or early afternoon. Broadcast media needs time to edit for the early evening news, and print journalists tend to not be early morning people as most papers are printed late at night.

The location should be easy to find and get to by media people. Their convenience should be one of your primary concerns. If your subject is attractive enough, you can select a location with relevant visual, historical, political, or social connotation.

Notify the media as far in advance as possible and have a round of follow up calls the day before to remind them.

Start your event on time, keep your speaking program to 30 minutes or less, and allow time for questions. Speaking segments work best when delivered with physical vigor and in short sound bites. If you have a special sound bite you want included, pause just before delivery and then look directly

into the camera, enunciating clearly, and pause again before moving on. This will make that sound bite stand out.

Don't try to develop complicated arguments at news conferences. What journalists want most is quotable highlights. Supplement the vocal presentation with appropriate handouts.

STUNTS AND GIMMICKS. These are events staged specifically for media attention and coverage. Examples are highly visible demonstrations: throwing tea bags in the river at a tax protest, burning somebody in effigy, or giving your military recruiters a birthday cake on the anniversary of the all-volunteer defense force, with a public statement against the draft.

Do give some thought to how the public might perceive the stunt and be careful that the media people don't feel used.

Positive, human interest stuff works well: an award to a newsmaker, a gift to a charity, or performance of a community service. Street theater is an effective technique – be clever and cute.

PUBLICITY & MEDIA – OP/ED FOCUS

LETTERS. Letters to the editor are well read and can build name recognition and issue identification. Letters should be concise, within the word-count guidelines of the paper, and emphasize one point, getting to it quickly.

You can increase the number of letters by having letter-writing parties. Better writers can help less-able writers. A mail coordinator can hold the bundle and mail the letters a few at a time so that the local editor has a steady stream.

Try to mention the name of your group and include a contact number in your letter if appropriate.

You can also monitor letters to the editor for names of like-minded people to contact and recruit.

GUEST EDITORIALS. Guest columns generally run from 500 to 1,000 words and can cover more points than a letter. Some deem them more credible.

If you want to write a series of editorials or a regular column, contact your paper's editorial board and arrange a meeting to sell your idea. Bring along samples of your work.

ADS IN OP/ED FORMAT. If your paper won't run your editorials, you can run them as paid ads. They will have to state that they are paid ads and they won't be on the opinion page, but they will still have the look and feel of a guest column. A regular column can be tagged with "Brought to you as a public service by ..."

TALK SHOW CIRCUIT. The talk show is the broadcast marketplace of ideas. Somebody from your group should make the rounds on a regular basis. Always try to book your out-of-town speakers and dignitaries. Ask for additional appearances to respond whenever opposing views are presented by other guests.

Your talk show squad should be glib, knowledgeable, friendly folks who can keep their cool under fire. Remember, many hosts entertain their listeners by getting their guests riled, especially if the guest is not a "regular."

PUBLISHING

NOTE: This section deals with print media only, primarily pamphlets and newsletters. Web publishing is beyond the scope of this discussion and the expertise of the author.

PUBLISHING – SOME BASICS

It's not enough to just publish. What you publish must be read. You can increase readership by producing professional, attractive pieces that capture and hold the reader's attention.

Enhance readability and attractiveness by use of white space. Increase white space by breaking up long lines of text, using larger typefaces, using broad margins and borders, and using large headlines. Large blocks of text should be broken into titled sub-sections.

Use cartoons, artwork, and other graphics including an attractive logo and masthead, to create an overall visually attractive effect.

Be professional. Get and use the *Associated Press Style Book* and *Elements of Style* by Strunk and White. Proofread carefully. More than one person should proof material before it's printer ready.

Remember that all principles of communication apply to the printed word. Relevant graphics can reinforce suggestions or requests.

PUBLISHING – NEWSLETTERS

PURPOSE AND TYPE. A newsletter can be an "in-house" organ aimed at members and focusing on news about your organization and its operation and activities, or an outreach tool aimed at prospects and focusing on your position or philosophy, or it can be both.

One advantage of separate publications is keeping internal conflicts out of the public eye. On the other hand, news about organizational activity in the outreach publication can help build credibility.

If mass circulation outside of the organization is intended for outreach, emphasize issue discussion over organizational ties. A commitment of time is required to build circulation.

CONTENT AND STYLE. Articles on upcoming events and current issues, well-reasoned and provocative editorials, and factual, persuasive in-depth analysis can be included. Long-winded diatribes, dry narrow-focus theses, obscurities, and pointless rambling should be avoided.

Letters from readers are generally popular if not too long. Regular columns can develop a following. Columns can be tested so available space is used for the most popular columns.

Advertising can be more than just a revenue source. Ads that are relevant to your cause or organization will enhance the overall readability and some readers read publications just for the ads.

With regard to style, humor generally works well. Use of sarcasm is dangerous in the printed word. First-person, "folksy" writing styles should be reserved for signed columns and letters.

A web version of the newsletter can generally increase circulation.

EDITING. The availability of inexpensive desk-top publishing software makes professional newsletter design and layout achievable by almost any group. Basic home computer systems can handle relatively sophisticated volunteer publishing operations. Material can be submitted electronically, edited in word processor applications, and laid out in publishing programs with all manner of graphics scanned in. If you are not tech-able, old fashioned cut and paste layout is still an option.

Somewhere on the top half of the first page should be your masthead – title, logo, date and issue information. Columns are laid out with gutters of white space between columns. Start at least two or three articles on the first page, and include a “What’s inside” teaser to draw attention to other features.

CIRCULATION. The author prefers that newsletters aimed at members only be financed through dues or subscriptions and publications used for outreach be subsidized with copies given away in large numbers. However, if outreach periodicals prove popular, subscriptions, advertising, and bulk-issue sales can help finance other activities.

Newsletters are a non-threatening way to present ideas to prospects. Their shields will be down while they read the publication in the privacy of their home.

PUBLISHING – FLIERS

Fliers are cheap handout items, normally a single page, and normally about a single event or subject.

Fliers can publicize a meeting, rally, debate, speaker, protest or other event. They can draw attention to an issue, a candidate, a recent act of injustice, or a pending imminent act of injustice. They can make a point and a pitch, give information, or solicit inquiries, donations or memberships.

They can be used as mass-mailers, or posted on bulletin boards. On many college campuses, fliers are a traditional and primary means of political and cultural communication. In some places they can be placed on parked vehicles, distributed door-to-door, or handed out to crowds.

Four keys to effective use of fliers are:

- (1) Make them unique and visual.
- (2) Keep the message simple and to the point.
- (3) Suggest or request specific action (attend, write, vote, read, contact, object, etcetera).
- (4) Mass distribute them.

PUBLISHING – PAMPHLETS

A pamphlet is just an advanced flier, typically 2-sided and tri-folded, but sometimes multi-paged. It can do much of what a flier can do but generally is of larger scope.

It’s often a cold selling device that describes an organization and/or develops an issue position. It can also be an instructional piece on some tactic or technique.

The basic principles apply. Use white space and graphics for visually pleasing effect, break up large blocks of text, and use a large enough typeface for comfortable, easy reading.

Physical design features such as fancy paper and multiple colors add a lot to your publication (including cost). Plain and deluxe editions can be field tested to determine if the extra expense for

slicker versions are justified by increased response. Typically, they are.

POLITICAL PROCESSES

The Political Practice Axiom:

“The theory of politics is about ideas.
The practice of politics is about
interpersonal relationships and communications.”

POLITICAL PROCESSES – WHAT POLITICS REALLY IS

Political activists attempt to influence public policy. Public policy is determined by people. Therefore, political activists attempt to influence people.

Who must you influence? Voters, administrators, legislators, judges, juries – the people who make and enforce public – i.e., government – policy.

In an ideal world, your message would stand or fall on its own merit. In the real world, your message will stand or fall on the marketing you do as its proponent.

To effectively effect public policy you must do at least one of two things:

- (1) Be in a position to make the policy (in office).
- (2) Be able to influence those who do make the policy.

Influencing those who make the policy is easier if you are known and liked by the policy maker. Being known and feared may work too, but it’s easier to become liked than feared. Some activists convince themselves of the opposite, but in the process of trying to become feared, they merely become hated, and generally lose effectiveness.

If you want to become a “mover and shaker” in your community, get involved in it. Join the PTA, a service club, the neighborhood watch, a local church, or a charitable project. Go to meetings of the city council, the county commission, and the school board. Does your state legislator know you by your first name?

If the establishment in your community is controlled by a “good ol’ boy” clique, you can be most influential if you are perceived as a good ol’ boy. Remember the Affinity Axiom.

The Affinity Axiom:

“The more people perceive you to be the way they are,
the more receptive they will be to your ideas.
The more people perceive you to be different than they are,
the more you and your ideas will be perceived as a threat.”

An outsider becoming a good ol’ boy is easier said than done. That’s not the way it should be. It’s just the way it is. Of course you can go too far in the direction of conciliation and lose sight of your principles and objectives. But a skilled activist can communicate even the most radical proposal from a position of affinity.

This is not to say that there is no situation that calls for confrontational politics. Confrontation, in the context of this discussion, means *projecting anger*. Sometimes a confrontational approach will win points with a third party observer who is the real target. If a city councilor is a lost cause anyway, your heated public exchange may not win him over but may impress the voters in the audience. And sometimes an especially onerous, high-stakes proposal or action must be stopped at all costs and the failure of honey calls for the desperate use of vinegar.

If your objective is to open up the system and establishment, you may have to address an issue from a confrontational mode, making the system the issue. Certainly, a group that is constantly denied access to, prohibited from addressing, or totally ignored by a local elected body may want to turn up the heat. Still, generally, you will have better results with positive advocacy techniques.

If you can't influence the official, council, board or the voters through positive advocacy, you can:

- (1) Move on and try to keep a good relationship so you can lobby more effectively on the next issue.
- (2) Continue to organize, educate, and focus attention on the issue through non-confrontational methods.
- (3) Become confrontational (and limit your effectiveness on future issues as people tend to stay mad long after they forgot what they were mad about).

“Confrontation” does not mean projecting your strength (through petitions, letter campaigns, public rallies), not does it mean emphasizing disagreement with a policy or proposal. When using non-confrontational advocacy, focus on the merit of the issue and avoid name-calling or attacking the integrity or motives of the opponent, especially if the opponent is a policy maker.

If you become confrontational (openly angry), you are playing on the politicians' fears. They may fear that you will continue to call attention to a bad situation, or a pending bill and get the voters riled up. If voter backlash is your objective, you better be able to deliver.

The more confrontational you become, the more likely the opponents will be to act emotionally instead of rationally, and the more uncertain the outcome is likely to be.

Confrontational politics can be a dangerous game if played wrong. You could alienate the power clique, or even the voters, without focusing enough attention on the issue, or pressure on the policy makers, to effect the desired change (although the resulting controversy could damage your opponents politically). Some politicians thrive on controversy and your confrontational approach could leave you outplayed at your own game. You could also invite retaliation. Politics is a dirty business and people in power know how to use the power, and abuse it.

On the other hand, becoming known as a confrontational crank could make you such a pain in the rear that they avoid tangling with you: like Uncle Remus' tar baby, every time they throw a punch at you, they get bogged down in something messy.

Being a successful proponent through positive advocacy generally involves the four Cs: credibility, communication, connections, and cash.

CREDIBILITY will come from people's perception of your knowledge and the viability of your movement or cause, Become an expert. Be organized and professional.

COMMUNICATION is your ability to convey your message to others, in terms of their values,

language, and agenda.

CONNECTIONS are the people you know who can help you achieve your objective.

CASH will help you acquire the resources to professionally build your credibility and communicate your ideas. It may also help you acquire the connections but be careful of moral and legal pitfalls.

POLITICAL PROCESSES – TYPES

OUTREACH and educational activities indirectly influence public policy by building popular support for your position, cause, or candidate. See previous sections.

POLITICAL activities attempt to directly influence public policy. The basic political activities are:

- (1) REFERENDUM, INITIATIVE, AMENDMENT (discussed below);
- (2) LITIGATION AND JURY NULLIFICATION (discussed briefly below);
- (3) LOBBYING LEGISLATIVE BODIES (discussed in a subsequent section); and
- (4) ELECTORAL POLITICS (discussed in a subsequent section).

SOME POINTS TO PONDER. If your state has a process for initiative or referendum, you may have a great tool for undoing tyranny. Unfortunately, it's used just as often, or more often, to reduce freedom or raise taxes. Before deciding if the time is right to take your cause to the people, consider:

(1) MOOD OF THE ELECTORATE. Conduct a scientific poll. Are there enough proponents and undecided among likely voters to give you a realistic chance? If polling indicates that your position isn't saleable, your resources are probably better utilized on more education and organizing than in an initiative campaign.

(2) THE OPPONENTS. Who will they likely be? How well organized are they? How much money can they raise? The California School Choice proposal was supported by a majority of voters in the early polls but was opposed by the powerful NEA. Opponents were able to outspend proponents by a factor of around 4-1 and that's about what the final vote ratio was.

(3) BALLOT PROSPECTS. Some states require huge numbers of petition signatures to put an initiative on the ballot. Do you have enough volunteers? If you plan to hire professional petitioners be sure to budget realistically. In either case, plan to get considerably more signatures than the requirement to compensate for disqualified signatures.

(4) CAMPAIGN BUDGET. If you get it on the ballot, can you raise enough money to sell it to the voters? To win, you must normally outspend the opponents.

PETITIONING. Some activists consider petitioning distasteful but it's absolutely necessary.

Petitioning is a *quantitative* endeavor. The petitioner's job is to get large numbers of signatures, not to convert people to the cause.

Polished, rehearsed sound bites will work well in this situation. A theme of "let the people decide" will let you emphasize the quantitative: "This isn't a petition to pass term limits, but merely to put it on the ballot and let the people decide."

One approach applies the yes-habit sales technique. Ask two positive-response questions (about

information you probably need anyway): “Are you a registered voter?” and “What county do you live in?” Your prospect has already given you two positive answers so when you follow with “Would you sign a petition to let the people decide?” you are more likely to get another positive response.

Work large crowds. The Post Office, malls, campuses, fairs, flea markets and parades all offer crowds. Be sure to get permission to petition on private property. You can even canvass door-to-door if legal in your area.

The key is to approach large numbers of people. Even if most of the prospects you approach say no, if you approach enough people, you will get lots of signatures.

You must *ask* people to sign. Very few will walk up to a table to sign on their own initiative. If you have good traffic, don't waste a lot of time trying to convince one person: move on.

POLITICAL PROCESSES – LITIGATION AND JURY NULLIFICATION

LITIGATION. Some would argue that litigation is law, not politics. Don't be fooled. The court room is just one more political arena. By our definition of influencing public policy, litigation *is* political activity.

Normally litigation is used to change public policy by challenging the constitutionality of a bad law or by forcing the government to comply with a bad law. If you win, a precedent is established which for practical purposes becomes the law. Disadvantages are that you must have standing as an injured party or criminal defendant, the high cost, and for criminal defendants, jail if you lose.

Organizations like the ACLU are deluged with prospective cases and must be very selective about the ones in which they actually become involved. For more on civil liberties litigation, contact:

American Civil Liberties Union, <http://www.aclu.org>
Institute for Justice, <http://www.ij.org>

JURY NULLIFICATION. Jury nullification is the common-law right of jurors to acquit based on application of the law, justice of the law, or mitigating circumstances. For example, someone who is a peaceful, non-aggressive member of the community carries a loaded pistol for personal protection. A jury can decide that even though a technical violation of the law occurred, the law is unjust and the inalienable right to self-defense takes precedence so they vote to acquit.

The problem with jury nullification is that judges like to reserve these powers for themselves. Unless they are required to inform the jury of this power by a Fully Informed Jury law, they may instruct the jury to rule only on the facts of the case and may even sanction lawyers who attempt to introduce the concept in court.

If your state allows (or requires) judges to lie to juries about this right and power, you can:

- (1) Cheerfully serve on juries when the opportunity arises and inform your fellow jurors about their common law rights;
- (2) Hand out jury nullification literature to people entering and leaving the court house on jury selection days; and
- (3) Contact the Fully Informed Jury Association.

Fully Informed Jury Association, <http://www.fija.org>

LOBBYING LEGISLATIVE BODIES

This section deals primarily with state legislatures, but the basic principles apply to Congress and local bodies as well.

LOBBYING – YOUR APPRENTICESHIP

Before you start lobbying on any specific issue you can develop yourself as a citizen lobbyist. If you receive any compensation or expense reimbursement from your organization, your state government may not fully recognize your constitutional rights to petition government for a redress of grievances or to free speech. Check your state laws.

Learn the process and make connections. Find out what legislative information is available on the web for your state (or county or city).

Pick a few bills and track them through the legislature. Watch committee hearings and take notes. Whose testimony had the greatest impact? Why?

Get to know members of the body you will be lobbying; don't just get to know about them, get to know them personally.

LOBBYING – STRATEGY

DEFENSE. The first objective of a legislative task force of an on-going organization such as a political party, is to monitor legislation for bills that would damage the organization or directly impede the accomplishment of its fundamental objectives. For “minor” political parties, a priority would be stopping changes in election laws which would make it more difficult to exist or get candidates on the ballot. The legislative task force or committee should be prepared to act quickly in reaction to such direct attack bills: anticipate and have legislative allies and expert witnesses lined up.

SUPPORTING A BILL. A second objective is going on the offense passed that restores a freedom, protects a right, or lowers a tax.

Find a quarterback – someone in the legislature who will carry the ball.

Have clear and specific objectives and priorities for the legislation. A single bill aimed at a clear objective will generally do better than several smaller bills.

Work with the sponsor and the sponsor's staff, and other key players in drafting the bill. If the bill is part of a larger national movement, the national advocacy organization will probably have model language.

Anticipate changes and opposition and track the bill closely.

BACKGROUND AND PREPARATION. Do your homework. Know the issue and know the bill.

Know the experts on your side, and get them on board early to be active proponents. The same can be said for all key players; supporting legislators, allied organizations, special interests, and public opinion leaders. And, of course, national advocacy organizations.

THE PUBLIC CAMPAIGN. Before you start, know the public's mood and plan the campaign. You may wish to work only with the legislature without a public campaign, but if you do go public, go all out and do it right.

Have state and regional kickoffs to rally and train the troops.

Communicate with your network; key groups, contacts, volunteers. Develop a newsletter (paper and electronic), a web site, and a phone tree. Let the troops know the plan.

Work the media and have outreach activities. Put together a master plan including all of these elements.

THE LEGISLATIVE CAMPAIGN. Research the legislature. Know who's for, who's against, and who's undecided. Identify and contact key members of key committees.

Prospect "for" legislators for co-sponsorships. Target "undecided" legislators for persuasion. "Against" legislators is your last priority.

Most bills live or die in committee. Plan committee testimony that will include credible expert witnesses and wholesome representatives from citizen groups. Avoid diatribes. Be concise and precise. Emphasize the positive effects of the bill and back up your assertions with plenty of facts and figures, graphically represented to the greatest extent possible.

Stay on top of the bill until it is passed. *Never* assume a "done deal" in the volatile world of politics until delivery is made.

LOBBYING – TACTICS

Eye-to-eye personal contact is the most effective way to lobby an individual legislator. Personal contact is a *qualitative* method. Letters and phone calls are mostly *quantitative*, but are still important as staff members generally record these on a tally sheet.

IN PERSON. Do your homework, plan ahead, make an appointment in advance and be punctual. Be credible and professional – dress, groom and act like a model citizen. Be polite, project self-confidence, and *listen*.

Personalize the issue, explaining how it will affect you. Don't argue or lecture. Don't articulate threats of electoral retaliation – those are always implied anyway and there's plenty of time for that after the legislative session.

Ask for a firm commitment and follow up.

Get to know, and cultivate, the legislator's staff.

IN WRITING, FAX OR MAIL. These are usually read by staff members rather than the legislator, but you never know so write as though the legislator will be the one reading it. Use the proper title and form of address. Your letter should be legible and contain contact information.

State your point up front and keep the rest short. Emphasize practical aspects and make it know if you are a constituent who will be personally affected. Ask for a written response.

Supporting material is of dubious value unless requested, but it can't hurt.

BY PHONE. The same communication principles apply; be polite, calm, specific, concise, and project self-confidence. Ask for a commitment and written response.

Never call anonymously.

ELECTORAL CAMPAIGNS

ELECTORAL CAMPAIGNS – THE DECISION TO RUN

Should you run for public office? In pondering this question, first consider your objectives.

If you are considering running an educational campaign to focus attention on one or more issues, or as an outreach activity for a political party or committee, you may be able to achieve many short-range objectives at a relatively small cost. On the other hand, if you continue to run outreach campaigns you can cast yourself as a fringe candidate and marginalize your party.

If you are considering running to actually get elected, ask yourself some serious questions:

(1) **CAN I WIN?** Review "Elements of Winning Campaigns" [below]. If you are running as an independent or third party candidate, some preliminary polling and district analysis (of demographics and voting patterns) can help you determine if any "outsider" candidate has a chance. Have both major parties held the office? Are the results frequently close?

(2) **CAN MY FAMILY HANDLE THE STRESS AND NEGLECT?** Running a serious campaign is much like starting a new business. It demands virtually every waking hour.

(3) **DO I HAVE THE TIME?** Every waking hour is a serious commitment. Decide before you start if you really have the time. If you are working a 40-hour week and raising a family, seriously question if you can invest the hours necessary to win.

(4) **CAN I AFFORD IT?** Much of your initial campaign money will probably have to come out of your own pocket, especially if you are a newcomer without a track record, or running without party-machine support.

(5) **DO I HAVE THE STOMACH FOR HARDBALL POLITICS?** It can be a dirty business. If you can't take it as well as you can dish it out, or if you get rattled easily, you may not have a candidate's personality.

ELECTORAL CAMPAIGNS – ELEMENTS OF WINNING CAMPAIGNS

Winning political campaigns typically have six things in common. The more of these elements present in your campaign, the better your chances of winning. Each of these factors should be addressed before you announce your candidacy publicly.

[AUTHOR'S NOTE: I've know many Libertarians who have believed and argued that they could do some end run, or take some short cut, or use some magic bullet and pull off an upset. It's possible but

so rare as to conclude, for all practical purposes, that it WON'T HAPPEN. There is no free lunch, no magic bullet, you will not pull off an end run. Do it right the first time.]

The elements:

(1) RESOURCE PARITY. What did the *winner* spend in each of the three previous elections for the office you are seeking? The highest figure is your *minimum* base. If you are running against an incumbent, add *at least* another 25%. If you are an independent or third-party candidate, add *at least* another 25%. Get the money, do everything else right, and you might have a chance.

The Bottom Line Axiom:

"All other factors being equal,
whoever spends the most money, wins.
All other factors are never equal,
but whoever spends the most money generally wins anyway."

(2) SCIENTIFIC RESEARCH AND MARKETING. A campaign is a business with two products aimed at two markets. The products are *the candidate persona* and *the message*. Research polling can help you determine how to position each product for its respective market. A friendly grad student from your local campus could be very useful in conducting early polls cheaply and effectively.

(3) NAME RECOGNITION. When voters don't know anything about the candidates, there is a tendency to vote for the most familiar name, especially for lower level offices. If you own a business with your name as part of the business name, that's a big plus.

(4) FAVORABILITY. In addition to name recognition, you must be likable. Ronald Reagan won not by converting Americans to conservatism but because they *liked* him. Bill Clinton didn't win by converting people to liberalism, but because people *liked* him. (See the Affinity Axiom in previous sections. Sad, but true. If the "average" voter in your district is a one-legged Irishman and the number one sport is tidily winks, you prospects are greatly enhanced if *you* are a one-legged Irishman who plays tidily winks.)

(5) AGENDA AFFINITY. Agenda affinity is the basic communications principle of addressing the voters in terms of *their* issues and issues in terms of *their* values.

The Agenda Affinity Axiom:

"If you want to pursue your agenda,
you must win.
If you want to win,
you must pursue the voters' agenda."

The Constant Values Axiom:

"It's easier to convince people
that your position is consistent with their values
than it is to change their values."

Negative and off-message issues will come up but still, a skilled activist or candidate can communicate even the most radical ideas from a position of affinity. See "Handling Issues,"

below.

(6) CAMPAIGN PLAN. Winning campaigns are generally well planned. A plan is written. A plan is comprehensive. And a plan is something you actually go by.

ELECTORAL CAMPAIGNS – THE MARKET, WHAT VOTERS WANT

THE HARD VOTER. The hard voter is 15% to 20% of the electorate. The hard voter votes on the basis of issues and will attempt to correlate candidates and issues. This market includes many single-issue voters who can be targeted on that basis.

THE SOFT VOTER. The soft voter is 80% to 85% of the electorate. The soft voter votes on the basis of perceptual factors such as name recognition, favorability, party affiliation, and demographic affinity. Soft voters are sold on such factors as your personality, qualifications, community ties, and affinity. *Some* soft voters *think* they are voting on issues but are really voting on perceptions - a Democrat may vote for a candidate who "supports the working man" when in reality the particular Democrat candidate may have a very anti-union record, or a Republican may be perceived as anti-tax when the particular Republican has consistently voted for higher taxes.

IMPLICATIONS. Hard voters and soft voters represent two different markets. Your hard-voter campaign should command about 20% of your resources. Target hard voters with a tabloid addressing key issues and white papers aimed at single-issue voters. The product is the *message*.

The soft-voter campaign should command about 80% of your resources. Target soft voters with a "warm-and-fuzzy" brochure emphasizing qualifications, family, and community ties. The product is the *persona of the candidate*.

Hard voters will cross party lines but third-party candidates may have to deal with the wasted-vote syndrome. Soft voters will cross party lines for candidates with strong name recognition and favorability. Crossover votes occur more in high-profile races - the less the voters know about a candidate, the more likely they are to vote the party line, so name recognition becomes even more important. Generally, more crossover votes come from Democrats than Republicans - "Reagan Democrats."

For third party and independent candidates, virtually all of the votes will be crossover votes. They can come from both major parties, especially if targeting is used.

ELECTORAL CAMPAIGNS – THE CAMPAIGN PLAN

OVERVIEW and THEME. The overview is a summary of the campaign strategy, generally in the form of a narrative. The theme is the *total package* of candidate persona, the message, and uniqueness factors such as campaign colors and logo. The theme should be unique but not bizarre, and *must* be compatible with the values of the voters.

The theme should contain a few - and *only* a few - issues that are strong positives. A positive is any issue on which your position gains more votes than it loses. Conversely, a negative is any issue on which your position costs more votes than it gains. You never know until you poll. Review the *Agenda Affinity Axiom* and the *Constant Values Axiom*.

[AUTHOR'S NOTE: In my seminars, I draw two large circles, overlapping. The first is labeled "What we believe." The second is labeled "What they want to hear." The middle part, the overlap, is labeled

“What the candidate’s issues should be.”]

Campaigning – salesmanship – is emphasizing positives and downplaying negatives. Know your negatives (your opponents will) and have a strategy for dealing with them.

THE TIME LINE. The time line is a chronological outline of the campaign. It is expanded into the campaign calendar and the campaign schedule.

The time line is a crucial element of the campaign plan because timing is so important in politics. Campaigns operate within an election cycle. First there are numerous legal deadlines that can't be missed. A candidate who announces too early becomes a target of potential opponents early and spreads resources too thin by campaigning over too long a segment of the cycle. A candidate who announces too late may have trouble raising money, solidifying the base, and reaching enough voters.

[AUHTOR’S NOTE: "Early" nomination is an abomination for serious candidates. I opposed putting it in my state LP Constitution and the only two times we ever used it were both unmitigated disasters.]

STAGES. Base your time line on the (overlapping) campaign stages below:

(1) GROUNDWORK STAGE: The decision to run is best made at least two years before the election. The groundwork period should take most of the first year. This is the time to thoroughly research your district and to do a preliminary "apprenticeship."

Stalk the office you are seeking. For example, if you want to run for county commission, start attending county commission meetings now. Do *not* declare your candidacy yet. Don't even try to recruit here. Your purpose is to learn the job, meet other members of the public who attend those meetings, meet the reporters who cover the meetings, and make friends with anybody imaginable who is involved with the county commission. If you are serious about winning (as opposed to "outreach" races), *IT IS IMPORTANT THAT YOU VISUALIZE YOURSELF ON THE COUNTY COMMISSION.*

The same applies for state legislature. If that's what you want to run for, get down to your state capitol and watch it in action. Go to committee meetings. Shake hands with legislators of various persuasions. If possible, keep your mouth shut and your ears open as much as you can.

Also during the groundwork period, *start saving money*. Remember, it's like starting a new business.

(2) PRE-ANNOUNCEMENT STAGE: Start formalizing your plan. Start putting your committee and management team together. Continue polling and research. Learn the election code from your state. Start serious fund raising. Time your announcement based on the nomination process, early enough to secure the nomination. If you are nominated by a convention and required to submit petitions, it's a plus to show up at the convention with the petitioning done. If you need a lot of signatures, of course you will need to announce earlier.

(3) NAME RECOGNITION STAGE: This stage focuses on making your name a household word by sheer repetition and exposure. The name recognition stage generally encompasses and overlaps the nominating process. That means you may be involved in establishing your

party credentials and solidifying your base. Commence voter ID operations and continue fund raising.

(4) **ADVOCACY STAGE.** Start field operations. Work on favorability. This stage is the major thrust of the campaign and is concentrated during the last three months.

(5) **ATTACK STAGE.** It would be great if you could avoid this stage, but you must at least challenge your opponents' program. Tread carefully. If you initiate an attack without sufficient name recognition and favorability, you will be perceived as a crank. However, as much as voters say they don't like negative campaigning, they always respond to it. It's best if *someone else* can be the hit man, especially if the attack can be perceived as personal, i.e., character issues, your opponent's DWI arrest. The more you can be perceived as the nice guy, the better. In a three-way race with major-party candidates, let them beat up on each other while you stand back shaking your head in disgust. If you find dirt on you Dem opponent, feed it to your Rep opponent and vice versa. If you attack an opponent's program, kill him with kindness first - comment on how well meaning and sincere he is, then explain why he is mistaken with this particular idea.

(6) **GET OUT THE VOTE (GOTV) STAGE.** Plan to get your voters to the polls. This is a major objective of your voter ID operation. This is especially important [and generally most neglected] by independent and third-party candidates as these candidates typically show a sharp drop in the polls just before the election. GOTV will determine a close race.

FINANCE PLAN. The campaign plan should include a modular, up-datable finance plan. More below.

ELECTORAL CAMPAIGNS – HANDLING ISSUES

Be prepared to handle issues – positives and negatives – in situations where you don't control the agenda. Never lie about your position, but do handle positives and negatives differently. Also, handle issues differently in the campaign mode than you would in the outreach mode. Here are different ways of dealing with issues:

(1) **MACHO FLASHING.** This is phrasing a position in the strongest, most radical rhetoric possible. It's great fun but rarely productive, especially in the campaign mode. You can use it for strong positives in solidifying your base, and you can get away with sometimes if your position is an extremely strong positive in your district. Never macho flash negatives, and even with positives, people react badly to absolutism so be careful.

(2) **EDUCATION.** Education is converting people to your philosophy. This should be an outreach function of your party, not the point of your serious, to-win campaign. Don't try to educate voters: it wastes your time and irritates the voter.

(3) **SOUND BITING.** Sound biting is phrasing positions in concise statements that resonate, reinforce, and sell. Quotable one-liners are the best sound bites of all. *This is the best way to handle most issues most of the time!*

(4) **SOFT PEDDLE.** Soft peddling is de-emphasizing negatives. Have a plan for de-fusing those hot potato issues without lying about your position or letting your opponent choose your negatives as the main issues of the campaign. See example below.

(5) ABANDONMENT. Abandonment is simply refusing to take a position on an issue. This is perfectly legitimate if something really isn't an issue to be dealt with in the office you are running for. Why lose votes by taking *any* public position on abortion if you are running for county commission, or on zoning if you are running for congress.

(6) REVERSAL. This is changing your position based on public opinion. This is all too common, but unacceptable for principled candidates. Let public opinion determine how you handle issues, and which issues you make part of your campaign, but not what you believe.

[AUTHOR'S NOTE: If you think reversal is ok, I hope you will quit reading now because I have no desire to help you win.]

Soft-peddling, example. Here's how the author would handle drug legalization:

OUTREACH MODE: "Since we own our own bodies, we determine what to put into them. So long as we don't initiate force against others, nobody, least of all government, has the right to initiate force against us to dictate which substances we may or may not ingest."

CAMPAIGN MODE: "I've seen first hand the devastation that drugs can do to our children and communities but the government's war on drugs has failed, in many cases is making the problem worse, and violates the rights of law-abiding adults in the process so I think we need to explore alternatives."

The bottom-line position didn't change but the presentation did, and in campaign mode listeners are allowed to perceive the position in the framework of their values. *Remember the Constant Values Axiom!*

Learn more about personal communications by reading "*How to Win Friends and Influence People*" by Dale Carnegie and with material from the Advocates for Self-Government.

ELECTORAL CAMPAIGNS – CAMPAIGN STAFF

A serious candidate generally does not have the time or the expertise to micro-manage the campaign. Among the most important decisions a candidate will make is who will serve on the campaign committee and run the operation.

For each anticipated job: write a job description, list ideal job qualifications, and determine if the job will be performed by a paid staff member, a contractor, or a volunteer. List and prioritize prospective staffers and start putting your team together. If you are serious, there is no reason to depend exclusively on part-time volunteers, even for local, lower level office. You get the campaign you design and pay for. At least try to get a full-time manager and scheduler, even if they are volunteers. Also, you need an especially competent Treasurer as incorrect or late filing of reports can get you into legal trouble.

Remember, a job is a collection of duties. One person can conceivably do more than one job, and a job can be divided among more than one person.

THE INNER CIRCLE. The key members of your team are your inner circle, and the people you need to be in constant touch with throughout the campaign. The key positions are:

Campaign Manager

Campaign Consultant
Finance Director
Treasurer
Research Director
Volunteer Coordinator
Media Coordinator
Scheduler

OTHER JOBS. There's always something to do in a campaign: your manager and volunteer coordinator should always be able to put someone to work as soon as they volunteer. You can always use legal advisors, accountants, fundraisers, office staff, fold-stuff-and-stamp volunteers, phone bank callers, organizers, neighborhood canvassers, advance teams, sign builders, graphic artists, driver/aides, and GOTV drivers. Keep adding to this list.

THE SCHEDULER. The scheduler is one of the most important jobs in the campaign. This individual should be a well-organized "type A" personality, a good salesperson, a researcher, and most of all, a super booking agent.

ELECTORAL CAMPAIGNS – VOTER ID

The phone bank callers and research team should maintain a data base of voters. Phone canvassing of voters should attempt to identify "for" voters, "against" voters, and "undecided" voters (as well as "likely" voters who have voted in the two previous elections and "new" voters). "For" voters are targeted for get-out-the-vote and fundraising. "Undecided" voters are targeted for persuasion. "Against" voters is the last priority. The research team can cross match various lists to the voter list to identify special interest voters for single-issue targeting.

The Targeting Axiom:

"If you want to pick cherries, go to the cherry tree."

Voter ID and tracking should continue throughout the campaign.

ELECTORAL CAMPAIGNS – VOTER COMMUNICATIONS

See the Political Practice Axiom.

Remember that in the end, all communication is to the individual.

SIGNS. Signs are used primarily to build name recognition so sheer volume of exposure is a key element. Other effectiveness factors are simplicity and uniqueness.

PHONE BANK. The phone bank is used for voter ID, targeted advocacy, fundraising, and GOTV. The phone bank can also be used for polling, but this should be done under the guidance of an expert to assure good, useable information.

Elements of successful phone-bank use are volunteer training, tested scripts, phone persona of the caller, soundness of the data on your call lists, and the number of calls – with more calls resulting in more effect.

FREE MEDIA. News coverage can be useful at all stages of the campaign to boost name recognition and favorability. Increase the effective use of free media by establishing personal relationships with

media people, use of professional media kits and releases, news conferences, visits, and gimmicks.

PRINT MEDIA. Your print media will be used mostly during the advocacy stage. Your basic offerings should include an issue tabloid for hard voters, a “warm-and-fuzzy” brochure for soft voters, white papers for specifically targeted groups, and a basic business card. Use a double-size folding business card as a mini-brochure and include a photo.

Elements of effective use of print media include simplicity, visual effect, use of flow-through graphics and consistent theme, and the physical quality of the piece.

ELECTRONIC MEDIA. Radio and TV are used for name recognition, advocacy, and if necessary, the attack. A web site can be especially effective for hard voters, fund raising, and news media relations. Blog is a powerful tool.

A video or DVD, larger in scope than mere TV ads, can be useful for small group events and fundraising.

Elements of effective electronic media use are simplicity, repetition, testing, timing, uniqueness, and emotional appeal.

PERSONAL. There is no substitute for one-on-one voter contact. Make it effective: look the voter in the eye, offer a firm hand shake, flash a big smile, and use concise, clever, sincere sound bites.

ELECTORAL CAMPAIGNS – CAMPAIGN ACTIVITIES

SCHEDULING. There should be a master schedule, kept by the scheduler, and a hard rule that *nobody* – not the candidate, not the spouse, not the manager – schedules anything without coordinating with the scheduler.

TIME. Budget the candidate’s time as you would any other scarce resource. It’s best if the candidate can campaign full time, but whatever time is available should be generally used as follows:

FUNDRAISING	50%
VOTER CONTACT	25%
MEDIA/SPEAKING	15%
STRATEGY/MANAGEMENT	10%

As the management team develops, the candidate can shift time from strategy and management to voter contact and media/speaking. For lower level offices such as county commission or state legislature, more time should be spent on direct voter contact with the goal of personally shaking hands with every voter in the district. For county wide, state wide, or congressional office, direct contact with every voter becomes less feasible and media operations become more important.

The Time Axiom:

“In politics, time is the enemy. Start early, work late.”

[AUTHOR’S NOTE: While I ultimately judge people as individuals, there are a few traits that many Libertarians seem to have in common. Two that especially irritate me as well as hampering our efforts are a self-defeating mind set (I call it the choose-to-lose syndrome) and extreme procrastination. Way too many LP candidates make the decision to run at the convention that nominates them. These are not serious campaigns.]

THE SPEAKING CIRCUIT. The candidate *must* have a multi-purpose stump speech, and the scheduler *must* get lots of bookings. The stump speech will do more than get votes – it will get volunteers and donations.

Keep it simple – no long diatribes or complicated lessons. Remember, a campaign is largely a popularity contest. Use your stump speech to project yourself as wholesome. Watch your manners, avoid personal attacks on your opponents (get somebody else to do this), use lots of humor, and use lots of warm-fuzzy human-interest stuff. Don't argue with voters in public. "I have some problems with your point but I'll take it under advisement" is better than "That's the dumbest idea I ever heard." Make the voters like you, even the ones who disagree with you.

An aide should always accompany the candidate. If possible, candidate and aide should "work the crowd" after the speech. Everyone should leave with printed material. Take lots of photographs. A photo of the candidate *with* someone can be mailed to that someone later with a fundraising pitch.

DEBATES. Debates are a great way for new players to get on the game board. Generally, incumbents have nothing to gain and challengers have nothing to lose by debating. The risk is that the debate can build the challenger's credibility and force the incumbent, who has a record, on the defensive. Likewise, "establishment" candidates will try to keep "outsider" candidates out.

During the groundwork period, search the local newspapers for stories on previous elections and make a list of the venues where the candidates met in debate (or spoke individually). Start cultivating contacts in the sponsoring organizations. All too often, "outsider" candidates learn that they have been excluded from a debate only by reading about it in the paper after the fact. Homework and persistence can make the difference.

If you are excluded from a debate, show up anyway and go on the attack. This is one of the very few instances where it's justified to modify the nice-guy persona with indignation. Make your exclusion, not the debate on stage, the main story.

NEIGHBORHOOD CANVASSING. For races (county commission, state legislature, county wide in some counties) where it is physically possible to contact every voter in the district – which should be your objective – this could be the single most important candidate activity. Because some see this as going door-to-door bothering people, they find it very distasteful. Therein lies a potential edge if your opponents also find it distasteful and decline to do it. There just is no substitute for eyeball-to-eyeball contact between a candidate and voter.

Work off voting lists. You can arrange the data by address and print it so you can do block-by-block. If time permits, you can work the whole block, carrying voter registration forms so you can register new voters (but be aware of registration deadlines). If time is limited, prioritize. Target members of your own party and independents first. If you are an "outsider" in a two-way race with a major-party candidate, your next priority should be members of the other major party. As the voter ID team identifies "undecided" voters, these should be targeted regardless of party.

Ration your time. The number of voters you talk to is more important than the time spent with each voter. (For organizing, the inverse is true. Organizing is a qualitative operation while campaigning is a quantitative operation.) Carry door hangers for folks who aren't home, but plan to re-visit if possible. Keep a brief record of each visit for your voter ID team.

CROWD CANVASSING. Work those public crowds! The fair. The parade. Sunday afternoon in the park. The game. The races. Downtown. Campus. The Club. Church. Conventions. The Senior Citizens' Center. The factory. The flea market. Restaurants and bars. Votes come from people; so to get votes, go to where the people are. And don't forget your own events – rallies and fundraisers.

The drill for working crowds: keep your persona “on,” take an aide (to keep you moving, collect data, and collect donations), ration your time per person (your aide can extricate you from tedious or unproductive conversations), and give *everybody* a handout.

GET OUT *YOUR* VOTE. Plan your GOTV operation early. Start with a plan for absentee and early voters. Once they've voted for you, they can't change their mind and their vote is in. When IDing “for” voters, ask if they need an absentee ballot or a ride to the polls and don't hesitate to arrange either. Keep your phone bank targeting “for” voters in the final days of the campaign, including election day. In the final stage, and especially on election day, constantly assume that you are just *one vote behind* and if you can just get *one more vote* you will win.

The Numbers Axiom:

“The nature of elections is quantitative.
Whoever gets the most votes, wins.”

MAKE YOUR VOTES COUNT. Exit polling, if you can afford it, can help you determine if the election is being stolen. If you are allowed poll watchers, recruit, train and use them. Don't forget to make sure you are on the ballot, including absentee ballots. Libertarians have been “inadvertently” left off ballots before.

ELECTORAL CAMPAIGNS – THE CAMPAIGN FINANCE PLAN

Make a budget, starting with projected spending. Review “Resource Parity” above.

The cost-per-vote will increase with the number of votes you get. Your “base” votes are free or cheap once you get on the ballot, and each tier on your vote pyramid will cost a little more until you approach the magic “win” number at the top (51% in a two way, less in a three or four candidate race), where those last few votes are the most expensive. Major-party incumbents have a larger base, thus a head start. Plan to outspend your opponents, especially if one is an incumbent, and especially if you are a third-party or independent “outsider.”

Plan your campaign strategy and operation first. Then fund the items in your plan, right down to the paper clips. Allow for unanticipated expenses. Work from the campaign time line and create a budget time line. Allow plenty of lead time for raising the money. Develop contingency budgets based on worst-case and better-case scenarios. Planned expenditures should be prioritized.

Plan to have a *minimum* of 10% of your budget up front, and considerably more is better. Most of this may have to come out of the candidate's pocket, especially if the candidate is an outsider.

The finance plan should be detailed, and well organized. Like the time line, the budget time line part of the plan should be referenced daily.

ELECTORAL CAMPAIGNS – THE FINANCE COMMITTEE

Regard the campaign as your business and each member of the finance committee as a profit center.

Start with your known heavy hitters. If they can write big checks, so can their peers. Each additional finance committee member should have a specific area to target: an industry, a special interest group, a neighborhood, a specific event or other part of your program. Each member should have a specific dollar amount as an objective. A shrewd organizer will imply that some members – the heavy hitters – should feel obligated to make up the difference personally if they fall short of their objective.

THE FINANCE DIRECTOR. The finance director is a key player who will chair the finance committee and should be somebody special. This individual plans, supervises, monitors, and reports on all fundraising activities. The job requires good people skills, good organizational skills, and the ability to work under pressure as a crisis manager. The finance director should have credibility – which can be boosted by his or her own generous donation. This person must have time, commitment, connections, experience, savvy, reputation, and drive. A working knowledge of state election law is also required.

ELECTORAL CAMPAIGNS – CAMPAIGN FINANCE: ASKING

The Asking Axiom:
“Ask and you shall receive.”

[AUTHOR’S NOTE: In my seminars, I start this section with a demonstration. I ask everybody to take out a dollar bill and pass it up. As I’m putting the money in my wallet, I explain that it’s really easy to ask for money once you are past the emotional barrier. Most people have a mental block about asking, especially Libertarians. Get over it. Your campaign needs the money and the candidate will get better results than staff members. If you have to, go to a strange town where nobody knows you and panhandle just to get the feel of it. The only alternative, be independently wealthy.]

Five percent of voters will contribute to a political campaign if asked. Very few will contribute on their own initiative.

Know why people give. They *vote* based on perceptions. They *give* based on beliefs and utility.

ASKING – THE PROCESS. Here’s how to get the most out of asking for money:

- (1) Do your homework – know your prospect.
- (2) Send warm-up information before you call.
- (3) Establish rapport with the prospect before you ask.
- (4) Espouse a specific need and ask for a specific amount.
- (5) CLOSE. Don’t just hint – get the money!
- (6) Use pyramid action. Persuade your donors to leverage *their* contributions by getting *their* friends and associates to contribute.

ELECTORAL CAMPAIGNS – FINANCE SOURCES AND TECHNIQUES

SELF. Charity starts at home. Others won’t invest in you if you won’t invest in yourself. The candidate must get the ball rolling.

FRIENDS, FAMILY, AND ASSOCIATES. Are you in business? Do you have vendors? Customers? Club? Church? PTA? Neighbors? Your realtor? Your car dealer? Your doctor? Your lawyer? Old college buddies? And what about *their* associates?

MAJOR DONOR PROGRAM. This activity requires active personal involvement of the candidate.

Keys to success will include: the candidate's personal relationship with the donor, effective targeting, homework, and salesmanship – including the ability to overcome objections and to close. Video presentations have been effectively used as warm-ups for major donor programs.

Heavy hitters are probably going to want to know *how* you plan to win. Keep them well informed and make them feel like an important part of the team.

SMALL DONOR PROGRAM. The keys to a small donor program are *aggressive prospecting* – asking large numbers of potential donors (which should raise a lot of money although only a small percentage of them will actually donate) and *repetitious giving* – targeting previous donors for another contribution (those who have given before are most likely to give again).

Direct mail is the technique of choice, and a good campaign “insider” newsletter can be especially effective. In-hand hard copy is probably most effective but e-mail and web use are increasingly useful too.

Mail should be targeted, should establish need and utility, should be personalized as much as possible, and should make it clear that the reader is asked to *send money*. Mailing lists can be tested. Mail to a small percentage of each list, and the lists that generate the best responses can then be mailed to in their entirety. Different appeals can be tested in the same manner.

The basic elements of a mailer are the carrier (outside envelope), main letter, insert (second chance letter or gimmick), reply card, and return envelope. The well-designed mailer will include all of these elements and will employ flow-through graphics and consistent theme.

Each of the following factors, all testable, can influence the response to direct mail appeals:

- list quality
- targeting [Every list has a common denominator, and thus a basis for targeting.]
- telephone follow-up
- involvement gimmick
- uniqueness of carrier package
- postage
- celebrity endorsement
- letter copy
- color and physical quality
- premiums offered
- response card design

THE PHONE BANK. Telephone follow-up can double direct mail response. Dialogue can overcome objections. Use tested scripts and trained volunteers.

FUND RAISING EVENTS. *Every* rally is part fundraiser, but you should have events specifically for fundraising too.

Fancy formal dinners can be complex and risky but the payoff can be huge. Start early and allow plenty of time for planning and promotion. Keep it as simple as possible but make it appear fancy by using a hotel instead of a restaurant and use volunteers as ushers. Use names on the invitations, get

confirmations by telephone follow-up, assign tables, and keep the menu basic. Use big-gun (name draw) endorsers for brief speeches, followed by the candidate, all of whom must ask, ask, ask!

If more appropriate for your district, you can scale down to something like a BBQ or picnic. But expect the take to be scaled down as well. Auctions can be used at either type of event.

Other fundraiser activities can include coffee klatches and video parties. Raffles, and even better, cash lotteries can be effective too.

YOUR PARTY. Your party may have money available for candidates in key races. These funds are generally very limited. Candidate viability will be a crucial factor in getting assistance from your party, especially if it's a "third" party.

PAC ACTION. Political Action Committees are looking for three things: incumbency, affinity, and access.

It's been said that to get a loan from a bank, you must first prove that you don't need the money. The same might be said about PAC money. The PAC will want to see certified polling results showing that you are indeed a contender. They will also want to see your campaign plan, your finance plan, and your balance sheet.

It would help if your opponent(s) is especially noxious from the PAC point of view. A friend on the PAC board or staff to guide you and be your advocate would be a big plus. Remember, it's up to you (especially as an outsider candidate) to establish your viability and the PAC has absolutely nothing to gain by backing a loser. [Better to back nobody and not risk pissing off the winner.]

REMOTE DONORS. Folks from outside your district who have an ideological interest in your campaign should be invited to contribute.

ELECTORAL CAMPAIGNS – THE LAW

If you are operating on the assumption that it's a free country, you are setting yourself up for a bust. Before you announce your candidacy or accept donations, obtain the election code from your secretary of state's office (or, for federal office, the Code of Federal Regulations, Title II and the Federal Election Guide from the U.S. Government Printing Office).

NEVER trust any bureaucrat to give you accurate information. Get it in writing or have several witnesses.

SOME QUOTES

"It is not enough to stare up the steps. We must step up the stairs."

Vance Havner

"To make the world as it should be, we must succeed in the world as it is."

The Author

"If it's worth doing, it's worth doing right."

The Author's dad

"There is only one way under high heaven to get anybody to do anything – that is by making the other person want to do it."

Dale Carnegie

"Nothing happens without effort, without doing, without resistance; but of course some things seem to. You have to know how to consider things closely."

Tu Li