



Lillian's List
TRAINING

Campaign Camp

November 11-23, 2021

Training Director - Devon Roberts

Conducting some of the fundraising section.

Keeping the training running.

Former fundraising staffer on Congressional campaigns in MI, KS, and IA

Six years at Lillian's List

A fun, nice person

Enjoys talking about campaigns so please feel free to reach out.

About Lillian's List

Recruits, trains, and supports women who are champions of reproductive freedom and gender equity running for office in NC.

Trains women candidates (running at all levels) and campaign staff and volunteers of all genders to run any level of campaign.

New program to recruit women to run at the local level headed.

Lillian's List PAC endorses and funds women at the General Assembly and Council of State levels. These are our Featured Candidates.

Schedule for the training sessions is as follows:

- Thursday, Nov 11 6-8PM Intro session via Zoom
- Saturday, Nov 13 10am-12pm and 1-2:30pm Fundraising (only day with two separate zoom meetings)
- Sunday, Nov 14 10am-12pm and 1-2:30pm - Message Development and Paid vs. Earned Media
- Saturday, Nov 20 10am-12pm and 1-3PM Field
- Tuesday, Nov 23 6-7:30pm Campaign Q&A with campaign professionals, optional but strongly encouraged

Goals for Training

To understand the components of a strong modern campaign.

To learn the foundations of campaign fundraising, communications, and field operations.

To meet other campaign professionals.

To gain resources to use on future campaigns.

To put yourself in a better position to work on a progressive campaign in 2022.

Job Bank

Currently being looked at by candidates and caucus staff.

House and Senate Caucuses are responsible for electing progressive candidates to those chambers. They also hire managers and staff for competitive candidates.

Last chance to join!

Group Norms

Please put your pronouns in your name!

All levels of campaign experience are in attendance.

Assume good intentions.

Be visible as much as possible but especially during the breakout rooms.

Resource Center

SLIDES WILL BE SHARED IN THE RESOURCE CENTER.

Link will be distributed after the 11/20 session.

Contains the pre-recorded trainings you can view on your own time.

- Polling and Targeting
- Social Media
- Personal Narrative

Contains worksheets, templates, and other resources you can use on future campaigns.

Post- training survey is very important!

Icebreaker

Name

City

Something that excites you about working on a campaign!

(Please keep your answers to 1 minute so everyone can speak!)

Campaigns 101

with Deandrea Newsome

Thursday, Nov 11, 6-8pm

Setting the Stage

Goal of training: To provide a base of understanding of how campaigns work and how trainees can plug into campaigns.

Be visible on the zoom call if you'd like!

There will be collaborative portions.

Make sure to have some way to write things down.

Trainer - Deandrea Newsome

US Senate Campaign Chair

Statewide Campaign Manager

Organizing Director

Community Organizer and Advocate

Agenda

- About Lillian's List
- Where to Run
- Basic timeline
- Campaign roles
- How to get involved
- Q&A

Where to Run

President

US Senate

US House

NC Council of State

Governor

Lt. Governor

Atty. General

Secretary of
State

State Auditor

Treasurer

State
Superintendent
of Public
Instruction

Comm. of
Agriculture

Comm. of
Labor

Comm. of
Insurance

Judicial Branch

Supreme Court

Court of Appeals

Superior Court

District Court

NC General Assembly

State Senator

State Representative

Local Municipal Government

County Commissioner

Mayor

City Council

School Board

Register of Deeds

Soil and Water Commissioner

Everyone is qualified to run for office.

There is no education level, job, life experience, income level that makes someone inherently qualified to run for office.

There is no such thing as the perfect candidate.

The main determination if someone can run for office is if they have the **time and flexibility** to campaign and serve.

Questions!

Campaign Timeline

Length of Campaign

President - 2 year campaign (or entire life basically)

Legislative - 11 months

City Council/School Board - 6-8 months campaign

- Start early if you think you'll have a primary to scare away opponents.
 - Open seat means that there is no incumbent in the race.
 - Raising a good chunk of money or gaining critical endorsements will do this.
- Running unopposed can be a shorter campaign
 - Support other candidates!
 - Travel your district/state, never take running unopposed for granted.
 - But do not forget to fundraise...
- Ramp up field operations around 3 months before the election
- If you win your election you are always campaigning (i.e raising money for your next election cycle)

Questions!

Campaign Roles

Campaign roles

- Candidate
- Kitchen Cabinet
- Treasurer
- Manager (paid and volunteer)
- Other staff
- Volunteers

Every campaign is different!



Candidate: the person on the ballot

New or non-elected candidate.

Appointed elected official running for the first time.

Incumbent candidate running for re-election.

Current elected running for a different office.



**Sen. DeAndrea
Salvador**



**Rep. Vernetta
Alston**



**Sen. Natalie
Murdock**

Candidate Pipeline: The path towards higher office

Congresswoman Alma Adams

1. Greensboro School Board
2. Greensboro City Council
3. State Legislature
4. US Congress



Vice President Kamala Harris

1. District Attorney
2. Attorney General
3. US Senate
4. Vice President



**66/100 counties in North Carolina that
have 0 or 1 woman serving on the
County Commission.**

Two jobs of a candidate

- 1) Talk to voters
- 2) Raise money

The manager's role is to create systems so the candidate can raise money and talk to voters.



Campaign Values

Your campaign should reflect the values you are trying to bring to your community. Examples:

If you are trying to promote a fair minimum wage, you should try to pay your team accordingly.

If you value diversity, you should have a diverse team. You should also make sure to educate yourself on Diversity and Inclusion best practices.

Your campaign should be a reflection of your community.

Talk to Voters - VAN or Votebuilder

All registered voters in VAN have a score from strong progressive to strong conservative indicating how they're likely to vote.

Campaigns determine which voters to target with these scores.

Campaigns can pay for access to the VAN through the county party.



Talk to Voters

First, talk to progressive voters to

- Introduce the candidate and why she can win

- Drum up enthusiasm

- Gain donations

Second, talk to **persuadable** voters (people in the middle)

- Introduce the candidate and show contrast between her and her opponent

In a primary everyone is trying to talk to the strong progressives.

Avoid solid conservative voters.

What are some ways campaigns talk to voters?

- The best way to talk to a voter is to canvass door to door (candidate and volunteer)
- Phone bank
- Text bank
- Community events
- Social media and digital ads
- TV/Streaming Ads
- Mail

*Discuss the best methods with your candidate.



Raise Money

First, raise money from the candidate's **personal circle**.

Early funding to launch the campaign and make the candidate seem viable

Second, raise money from people who can **give the most**.

Typically, from people who give to candidates every election and support for an **ideological** or **strategic** reason.

Candidate's team can help raise from lower dollar donors.

Every campaigns determines their own high/low value.

SCHOOL BOARD

\$200 - 6,000

CITY COUNCIL

\$2,000-20,000

MAYOR

\$30,000-550,000

**COUNTY
COMMISSIONER**

\$20,000-150,000

NC HOUSE

\$250k - 550k

NC SENATE

\$500k - 1mil

COUNCIL OF STATE

\$500,000 - 1,500,000

Before agreeing to do something/go somewhere
the candidate should ask herself

**“Am I accessing new or major donors or
reaching new voters by attending this
event/speaking engagement?”**

to determine if it is worth her time.

Questions!

Kitchen Cabinet

- 4-5 people who will commit to helping a candidate from announcement to election day.
 - Volunteers who are close with the candidate before the race starts.
 - However, the Treasurer and Campaign Manager are a part of this team
 - Local
 - Provide emotional support
 - Sounding board
 - Will take on a variety of tasks
 - Diverse

This is a very helpful place to plug in on a campaign and make a big difference!



Common Kitchen Cabinet Duties

- Emotional support
- Provide local insight
- **Expands the candidate's networks**
- Helps raise money
- Helps with website
- Manage social media
- Promotes via social media
- Strategize with candidate
- Forum prep with candidate
- **Helps in the candidate's personal life**

Questions!

Treasurer - very important!

- Handles the income and disbursements and ensures all of the legal financial requirements are being met.
- **Legally** every campaign needs a Treasurer who is **certified** by the State Board of Elections.
- Treasurer must attend a training hosted by the State Board of Elections to become certified and have their name designated with the candidate's filing paperwork.
- In an active campaign the Treasurer should **NOT** be the candidate, candidate's spouse, or campaign manager.
- The candidate and manager should also know the rules and regulations.

Treasurer - very important!

- Can be a volunteer, stipend, or a compliance firm.
 - If you're raising \$50k or more hire a firm to be your Treasurer.
- Has access to the bank accounts and bookkeeping.
- Files the financial reports with the State Board of Elections in a timely manner. VERY, VERY IMPORTANT
 - You could be fined...
- Not typically a daily time commitment
- Does not need to be a professional CPA

HUGE need for Treasurers for smaller local campaigns.

Please indicate in the post-training survey if you'd be interested in being a Treasurer. We are compiling a list.

Questions!

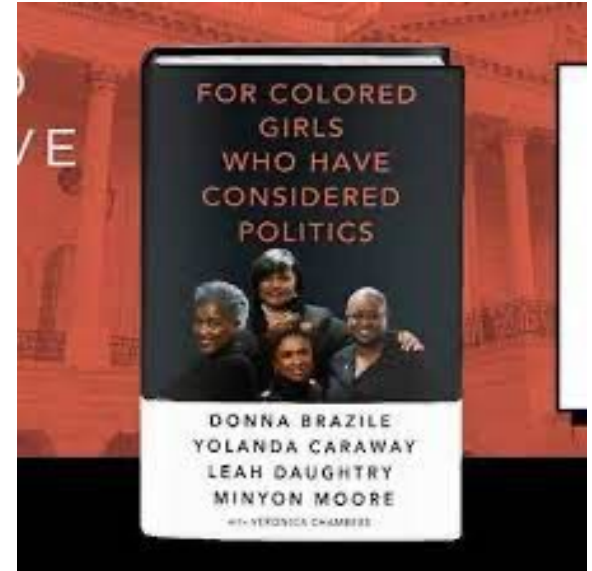
Campaign manager

- Can be part time or full time
- Can be paid a salary or stipend or volunteer
- Estimate that if you're raising \$25-30k or more you should include a stipend for the manager
- Full time manager on a legislative race earns \$3500-\$4500 per month and works about 60 hours/week.

Every campaign is different so the duties of the Campaign Manager vary widely and depend a lot on the needs and skills of the candidate and her core team.

What are some duties of the Campaign Manager?

- Creating and implementing the fundraising, field, and communications plans and providing the candidate with what she needs to do within the plan.
- Dealing with consultants (political, mail, TV, digital) and partners
- Staying on budget
- Delegating tasks to the kitchen cabinet
- Logistics for events
- Setting up phone banks, text banks, or canvasses and managing the volunteers
- Managing social media accounts
- Managing the database or internal systems (voter and fundraising)
- Keeping the schedule
- Website edits
- Writing fundraising emails
- Working with the treasurer
- Crisis management



Other paid staff - it varies

Legislative race - manager, field organizer, interns

Congressional - manager, fundraising director, finance assistant, communications manager, field director, 1-2 field organizers, interns

Statewide - may have social media manager, more finance assistants, and field organizers around the state, interns

Most campaigns pay their interns now.

Entry level roles: typically social media, finance assistant, and field organizer.



Questions!

How to get involved

How to get involved - all campaigns are thirsty for help. Think locally!



Places to look

- County parties need year-round help
- Sign up on a candidate's website
 - Attend a virtual event
- Reach out to incumbents currently in office
 - Incumbents host year-round events
- Lillian's List and other candidate organizations
- 2021 spring and summer start looking for local candidates
- 2022 January-February look for state level races
- Community or neighborhood groups on social media

Post training survey please indicate how you'd like to stay involved.

How do you think you can help?

- Run for office
- Encourage someone to run for office and join her kitchen cabinet
- Join your county's political party
- Become a Treasurer
- Donate to a candidate or candidate organization
- Host a fundraiser (virtual or in person one-day)
- Support a candidate via social media
- Phone or text bank
- Knock doors (summer and fall) (the most help needed)
- Be patient - most of the volunteer work is done in the fall

Questions!

Fundraising

Morning session with Devon Roberts - Lillian's List

Saturday, November 13th 10am-12pm
Budgeting and Timeline

Events

Roloexing

Donating to a political candidate's campaign is another form of political involvement like voting or canvassing.

Donating to a political candidate's campaign is investing in the future of a community.

Donating to a political candidate's campaign is investing in shared values.

Political donations are reinvested back into the community.

Donating to a political campaigns changes who makes up the typical donor base.

Budgeting and Timeline

Write your budget before you decide how much money to raise.



SCHOOL BOARD

\$200 - 6,000

CITY COUNCIL

\$2,000-20,000

**Why are these
such wide
ranges?**

MAYOR

\$30,000-550,000

**COUNTY
COMMISSIONER**

\$20,000-150,000

NC HOUSE

\$250k - 550k

NC SENATE

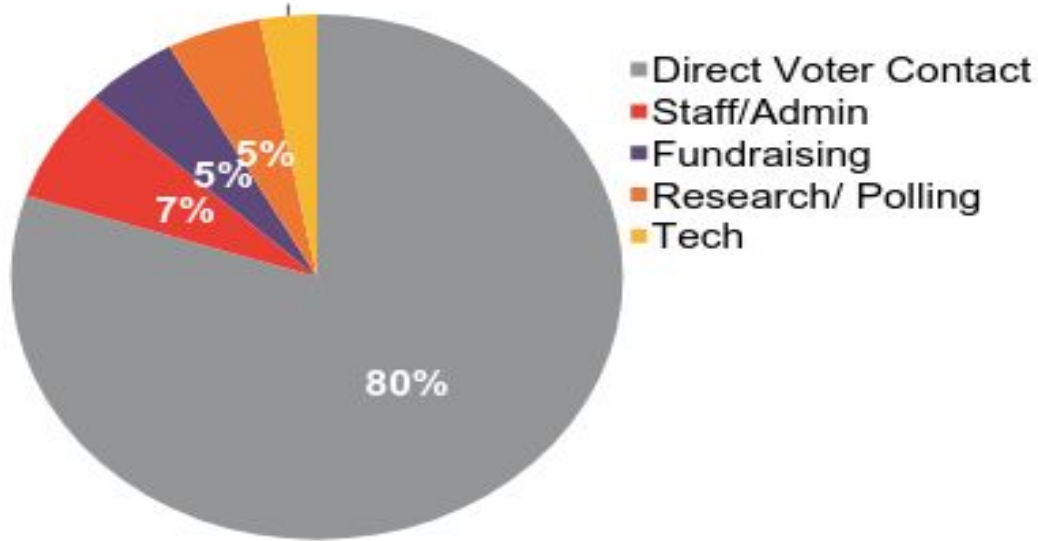
\$500k - 1mil

COUNCIL OF STATE

\$500,000 - 1,500,000

Be thrifty, pay attention to your budget

Campaign Budget Breakdown



Direct Voter Contact

- Mail
- TV ads
- Yard signs
- Digital ads
- Palm cards/literature
- Radio ads
- Print ads

There will be a sample budget in the resource center.

Budgeting Tips

- Draft a **high, medium, low** budget - fundraising is hard to predict
- If you're raising more than \$25-30k include at least a stipend in your budget for your staff.
- Rewrite your budget if you need to
- Get quotes from vendors before you commit
- Research campaign expenditures from other campaigns via the Board of Elections
 - Look for a race similar to yours in a similar year
 - Running in 2022 -> look at 2018
 - Look at candidates who won and lost and how they spent their money
 - Look for vendors that you can also use
- Determine what is a high-dollar donation for your campaign

Approximate Campaign Costs

- Legislative campaign manager earns approx \$3500-4500/month based on experience
- Mail \$10-12k per mailer depending on mailer size and rural/urban
- TV Ad (filming and ad buys) \$200,000 at least
- Palm card/Literature \$3000
- NGP/Votebuilder \$200/month

There is a sample budget in the Resource Center.

Timeline

****Divide campaign timeline into 3 distinct time periods****

1. Getting set up

- Database, website, email address, digital calendar, social media accounts
- establish committee with state board, hire compliance firm or find treasurer
- Campaign team (kitchen cabinet, manager, volunteers)
- Logo, headshots, business cards/walk cards, letterhead, post cards
- Campaign plan (budget, fundraising plan, field plan)
- Introduce candidate to the community

2. Building period

- Raise money and reserve resources for final push, limit costs to bare necessities, adjust budget as needed
- Reach persuasion voters and drum up support among known progressive voters
- Work on key endorsements
- Additional staff necessary?

3. Sprint to finish

- GOTV - Get Out The Vote
- Every spending decision should increase voter contact and mass communication
- Ignite your donor and volunteer network to maximize GOTV efforts
- Spend to zero!

Compliance 101 - the briefest rundown

The candidate will likely have a treasurer or a compliance firm.

Filing reports: Will need the Treasurer to be active during these times

- 10 Day report: 10 Days after you filed your committee
- Quarterly reports -
 - Find these dates on the BoE website and mark them on your calendar
 - You will need to help prep for these reports for several days before filing
- 48 Hour reports
 - Special reports for approximately two weeks before the election for individual donations over \$1000

Learn these dates! Plan ahead!

Taking Contributions - Yeses and Nos

No

- Taking cash over \$50
- Checks from businesses
- Checks from 501c(3)s
- Blank checks
- "In name of" someone else than the signer

Yes

- Checks from individuals
- Donations up to \$5,600
- Credit card donations
- Check donations
- Checks from registered PACs

Best practices for taking donations

- Make a paper contribution form to collect donor's information:
 - Name, address, employer, occupation, phone, and email
 - Check Box for over 18 and US citizen
- Note received date for reporting
- Make a copy of all checks!
- Get a credit card company
 - ActBlue - is very common
 - All of them take a portion of the donation

Source Codes/Avenue Tracking

- You NEED to know where the donation came from.
- In NGP each individual donation is given one Source Code so the database knows the source of that donations.
 - Ex: FebMailer, JuneMailer, RoeEmail, JonesFundraiser
- Keeps things organized and allows you to accurately evaluate trial and error.

Questions!

Rolodexing

No candidate runs alone.

The purpose of rolodexing is developing a personal circle donor/helper group that other candidates don't know or can access.

Rolodexing your candidate is an important early exercise to do.

We are going to rolodex ourselves to get the hang of it!

Exercise

We will be listing our networks and this will be the basis for the rest of this morning's training.

Reminders

1. No pressure! This is about growing your network so if your list doesn't look like someone else's that's ok.
2. Don't expect to remember every single person you know right away today.
3. Your rolodex is a living document
4. Every campaign team looks different and should be based on the needs/skills of the candidate

Groups you're involved with

What is a group? Formal or informal?

Formal could be your sorority, informal could be your high school friends. Both count.

1. 3-5 groups you're very involved with
2. 3-5 groups you're semi involved with
3. 3-5 groups you used to be involved with

(Whatever involvement means to you in your life.)

Examples

- Friend or family groups
- Professional groups
- Quarantine pod
- Neighborhood groups
- Hobby groups (in real life and online)
- Social media groups
- Volunteer organization
- Clubs
- Parent groups
- School groups (alumni associations, PTA, children's friends parents)
- Inside and outside of the state
- Faith groups

Another way to do this is to think about the timeline of your life. Where were you at the different stages of your life and who were you interacting with?

Discussion

- What were some of the groups you listed?
- Was there something that you listed that you have never thought of as a “group” before?
- Did anyone feel like they need more groups? What tips may you have for each other to find networks?
- Knowing that the groups you participate in help you politically, are there any you would like to become more involved in?
- Do you feel like your groups overlap networks too much?

Start your rolodex

Step 1: List 3 people from each of the groups you are involved with.

- Must be people you have some form of contact information for. Feel free to scroll through your phone to boost your memory.

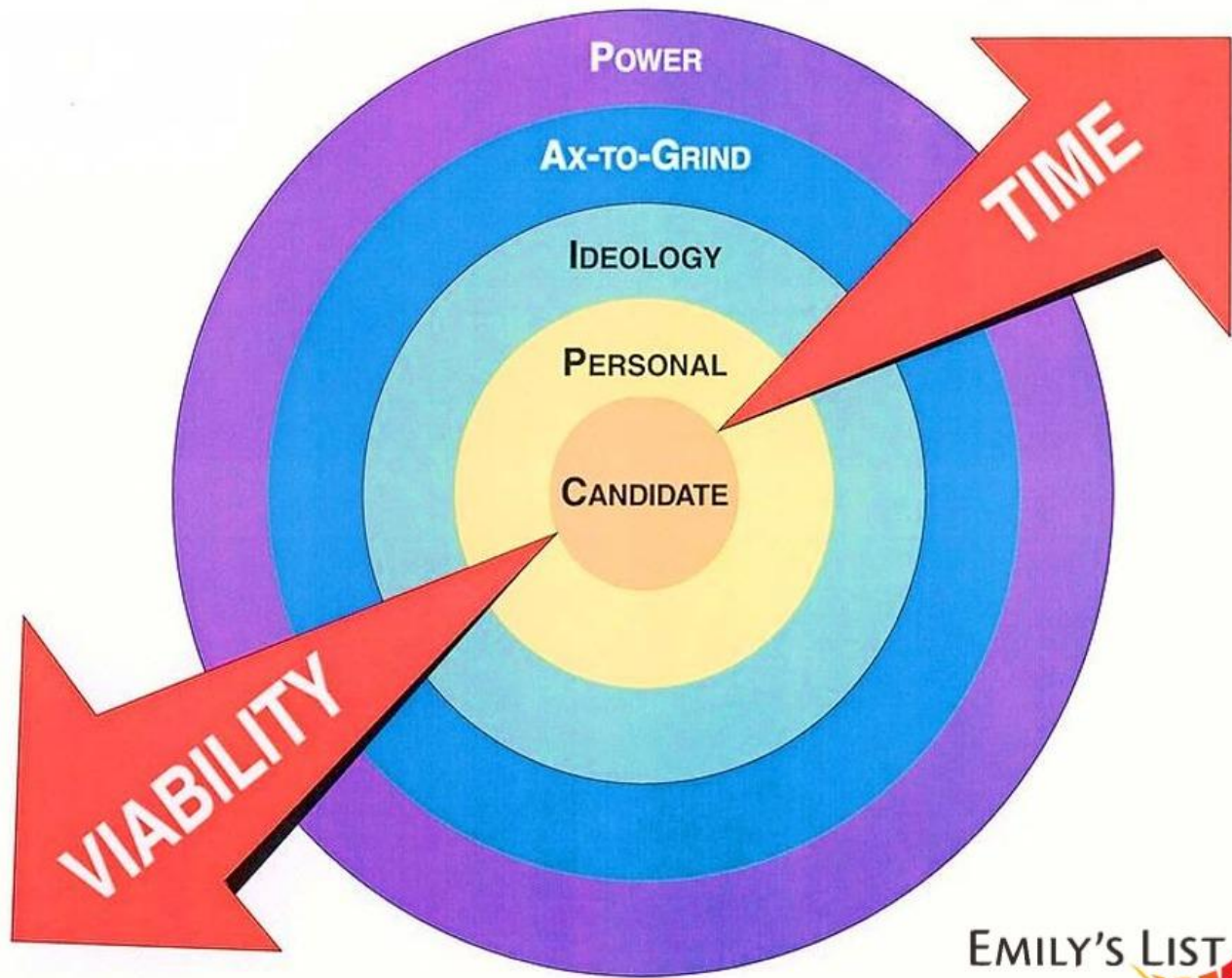
Step 2: Next to everyone you've listed, write down how much money you would ask them to donate to your campaign.

- Add up how much you raised.

Discussion

- What did this exercise teach you about your networks?
- Where do you feel your strengths are in your networks?
- Do you have any questions for the group about growing your networks?

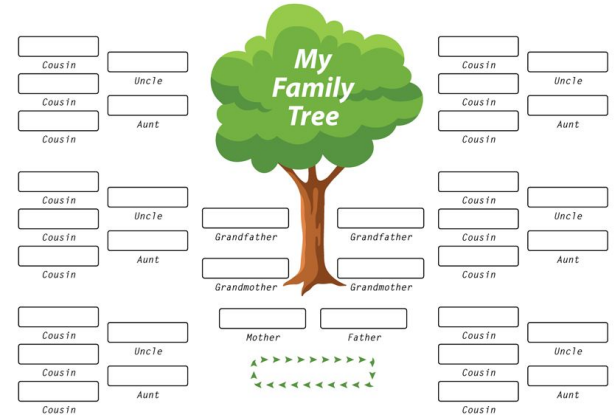
Collect business cards, add people on social media, join social media groups for your hobbies, update your rolodex often, requests member lists of groups you're a part of, be outgoing, join groups you don't mean to be super involved with...



Rolodexing tools

Start from the beginning

- When you were born, who did your parents tell they'd had a baby?
- Who do you remember from elementary school? Middle school? High school?
- Who were your neighbors as kids?
- What after school activities did you do?
- Who babysat you?
- Are you still in touch with any teachers you had?
- What church did you attend as a child?
- Who are your parent's friends?
- What jobs did you have in high school?
- Who came to your high school graduation party?
- What clubs were you in in college?
- Who lived in your dorm?
- And on and on...



www.FreeFamilyTreeTemplates.com

Resources (don't make this hard on yourself!)

- Family Tree
- Spouse's network
- Rolodex your parents, siblings, close friends, etc
- Social media
- Yearbooks
- Alumni networks, sororities and fraternities
- Invitation lists (bat mitzvah, quinceañera, grad party, wedding, baby shower...)
- Holiday card list
- Neighborhood association membership
- Clubs and hobby groups
- Volunteer organization

Tips for rolodexing

- Make your rolodex a Google spreadsheet you can access from all devices.
- Don't put pressure on yourself, it won't help your memory.
- Go slowly rolodexing yourself, budget a lot of time
- Rolodex in stages on different days in case more people remembered
- Rolodex the candidates spouse, parents, siblings, and closest friends
- Crowdsourcing contact information if necessary
 - Work with your partner/sibling/parent to help jog your memory
- Be organized! Spreadsheet!

	A	B	C	D	E	F	G	H	I
1	Where did you meet?	First Name	Last Name	City	Job	Email	Phone	Expected contribution	In district?
2	Mom	Jane	Doe	Chicago	Retired	mom@fake.com	847-555-9008	\$1,000	No
3	Dad	John	Doe	Chicago	Retired	dad@fake.com	847-555-9009	\$1,000	No
4	Through friends	Anna	Holmes	Cary	Small business owner	anna@fake.com	919-555-6782	\$200	No
5	Fomer colleague	Pete	Russell	Raleigh	Attorney	pete@fake.com	919-555-9549	\$5,200	Yes
6	Dem party meeting	Greg	Baker	Raleigh	Retired	greg@fake.com	919-555-8764	\$200	Yes
7	Dem party meeting	Hannah	Jergens	Cary	Baker	hannah@fake.com	336-555-5836	\$250	Yes
8	Lillian's List event	Jessica	Porter	Raleigh	Stay at home mom	jessica@fake.com	(919) 555-2673	\$1,000	Yes
9									
10									

Questions!

Events

**What experiences do you have
with campaign fundraisers?**

Was the goal amount raised?

Did it seem like people had fun?

Host/Steering Committee

- Formal group of volunteers who help promote the event.
- Look for committee members who 1) have the time to devote to this 2) have networks of people who will attend 3) have networks that have not already been introduced to the candidate.
 - Bonus if the people have served on a committee before

What the committee needs from you

- Event details: logistics, graphics, realistic timelines, anything else promotional
- Fundraising support: instructions on how to ask for donations, fundraising goals, brainstorming help, written sample emails/texts/phone scripts they can use, technical support
- Details about the candidate so they can convey her message
- Rolodex them to get 20-25 names of people they could potentially invite
- Be encouraging and check on them!
- Set them up early with systems to raise money for the event so you can focus on other things!

What do you need when planning an event?

1. 6-8 weeks lead time is the gold standard
2. Be explicit with host (s) about expectations? Who is handling what?
 - Goal
 - Is the host solely responsible for building attendance? Or split with the campaign?
 - Walk the host through how to maximize their network
 - Catering - keep costs low! (3% of total amount raised)
 - Rsvps
3. Candidate should do calls to build host committee **EARLY**
4. Invitation and ActBlue/NGP link
5. Create a tracker (tab on finance plan!)
6. Reminder & TY emails
7. Run of show
8. Registration Table: Name tags, contribution forms and online giving
9. Questions!

In-Kind Donations

- The monetary value of a material or service contributed to a campaign
 - The catering at a campaign fundraiser hosted in someone's home. The homeowner who paid for the catering will report the cost of the catering to the campaign which will count as an in-kind donation.
 - The amount of an in-kind donation cannot exceed the \$5600 rule.
 - The value counts towards the total amount that the candidate raised but it is not money the campaign can spend so it is not as good as a direct donation.
 - **The treasurer should collect receipts from the purchaser for the report.**

Entertainment

- **It's ok if there is none.**
- PUT TOGETHER AN AGENDA also called a "run of show." Map out the times of things and who is responsible for what.
- No matter what the candidate gives a speech. Usually it's a longer version of her stump speech. She MUST thank the host and host committee. Someone MUST introduce her.
- In-person you need less entertainment, people can mingle. Usually you bring in another elected who will say nice things about the candidate.
- Zoom fundraisers need entertainment: cooking display, comedians, music, games, a compelling speaker...
- 90 minutes is the perfect amount of time for an in-person fundraiser, Zoom 90 mins is the absolute max

Event Communications

- **The more money you are raises the earlier you need to announce.**
 - An LL fundraiser with a goal of \$60k was announced 3 months in advance. A \$10k event was given 4-6 weeks.
- MOST donations come in towards the end. Virtual events are very last minute sign ups.
- Make a communications plan that includes email, social media, mail or any other mediums.
- Make graphics in Canva for all social media platforms. Use the right size graphic. Schedule in advance. Look at what other groups do.
- Follow up with everyone who attended or donated with a thank you and a recap of the event! Sometimes this includes a follow up ask.
- **To not follow up is rude!!!**

Questions!

Fundraising

Afternoon session with Sharlese Hall - Democratic Governors Association

Saturday, November 13th 1-2:30pm

Donor Research

Call Time and Making the Ask

Building a Fundraising Plan

Donor Research



Why is it important to research donors?

- Confirm candidate has the best possible contact information to help optimize their time call time hours (we'll go more in depth with call time soon)
- Ensure the candidate is asking for an appropriate amount
- Help guide conversations with donors by offering candidate relevant background on each donor

Contact Information

Check NAME

- Many life events can change a person's name, always double check
- Do they have a nickname?

Check EMPLOYER/OCCUPATION

Research PHONES NUMBERS & EMAILS

- Check voter file information, whitepages, beenverified
- Try to verify all numbers before putting them in front of a candidate, even if it came from candidate's cell phone

**REMEMBER: Someone will always
tell you if you asked for
TOO MUCH MONEY - they will
rarely tell you if you
DIDN'T ASK FOR ENOUGH!**

Giving History

What are you looking for?

- Largest recent contribution amount
- Most frequent contribution amount
- Patterns

Where do you find it?

1. Public campaign finance records: www.ncsbe.gov/campaign-finance
2. Follow The Money, comprehensive state giving history
3. Open Secrets, comprehensive federal giving history

**There is a guide to looking up finance records in the Resource Center.*

Biographical Information

A quick google search can reveal a lot.

Information to include:

- Professional biographies
- Groups, clubs, activities
- Sponsorship history
- Family history
- Recent news articles or mentions
- Potential conflicts (if any)



What information would you include in a biography for a person with a limited internet presence?

Call Time



CALL TIME IS SACRED

40% - 50% of your budget will
be raised via call time.

Call Time Basics

- **Single best way to raise money.**
- Be prepared!
 - Know what donors you're calling each day.
 - Set priority calls.
 - Anticipate your candidate's questions and know the answers!
- Keep a strict schedule
 - Build in time to prep call lists and draft new scripts.
 - Vary call time hours (days, evenings, weekends) to increase chances of reaching donors
- Make it easier for you and the donor by being ready to take their donation over the phone via credit card



Call Time Basics Part 2

- Keep good data!
- Develop a follow up system.
- Create a comfortable but productive call time environment.
- Don't use call time to discuss other business.
- You control the flow in the room.
- Know your candidate!
 - Know what motivates them and what frustrates them.
- Be persistent!



Call Time Tracking

DAILY CALL TIME TRACKING											
Date	Hours Scheduled	Hours Completed	Dials	Dials/ Hour	Connects	Connects/ Hour	Connect Rate	Pledge Number	Total Amount Pledged	Amount Pledged/Hour	Universe
11/8/2021	4	3.75	57	15.20	6	1.60	10.53%	3	\$7,500.00	\$2,000.00	HD1 Prospects
11/10/2021	8	8.5	70	8.24	20	2.35	28.57%	12	\$16,000.00	\$1,882.35	Resolicits
11/13/2021	3	2	24	12.00	3	1.50	12.50%	1	\$500.00	\$250.00	Rolodex Recalls
				#DIV/0!		#DIV/0!	#DIV/0!			#DIV/0!	
				#DIV/0!		#DIV/0!	#DIV/0!			#DIV/0!	
WEEKLY TOTALS	15	14.25	151	10.60	29	2.04	19.21%	16	\$24,000.00	\$1,684.21	

Why the metrics matter?

- Motivation
- Tracking goals
- Scheduling
- Course correction and planning

Call Time Follow Up

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1					Day 0: Candidate phone call and pledge (Email 1)	Day 2: Email 2-Reminder (Finance Director)	Day 4: Email 3-Reminder (Candidate)	Day 6: staff call (Finance Director) and send mailing	Day 9: Staff Call 2 (Campaign manager)	Day 14: Staff Call 3 (Finance Director)	Day 15: Candidate call (either donation received or pledge is dead)	Day 29: back in the call rotation to try to get a new pledge	Donation amount	Donation versus pledge	% donated vs pledged	Date of donation	Pledge to Donate spread (days)
2	First Name	Last Name	Pledge	Donated or NO													
3																	
4																	
5																	
6																	
7																	
8																	
9																	
10																	
11																	
12																	
13																	
14																	
15																	

Follow up is crucial to a successful call time program! Create a follow system that works for your team but remember these rules:

- Lay out a clear follow up process and stick to it!
- Same day follow up for pledges.
- Follow up on voicemails within 24 hours.
- Voicemails - 3 pings, 2 weeks, resubmit!

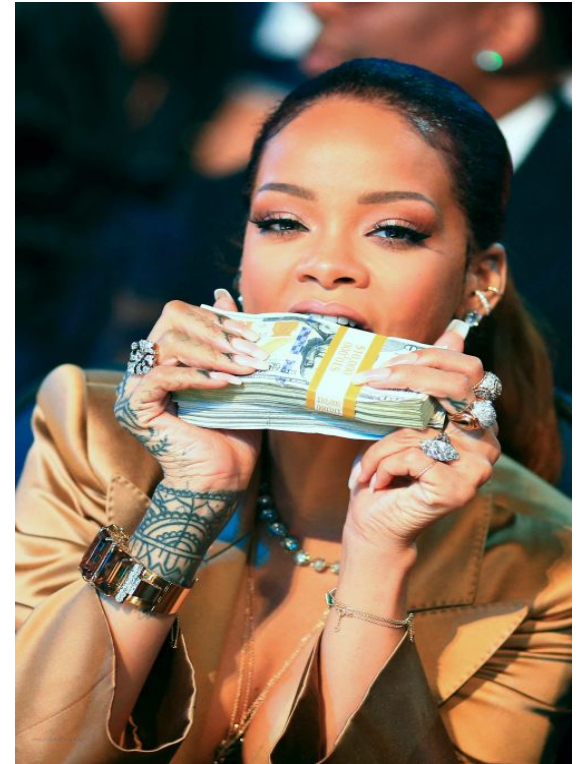
Script Writing and Making The Ask



Making the ask

1. Introduce yourself and what you're running for.
2. Make a connection with the donor.
3. Outline why they should invest in your campaign by identifying mutual interests/stating how you can win/contrasting yourself with your opponent
4. Ask for a specific amount.
5. After you make your ask STOP TALKING.
6. Let them fill the silence.
7. No matter what happens thank them for their time.
8. These basics apply for communication outside of call time as well.

Create a sense of urgency!



Build Your Own Script!

Take five minutes to draft your own script. In breakout rooms, you will share your scripts with one another!



Call Time Coaching

- Review the script with the candidate. Make sure their tone is reflected and it feels natural.
- Always make the ask.
- Use tangible examples when coaching.
- Never assume you know what happened on the other end of the phone. If you have questions about what happened during a call - ask!

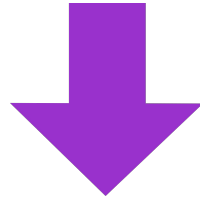
Questions

Building a Fundraising Plan

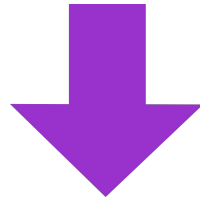
A fundraising plan...

- Is where you map out your path to hitting your cycle goal.
- Allows you to account for all fundraising pathways in one place.
- Sets goals by reporting period/quarter/month.
- Tracks your progress to goal.
- Is a living document that is updated regularly.
 - Tracks goal for each pathway, amount raised, and amount outstanding.

Pathway



Tracker



Fundraising Plan

Total for entire campaign

Monthly goal

Quarterly goals

1		155,000		0.2	0.2	0.2	0.2	0.2	0.25	0.25	0.1	0.4	
2				\$				31,000	\$			23,250	
3				\$ 6,200	\$ 6,200	\$ 6,200	\$ 6,200	\$ 6,200	\$ 5,813	\$ 5,813	\$ -	\$ 2,325	\$ 9,300
4		Income by Qtr		20% of Total					15% of Total				
5				1st Qtr					2nd Qtr				
6		Overall		May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Jan	Feb
7	Call Time	77,500		3,100	3,100	3,100	3,100	3,100	2,906	2,906	-	1,163	4,650
8	Events	15,500		620	620	620	620	620	581	581	-	233	930
9	Face to Face Meetings	7,750		310	310	310	310	310	291	291	-	116	465
10	Direct Mail	23,250		930	930	930	930	930	872	872	-	349	1,395
11	PACs	15,500		620	620	620	620	620	581	581	-	233	930
12	Digital	3,100		124	124	124	124	124	116	116	-	47	186
13	Miscellaneous	12,400		496	496	496	496	496	465	465	-	186	744
14	Total	155,000		6,200	6,200	6,200	6,200	6,200	5,813	5,813	-	2,325	9,300
15													

Fundraising pathways

Goals by pathway for overall campaign

Actuals by pathway/month

Sample Fundraising Tracker for a State House Race

Sample Fundraising Plan by Quarterly Goal

	A	B	C	D	E	F	G	H	I	J	K	L	M	
1		October 2021			November 2021			December 2021			Q4 Totals			
2		Projection	Actual	Difference	Projection	Actual	Difference	Projection	Actual	Difference	Projection	Actual	Difference	
3	Call Time	\$6,000.00	\$6,000.00	\$0.00	\$6,000.00	\$2,800.00	\$3,200.00	\$7,000.00	\$0.00	\$7,000.00	\$19,000.00	\$8,800.00	\$10,200.00	
4	Events	\$3,500.00	\$3,500.00	\$0.00	\$4,000.00	\$2,400.00	\$1,600.00	\$2,000.00	\$0.00	\$2,000.00	\$9,500.00	\$5,900.00	\$3,600.00	
11	Meetings	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00	
12	Emails	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00	\$500.00	\$1,500.00	\$0.00	\$1,500.00	\$3,500.00	\$1,500.00	\$2,000.00	
13	Direct Mail	\$0.00	\$0.00	\$0.00	\$1,250.00	\$250.00	\$0.00	\$1,250.00	\$0.00	\$1,250.00	\$2,500.00	\$250.00	\$2,250.00	
14	Misc	\$250.00	\$250.00	\$0.00	\$250.00	\$48.00	\$202.00	\$250.00	\$0.00	\$250.00	\$750.00	\$298.00	\$452.00	
15	TOTALS	\$11,750.00	\$11,750.00	\$0.00	\$12,500.00	\$5,998.00	\$5,502.00	\$12,000.00	\$0.00	\$12,000.00	\$36,250.00	\$17,748.00	\$18,502.00	
16			97.92%			49.98%			0.00%					
17													Goal	\$36,000.00
18													Left to Raise	\$18,502.00
19													Percent to Goal	49.30%

Sample Fundraising Plan by Quarterly Goal Expanded

	A	B	C	D	E	F	G	H	I	J	K	L	M
1		October 2021			November 2021			December 2021			Q4 Totals		
2		Projection	Actual	Difference	Projection	Actual	Difference	Projection	Actual	Difference	Projection	Actual	Difference
3	Call Time	\$6,000.00	\$6,000.00	\$0.00	\$6,000.00	\$2,800.00	\$3,200.00	\$7,000.00	\$0.00	\$7,000.00	\$19,000.00	\$8,800.00	\$10,200.00
4	Events	\$3,500.00	\$3,500.00	\$0.00	\$4,000.00	\$2,400.00	\$1,600.00	\$2,000.00	\$0.00	\$2,000.00	\$9,500.00	\$5,900.00	\$3,600.00
5	111321Hall				\$2,000.00	\$1,750.00	\$250.00						
6	112521TG				\$1,500.00	\$150.00	\$1,350.00						
7	121421Holiday				\$500.00	\$500.00	\$0.00	\$2,000.00					
8													
9													
10													
11	Meetings	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00
12	Emails	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00	\$500.00	\$1,500.00	\$0.00	\$1,500.00	\$3,500.00	\$1,500.00	\$2,000.00
13	Direct Mail	\$0.00	\$0.00	\$0.00	\$1,250.00	\$250.00	\$0.00	\$1,250.00	\$0.00	\$1,250.00	\$2,500.00	\$250.00	\$2,250.00
14	Misc	\$250.00	\$250.00	\$0.00	\$250.00	\$48.00	\$202.00	\$250.00	\$0.00	\$250.00	\$750.00	\$298.00	\$452.00
15	TOTALS	\$11,750.00	\$11,750.00	\$0.00	\$12,500.00	\$5,998.00	\$5,502.00	\$12,000.00	\$0.00	\$12,000.00	\$36,250.00	\$17,748.00	\$18,502.00
16			97.92%			49.98%			0.00%				
17												Goal	\$36,000.00
18												Left to Raise	\$18,502.00
19												Percent to Goal	49.30%

Questions

Multichannel Fundraising

This information is explained in a separate video
linked in the Resource Center.

What are different ways we raise money?

Multichannel fundraising: reaching out to the same pool of donors via multiple mediums

Commonly done through email, call time, fundraising letters, and in person asks.



Contact information

- Deeply important to gather as much as possible before you are a candidate.
- Try to have phone **number, email, and address** for everyone but one form is good too.
- Calling people at work is usually ok but not healthcare professionals, teachers, or people with assistants.
- Everyone will eventually be contacted multiple times in as many ways as you possibly can.

Email fundraising

- NGP (very common campaign database) or MailChimp
- Have a schedule and plan for who will draft, proofread, and send
- Lower ROI than you'd expect
- Just YOUR personal email address list when you start
- Consider a newsletter of some sort
- Vary what time of day you send your emails
- Unsubscribers are normal for every email
- **Be very mindful of your tone**
- Read other campaign emails for ideas

Create a sense of urgency

- Every 4-6 weeks give previous donors a new reason to donate.
- “We need to raise \$500 by tomorrow to reach our monthly goal. Will you donate \$25, \$50, or \$100 today to help me reach my goal?”
- “Our opponent just came out as anti-choice. Will you donate \$20 today to make sure I can defeat him?”
- “We’ve had 80 individual donors this month, will you help us reach 100 with a donation of \$5 today?”
- “We just got word our opponent is going up on TV. Will you donate \$50 TODAY to help me share my TV ad across the district?”

Always ask for a specific dollar amount.

Mail

- Read the donation letters you receive for an idea of how to write one. Save examples you think are powerful.
- Costs money but is easy to budget for
- Consider timing of the postal system
- DONOR CARD AND REMIT ENVELOPE
- It's never just a letter
 - Follow up email
 - Follow up call time



In-person/one-on-one donor meetings

- High dollar donors (whatever that means to you)
- Exclusive
- A larger use of the candidate's time than any other fundraising method
- Be prepared
- Also consider if a donor has broader connections
 - Is a politician or community leader
 - Has access to other donor networks and can advocate for you
- Fairly rare - try to make them happen early in the campaign

How to respond

"That's too much"		Negotiate
"Not ready."		Call back
"Need more info"		Provide it
"No."		Why?

ALWAYS SAY THANK YOU!

Team effort

The candidate will ALWAYS be the best person to raise money for her campaign. The candidate will always be the best advocate for her campaign.

However, she doesn't have to do everything. What are ways other people can help you raise money?

Team effort

- Introducing the candidate to potential donors
 - Setting up meetings, introducing via email, inviting personal network to candidate's events
- Donor research
 - Downloading other candidate's reports from the SBOE
 - Looking up phone numbers or addresses
- Stuffing mail
- Keeping the database organized
- Pledge follow-up
- Preparing call time lists
- Writing call time scripts (vary the message)
- Drafting emails and letters
- Call time buddy
- Serving on an event host committee
- Doing call time to low dollar donors

Message Development

with Pia Nargundkar - Lillian's List

Sunday, November 14 10-11am

About me

- Spent eight years working as a strategic messaging consultant in Washington, D.C.
- Worked for presidential campaigns, national issue advocacy groups, foundations, unions, etc.
- Spoke on TV and at conferences around the country about progressive messaging goals

What is a message?

A message is a short and accurate statement that tells voters why they should vote for your candidate and provides a contrast between your candidate and their opponent.

A message is not...

- A slogan
- A policy platform
- A vague generality

An effective message...

*Is concise

→ A typical 30-second TV ad is just 76 words long

[Candidate] is running for the legislature because health care costs are out of control, and premiums in North Carolina are among the highest in the country. She is going to stand up to the politicians who vote to protect health insurance companies, and prevent them from jacking up premiums, denying claims for pre-existing conditions, and limiting access to birth control and cancer screenings for women.

An effective message...

*Meets your community where they are

- Know your audience - their values & concerns
- You have to make an initial connection in order to move voters along

It is natural to worry about safety in public spaces. We should advocate for safer public facilities, but this doesn't do that...

An effective message...

*Doesn't give airtime to your opponent's viewpoint

- You want to rebut your opponent's views without repeating them, especially since there's a chance your persuadable voter has not heard from the other side yet

~~*My opponent says I don't care about public schools but...*~~

As a graduate of Wake County Public schools and a longtime PTA member...

An effective message...

*Is tailored for your candidate and campaign

- Every election cycle has resonant issues, and national and statewide dynamics, but your message should not be able to be copy/pasted for another candidate

~~*[Candidate] believes in strong environmental protections.*~~

As a former environmental lawyer, [Candidate] will help hold Duke Energy accountable for their negligence in the Dan River coal ash spill.

An effective message...

*Fits into the overarching frame

→ Every message is a building block for why your candidate is the right choice

FRAME: [Candidate] is a pragmatic progressive with a history of getting things done

MESSAGE PROOF POINTS: Passed x law, fought y company successfully, etc.

5 Keys to an Effective Message

- Concise
- Meets people where they are
- Doesn't give airtime to your opponent's viewpoint
- Is tailored for your candidate and campaign
- Fits into the overarching frame

Fix this message:

- *Bad:* As a former obstetrician, [Candidate] believes unequivocally that a woman's right to choose should be unassailable.
- *Better:* As a doctor, [Candidate] helped countless women and their families make important healthcare decisions. She strongly believes in people's right to access abortion and other reproductive healthcare.
- *Because:* The average American reads at a seventh grade level. Use concise and simple language!

Fix this message:

- *Bad*: [Candidate] will fight against right-wing activists looking to censor books and whitewash the history our children learn in schools
- *Better*: [Candidate] disavows the comments our Lt. Governor made about our teachers. As a School Board member, [Candidate] will fight to ensure teachers are supported, and our children receive the quality education they deserve.
- *Because*: Always tie national issues to a local angle to make it more personal to voters and relevant to your specific campaign

The art of the pivot

- Sometimes, a shift in circumstances will require you to break from your planned communications frame
 - COVID-19
 - Breaking news
- These changing circumstances may require you to pivot from your original message.
 - New realities on the ground mean you shift to focus on something else
 - A reporter asks a question and you move to answer it on your own terms

BREAKOUT EXERCISE

Breaking News

- Your candidate has run a campaign with the frame of accountability. She is running for county executive, and has promised to clean up corruption and end the cronyism of the former executive.
- A local paper breaks the story that in her previous office position, she had employed her husband on payroll.

Exercise

- In your breakout room, discuss how the campaign should respond. What would you advise the candidate to say? How about staffers and/or surrogates?
- **Write a brief statement (no more than 4 sentences) that your campaign would release to reporters. Your statement should contain a pivot.**
- We'll discuss strategies when we meet back in **10 minutes**.

Additional tips

- Your message should be cohesive across all platforms
 - Website
 - Social Media
 - Literature
 - Candidate speeches and interviews
- That being said, you can tailor messages depending on the medium
 - Digital - can utilize links to more info; infographics and memes if that fits the persona of the campaign; always looking for that “viral” content
 - In-person - need to be more prepared for interruptions; more possibility for back-and-forth conversation

Additional tips

- Remember - you can't control everything
 - You have to work with the policy positions of your candidate and often, the priorities of the party or top of the ticket candidates
- It can be helpful to find a messenger you like / is similar to your candidate and try to emulate the positive things they do

Questions?

pia@lillianslist.org



Paid vs Earned Media

with Molly Rivera - Planned Parenthood South Atlantic

Saturday, November 14, 12-1:30pm

About me

- Communications Director at Planned Parenthood South Atlantic
- Previously worked for ACLU of North Carolina
- Live in Raleigh
- Served as campaign manager for two city council races while in college. One was successful and one was super not.

Paid Media

- TV ad
- Digital ad
- Paid social media ad

Earned Media

- News coverage
- Op-Ed
- Letter to the Editor
- Social media

**Do you have experience with paid
or earned media?**

What can earned media do for you?

- Increase name recognition of the candidate
- Define your candidate on issues
- Contrast your candidate with their opponent
- Amplify your candidate's message
- Share your values
- Serve as an extra "touch point"
- **Reach voters!**

...all on a budget!

What can paid media do for you?

- Increase name recognition of the candidate
- Define your candidate on issues
- Contrast your candidate with their opponent
- Amplify your candidate's message
- Share your values
- **Reach voters when the free stuff didn't work**
- **Target voters**

So how do you get this free (earned) media?

Build relationships with reporters

Be responsive, helpful, and fast

Follow-up and be persistent

So how do you get this free (earned) media?

Use social media

Use the moment

Be consistent and responsive

Keep it local

Earned media tactics

- Press releases
- Media advisories
- Press conferences
- Issue-based events like roundtable discussions
- Large events like rallies
- Touring local businesses
- Meet-and-greets

Earned media tactics

- Speeches at popular local events
- Inviting a reporter to knock doors with you
- Write compelling op-eds and letters to the editor
- Do something newsworthy
- Effectively use Twitter
- Use other social media, including going live

When to use which tool

Press Release

- Shape the narrative around breaking or developing news
- Good for announcing actions PPSAT is taking, like filing a lawsuit, endorsing a candidate, or advocating for/against a bill
- Sent to full media list or more targeted subset

Media Advisory

- Good for giving a heads-up to the press about an upcoming press conference, teleconference, or event like a rally or legislative hearing.
- They are short and always list the following things: What, Who, When, Where.

Statement

- Good for “raising your hand” in reaction to anticipated or breaking news that is well-known and you need to work quickly.
- Send a quote directly to a smaller group of journalists you know are interested in a topic or covering the issue.
- Or tweet it!

Date → **FOR IMMEDIATE RELEASE**
September 3, 2020

Headline and subheadline → **North Carolina Abortion Providers And Reproductive Justice
Activists File Sweeping Litigation Challenging Multiple
Abortion Restrictions**

Restrictions disproportionately impact Black North Carolinians and people in rural areas

Contact info → **CONTACT:**
Planned Parenthood South Atlantic: Molly Rivera, molly.rivera@ppsat.org or 919-438-1109

Lede → **RALEIGH** — Abortion providers in North Carolina and SisterSong Women of Color Reproductive Justice Collective today filed litigation challenging several medically unnecessary abortion restrictions that have pushed abortion out of reach in the state and stigmatized essential health care.

Most important background info → Decades of attacks on reproductive rights and health care access by state legislators have already led to provider shortages and inadequate public health infrastructure in the state, with the COVID-19 pandemic only exacerbating these issues. The discriminatory policies violate civil and reproductive rights and disproportionately impact North Carolina's communities of color, particularly Black communities, as well as rural communities.

- The restrictions being challenged include:
- A licensing scheme that arbitrarily singles out abortion providers with medically unnecessary and onerous requirements
 - A ban on qualified advanced practice clinicians (APCs), such as physician assistants, certified nurse-midwives, and nurse practitioners, from providing abortions
 - A ban on the use of telehealth for medication abortion
 - A requirement that providers deliver state-mandated biased counseling with no medical benefit to their patients
 - A mandatory delay for patients seeking an abortion of at least 72 hours after they receive state-mandated information.

**Persuasive quotes
AKA your statement** → "This web of abortion restrictions in North Carolina harms our patients, full stop," said **Dr. Katherine Farris, Planned Parenthood South Atlantic's Chief Medical Officer**. "These barriers serve no medical purpose. Instead, they interfere in patients' decisions about how and when to become a parent and ultimately endanger their health and well-being. Each person deserves access to quality, affordable abortion in their community, provided with dignity and respect, and we will continue to fight for our patients, no matter what."

"Our patients deserve to access abortion without having to jump through the many hoops state legislators have implemented," said **Kelly Flynn, President & CEO of the A Woman's Choice clinics**. "These restrictions force our patients to travel long distances and delay their care, and they force us, the providers, to give them medically unnecessary, biased information about abortion. We're ready to fight in court to strike down these harmful restrictions."

More background → Access to abortion is limited in North Carolina as a result of decades of political attacks that reached a fever pitch under former Governor Pat McCrory. During the McCrory-Forest administration, 11 abortion facilities were [shut down](#), leaving 91 percent of North Carolina counties without an abortion provider and disproportionately hurting rural communities. And politicians showed they'd stop at nothing to chip away at abortion access even further. Then-Speaker of the House Thom Tillis [infamously](#) added numerous abortion restrictions into a motorcycle safety bill as a backdoor attempt to quietly erode reproductive rights on the final day of the 2013 legislative session.

The plaintiffs in the case are Planned Parenthood South Atlantic; SisterSong; A Woman's Choice of Charlotte, Inc.; A Woman's Choice of Greensboro, Inc.; A Woman's Choice of Raleigh, Inc; three doctors; and one advanced practice clinician. They are represented by Planned Parenthood Federation of America, the American Civil Liberties Union (ACLU), the ACLU of North Carolina, and the Center for Reproductive Rights.

End → -END-

Advocates to Rally Saturday in Raleigh in Support of Abortion Access

← **Headline and subheadline**

“Rally For Abortion Justice” part of nationwide demonstration

CONTACT: Molly Rivera, 919-438-1109 or molly.rivera@ppsats.org

← **Contact info**

RALEIGH — On Saturday, October 2, people across the country will come together to rally for abortion justice in response to Texas’ near-total ban on abortion. Advocates in Raleigh will join more than 700 events happening in all fifty states during a national day of action.

← **Lede**

WHAT: “Rally For Abortion Justice,” including a planned march and rally with speakers who have had an abortion and other advocates

WHEN: Saturday, October 2, 11:00 a.m. - 1:30 p.m.

← **What, when, where, who**

WHERE: Bicentennial Plaza, [1 E. Edenton Street, Raleigh, NC 27601](#)

WHO: ACLU of North Carolina, Carolina Abortion Fund, El Pueblo, Inc., Muslim Women For, NARAL Pro-Choice NC, National Association of Social Workers North Carolina, NC NOW, Planned Parenthood South Atlantic, PSL Carolinas, SisterSong, Triangle Abortion Access, and other advocates for abortion access

[Abortion justice](#) recognizes that legal protections do not guarantee access to health care and that systemic racism, economic insecurity, and immigration status make it harder for people of color, people experiencing financial hardship, and people who are undocumented to obtain an abortion.

Decades of attacks on reproductive rights and health care by state legislators have already made abortion inaccessible for many people across the country. In North Carolina, a web of medically unnecessary restrictions prevents many people from accessing abortion, inflicting serious harm on patients, particularly people of color, people who live in rural parts of the state, and people experiencing financial hardship. 91 percent of North Carolina counties do not have an abortion provider today.

← **More background**

More information can be found at: <https://act.womensmarch.com/event/oct-2-2021-march/2492?source=map&akid=>

← **Link for more info**

What do reporters need to make news?

- News – new information
- Context – what does it mean
- Direct, clear answers
- Quotes or sound bites
- Perspective

Timing is everything

When to send

- Press releases or statements should be sent within the hour of breaking news. The sooner the better.
- Be mindful of broadcast outlets and help them meet their deadlines.
- Good timeframes are usually:
 - 10 - 11 a.m.
 - 2 - 3 p.m.
 - *(Give them time to put it on the noon and 4 p.m. broadcasts.)*
- Send media advisories a couple of days in advance.

When it comes to the media, it can't wait.

Op-Eds and Letters to the Editor

Op-eds and LTEs give you the opportunity to get your candidate, volunteer, or supporter in the media expressing their opinion or stance on an issue, without having to get a reporter to write it.

Op-eds

- Longer form (~500-750 words)
- Can be about more broad topics, but usually timely and in response to something newsworthy

LTEs

- Short (150 words)
- Usually written in response to an article, editorial, op-ed, etc. to assert a point of view
- Summarized in 1-2 points
- Structure
 - “A recent article/editorial...”
 - Thesis sentence
 - 1 point to back it up
 - close

Molly Rivera: McCrory no moderate on abortion issues

Regarding the Dec. 25 column [“7 things McCrory has done for N.C.”](#): Rob Christensen characterized Gov. Pat McCrory as a “moderating influence” on abortion issues. But McCrory broke his 2012 campaign promise to not sign any new restrictions on abortion, and instead signed several extreme measures into law.

Thanks to McCrory’s “moderating influence,” North Carolina now has the longest waiting period in the country, forcing women who have decided to have an abortion to wait an arbitrary 72 hours to have the procedure. This law forces a woman to endure an unnecessary and potentially harmful delay before receiving the care that she and her doctor have decided is right for her.

Also thanks to McCrory’s “moderating influence,” we now have a law requiring that doctors provide copies of ultrasound pictures to the Department of Health and Human Services, creating a stockpile of intimate medical records in a government agency.

McCrory was many things when it came to abortion issues, but moderate was not one of them.

Where to begin?

Do these things first!

- Press list
- Messaging and talking points
- Editorial calendar
- Media training and prep
- Introduce yourself to key reporters
- Put media contact info on website
- Follow reporters on Twitter

Media training

Let's go ahead and cross this one off the list!

Responding to media inquiries

- Respond to media inquiries quickly (within the hour at least, if not half hour).
- Reporters are almost always on very quick deadlines — they often need to speak with someone within the next couple of hours, so time is always ticking.
- Here's what to say:
 - Thank them for contacting you for their story.
 - Tell them you are looking into it right away to see if someone is available to speak with them.
 - Ask them for their deadline.
 - Ask if it's on camera, over the phone, or if an email statement will suffice.
 - Then get back to them with an update ASAP, even if only to say that we're not available.
- Don't be afraid to pick up the phone.

Types of interviews

- Phone
- TV - live and pre-recorded
- Radio - live and pre-recorded
- Zoom

Dos and Don'ts

Dos

- Prepare and practice regularly
- Take a beat
- Start over if talking on the phone or a recorded interview
- Be clear, concise, and bold
- Answer the question you *want* to be asked
- Come back to your value statements
- Stay on message.
- Repeat your message. A lot.
- Be authentic and confident
- Use plain, accessible language

Don'ts

- Use jargon
- Make a statement without evidence to back it up
- Go “off the record”
- Make off-the-cuff remarks
- Repeat opposition claims or opponent statements
- Miss a deadline

Preparing your candidate

- Craft your main message(s)
- Anticipate questions and craft responses, especially tough ones
- Craft your pivot
- Practice, practice, practice

The pivot

- “That’s an important issue, but what this topic is really about...”
- “I can’t speak for X, but I can speak for my campaign which is focused on...”
- “Here’s what I know right now...”
- “I don’t know about X, but what I can tell you about is...”
- “The real issue here is...”
- “I can’t speak for them, but what I can tell you is...”
- “What’s most important here is...”
- “The evidence doesn’t support what they said but, what it does tell us is that...”

Let's practice!

Questions?

Field

With Virginia Reed - Campaign Manager

Saturday, November 20 10am-12pm

Field Basics

Voter Contact

About Virginia

- Currently: Legislative Assistant to Representative Joe John (D-Wake) at the North Carolina General Assembly
- Previously: Campaign Manager for two state senate, one state house, two city council campaigns; Executive Director of the Wake County Democratic Party
- Graduate of Appalachian State University
- North Carolina native
- Participated in this very training, Class of 2015!

What is direct voter contact?

- Making an individualized contact with a voter
- No matter your fundraising situation, direct voter contact is a highly necessary and effective way to win

Most common methods

- Knocking on doors (or doing a lit drop!)
- Dialing the phone (or sending texts!)
- Writing postcards
- Relational organizing

Terms you'll hear along the way:

- Votebuilder/MiniVAN
- Turf
- Phonebank/Virtual Phonebank (VPB)
- Support scores
- Win number
- GOTV (Get Out The Vote)
- Canvassing/Door knocking
- Literature (lit) drop
- Textbank
- Poll greeting
- Postcards
- Relational organizing
- Persuasion
- Mobilization
- "Touches"
- Contact rate

Why is field effective?

- Allows for specific targeting of your persuasion and mobilization universes
- A unique interaction is likely to stick in a voter's brain

What's a win number, and how do I find mine?

- It's as simple as it sounds: how many votes do you need to win your election?
- Turnout in the last 3 similar elections divided by 3×0.52
- If you're running in a new district, you'll need to use precinct-level data to calculate your win number

What do I do with my win number?

- Using **scores** - separate your universe into base, turnout, and persuasion targets

SCORES

- You can find scores, which are assigned to individual voters based on a LOT of data (voting history, age, race, religion, education level, donor history, volunteer history, etc.) in Votebuilder
- Two most important scores:
 - **Support score**- how likely a voter is to support a progressive candidate, 0-100
 - **Turnout score**- how likely a voter is to turn out in a *particular* election, 0-100

NC SD - 024		2020 Turnout										Total People
		0 to 9.99	10 to 19.99	20 to 29.99	30 to 39.99	40 to 49.99	50 to 59.99	60 to 69.99	70 to 79.99	80 to 89.99	90+	
2020 State Senate Support Score	0 to 9.99	708	2598	180	4	116	581	935	4,764	2,825	24,375	37,086
	10 to 19.99	402	2199	216	0	87	366	456	1,860	992	5,337	11,915
	20 to 29.99	261	1,319	123	4	69	225	284	1191	498	2,766	6,740
	30 to 39.99	300	1,569	121	1	48	236	230	968	752	2155	6,380
	40 to 49.99	315	1,939	156	0	45	228	201	904	491	1908	6,187
	50 to 59.99	281	1,854	201	0	46	207	189	743	491	1798	5,810
	60 to 69.99	303	1,778	213	0	33	205	205	682	496	1948	5,863
	70 to 79.99	323	1,888	277	0	35	204	209	790	532	2250	6,508
	80 to 89.99	451	3,121	434	0	100	353	462	1494	826	3,320	10,561
	90 to 100	757	4,613	523	1	137	740	966	4,525	3,570	20,186	36,018
Total People		4,101	22,878	2,444	10	716	3,345	4,137	17,921	11,473	66,043	138,323

Dem Base	27,902
Rep Base	33,529

Turnout Projection	95772
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Candidate Conversion

Population	138,323	Base Tier 1	27,902	TO Tier 1	1,570	Persuasion T1	4,733	65.00%	3,076	Scenario 1 TO deficit:	13,474
Turnout %	69.24%	Base Tier 2	9,591	TO Tier 2	9,899	Persuasion T2	8,603	55.00%	4,732	Scenario 2 TO deficit:	3,883
Turnout	95,772	Base Tier 3	1637	TO Tier 3	4,815	Persuasion T3	1,235	50.00%	618		
Win number	49,801	Total Base	39,130	Total TO	16,284	Total Persuasion	14,571		8,426		
Vote Deficit	21,899										
Vote Deficit at 70x70	12,308										

NC SD - 024		2020 Turnout										Total People
		0 to 9.99	10 to 19.99	20 to 29.99	30 to 39.99	40 to 49.99	50 to 59.99	60 to 69.99	70 to 79.99	80 to 89.99	90+	
2020 State Senate Support Score	0 to 9.99	708	2598	180	4	116	581	935	4,764	2,825	24,375	37,086
	10 to 19.99	402	2199	216	0	87	366	456	1,860	992	5,337	11,915
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	70 to 79.99	323	1,888	277	0	35	204	209	790	532	2250	6,508
	80 to 89.99	451	3,121	434	0	100	353	462	1494	826	3,320	10,561
	90 to 100	757	4,613	523	1	137	410	966	4,525	3,570	20,186	36,018
Total People	4,101	22,878	2,444	10	716	3,345	4,168	17,921	11,473	50,043	138,323	

Dem Base	27,902
Rep Base	33,529

This is our BASE UNIVERSE! We have to make sure these folks vote.

Population	138,323
Turnout %	69.24%
Turnout	95,772
Win number	49,801
Vote Deficit	21,899
Vote Deficit at 70x70	12,308

Base Tier 1	27,902
Base Tier 2	9,591
Base Tier 3	1,637
Total Base	39,130

TO Tier 1	16,284
TO Tier 2	9,899
TO Tier 3	4,815
Total TO	16,284

Persuasion T2	8,603	55.00%	4,732
Persuasion T3	1,235	50.00%	618
Total Persuasion	14,571		8,426

deficit: 13,474
 Scenario 2 TO deficit: 3,883



NC SD - 024		2020 Turnout										Total People
		0 to 9.99	10 to 19.99	20 to 29.99	30 to 39.99	40 to 49.99	50 to 59.99	60 to 69.99	70 to 79.99	80 to 89.99	90+	
2020 State Senate Support Score	0 to 9.99	708	2598	180	4	116	581	935	4,764	2,825	24,375	37,086
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	80 to 89.99	451	3,121	434	0	100	353	462	1494	826	3,320	10,561
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Total People		4,115	22,878	2,444	10	716	3,345	4,137	17,921	11,473	66,043	138,323

Dem Base	27,902
Rep Base	33,529

Turnout Projection	95772
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Base Tier 1	27,902
Base Tier 2	9,591
Base Tier 3	1,637
Total Base	39,130

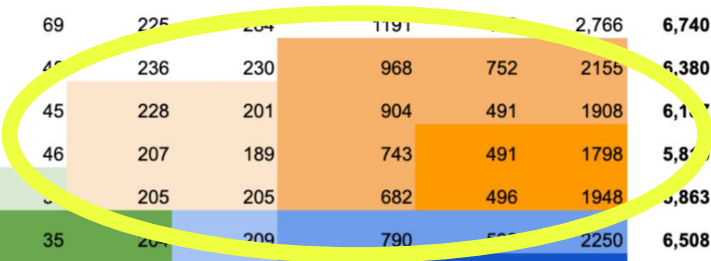
TO Tier 1	
TO Tier 2	
TO Tier 3	
Total TO	

This is our TURNOUT universe. Likely to vote for your candidate IF they show up to the polls.

Population	138,323
Turnout %	69.24%
Turnout	95,772
Win number	49,801
Vote Deficit	21,899
Vote Deficit at 70x70	12,308

Dem deficit: 13,474
Rep deficit: 3,883

NC SD - 024		2020 Turnout										Total People
		0 to 9.99	10 to 19.99	20 to 29.99	30 to 39.99	40 to 49.99	50 to 59.99	60 to 69.99	70 to 79.99	80 to 89.99	90+	
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	20 to 29.99	261	1,319	123	4	69	225	204	1,191	1,191	2,766	6,740
	30 to 39.99	300	1,569	121	1	45	236	230	968	752	2,155	6,380
	40 to 49.99	315	1,939	156	0	45	228	201	904	491	1,908	6,107
	50 to 59.99	281	1,854	201	0	46	207	189	743	491	1,798	5,811
	60 to 69.99	303	1,778	213	0	35	205	205	682	496	1,948	5,863
	70 to 79.99	323	1,888	277	0	35	205	209	790	500	2,250	6,508
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	90 to 100	757	4,613	523	1	137	740	966	4,525	3,570	20,186	36,018
Total People		4,101	22,878	2,444	10	716	3,345	4,137	17,921	11,473	66,043	138,323



Dem Base 27,000

Turnout Projection 95772

This is our PERSUASION universe. These voters are likely to show up to vote, but many might be undecided as to which candidate they'll support.

Population
Turnout %
Turnout
Win number
Vote Deficit
Vote Deficit a

TO Tier 1 1,570
TO Tier 2 9,899
TO Tier 3 4,815
Total TO 16,284

Persuasion T1 4,733
Persuasion T2 8,603
Persuasion T3 1,235
Total Persuasion 14,571

Candidate Conversion

65.00%	3,076	Scenario 1 TO deficit:	13,474
55.00%	4,732	Scenario 2 TO deficit:	3,883
50.00%	618		
	8,426		

Resources to find data as you calculate your win number and hone your voter contact plan

- NCSBE: <https://er.ncsbe.gov/> - can help you calculate a win number by looking at past election results
- Votebuilder: Committee created through your state's Democratic Party. Access is not free, and price can vary based on size of your campaign. (It is absolutely worth the cost to have this resource early in the campaign)

Your new best frenemy - Votebuilder

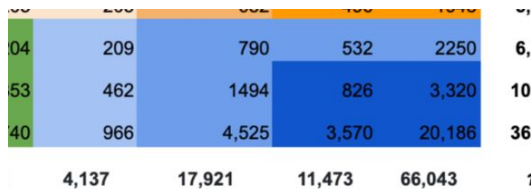
- The best way to learn Votebuilder is by using it.
- Trainings are often offered by progressive orgs, and you can ask your network for help!
 - <https://act.ngpvan.com/votebuilder>
- (Early) trial and error! Pull practice lists, write practice scripts, create practice survey questions, draw practice turfs, run practice VPBs, print practice lists to make sure your formatting works
- You, your campaign team, and all of your volunteers will use Votebuilder to some degree

The screenshot displays the DNC Votebuilder North Carolina interface. The top navigation bar includes 'DNC VOTEBUILDER North Carolina' and 'My Voters My Campaign'. A search bar is located below the navigation. The left sidebar contains a 'HOME' section with 'Home', 'Main Menu', and 'Voter Contact'. Below this are 'PEOPLE' options like 'Create a List', 'My Folders', 'My List ID Profiles', and 'Quick Look Up'. The 'DATA ENTRY' section includes 'Bulk Upload Wizard', 'Form View', 'Grid View', 'Quick Mark', 'Scan Bar Codes', and 'Script View'. The 'ORGANIZATION' section lists 'Canvass Results', 'MINIVAN Campaigns', 'MINIVAN Content', 'MINIVAN Formats', 'My Turfs', 'Virtual Phone Bank', and 'Virtual Phone Bank List'. The 'REPORTING' section has 'Counts and Crosstabs' and 'Report Manager'. The 'HELP & SUPPORT' section includes 'Send Product Feedback' and 'Submit a Support Request'. The 'ADMIN' section lists 'Active Codes', 'Most Frequent Users', 'Scripts', 'Source Codes', 'Tags', and 'Users'. The main content area is titled 'Welcome Virginia' and features a 'MAIN MENU' with 'Output Requests' (1 New), 'My Requests', 'My Export Files', 'My PDF Files', 'Counts/Crosstabs Outputs', 'Follow Ups', 'Support Requests', and 'Contact the Admin'. Below this is an 'Administrative Menu' with 'Pelling Locations', 'Reports - Forms - Labels', 'MINIVAN', 'Experts', 'Letters', 'Phone Services', 'Users', 'Codes - Questions - Scripts', 'Campaigns and Content', 'Integrations', and 'Advanced'. The 'Quick Look Up' panel has a 'Quick Look Up' button. The 'Lists' panel has 'Create A New List', 'Go To My List (0 People)', and 'View My Folders'. The 'Canvassing' panel has 'Canvass Results', 'Turfs', and 'View Map Region Refresh Queue'. The 'Get Out The Vote' panel has 'Get Out The Vote'. The 'Reporting & Data Analysis' panel has 'Analytics Dashboards' and 'Report Manager'. The footer shows '© 2021 NPV VAN - Privacy Policy'.

So I've got my win number and my target universes - now what?

- How many voters do you have to contact and how many days are there until E-day?
- Start off easy. Divide your win # by the number of days you have until Election Day.
 - Maybe you're starting exactly one year from Election Day and your win number is 50k - that means contacting about 137 voters per day.
- How many volunteers/volunteer hours do you need to achieve 100% universe contact?
- What is your district like? Suburban neighborhoods? A city with a lot of apartment buildings? Gated communities? Somewhere rural with a lot of farmland and houses miles apart with long driveways?
 - Questions like this will determine how much can be practically achieved in one volunteer shift.

Volunteer recruitment & retention



Remember this section from our universe overlay earlier? There's a good chance you'll find some additions to your campaign team here.

- This is described as your "base" universe - which means they are extremely likely to vote for your candidate even if your campaign never makes direct contact with them.
- Re-shifting
- Volunteer coordinator(s)/leads
- "Super volunteers"
- ~~All work and no play~~

You've got your volunteers and your field plan - how do you talk to voters? (literally)

- Assess the experience and comfort levels of your volunteers
- Don't send your volunteers to voters unprepared
 - Rehearse your training with a friend, family member, or kitchen cabinet member
 - Before a canvass/phonebank launch, let your volunteers rehearse with one another

Components of a good script

- Conversation guide, not verbatim speech
- Stump statement/why you're reaching out
- Answers to FAQ about candidate/election
- Survey questions
- Making a plan to vote/vol ask/vote tripling ask

TECHNOLOGY: Pros and Cons

Launching a phonebank

- How many volunteers are confirmed?
 - Is everyone dialing from their own home or gathering in the same location?
- Are you using paper lists or a Votebuilder Virtual Phonebank?
 - Virtual: does everyone have a laptop? An ActionID? OpenVPB can save you some headache.
- Will your volunteers be willing to use their own phones to dial?
 - Do your volunteer's phones have a local area code?
- Optimal dialing time is from 5ish to 7:30*
- Do you leave a message?

Consider the **technology** abilities your volunteers have. If you have the resources to buy burner phones/set up multiple Google Voice numbers or procure cheap laptops (Chromebooks work!) - how much time will it take to make your volunteers comfortable navigating the tech before they can start dialing?

- Screenshots are your friend!

Launching a canvass

Day(s) before: make your “confirm calls”

- Are you familiar with the turf? Consider driving/walking some of it yourself before sending volunteers - make sure it's safe and walkable and not gated communities or otherwise inaccessible

Launch location checklist: somewhere in/near your canvassing area with safe and accessible parking, a restroom if possible, wifi, ability to charge devices

Your volunteers need to bring: appropriate footwear/weather gear, a positive attitude

You need to have for your volunteers: candidate literature, your phone #, their turf, clipboards/rubber bands/bags

Build in time to teach MiniVAN. Set expectations. Practice first! Safety first!

Phone calls and door knocking are the most efficient, effective and common modes of direct voter contact.

Know your volunteers' strengths - there's something for everyone on a campaign.

Field

with Shanetta Burris - Durham Community Organizer

Saturday, November 20 1-3pm

Rural/Urban/Suburban field
Managing volunteers

Field Plans

**Know your Turf:
Organizing in Rural,
Suburban & Urban
areas**

Step One: Build your Base

- Base building is one of the few campaign elements that leaves an impact beyond Election Day.
- Base building can help lay the ground for the next election, give your candidate or group new credibility and currency in your community, and help raise the candidate profile or issue in meaningful way.

Base Communities

- Who makes up your base community?
- Why is it important to focus and earn support from base communities?
- Are you in relationship with communities and their leaders?
- **You do not claim your base, your base claims you!!**

Base Building Strategy

- Who are your allies?
 - Where do you already have established relationships?
 - Who are the people who turn out on a regular basis.
 - Who are the people who share our values?
- Who are the key players?
 - The key players in a community can help us find the supporters we need.
 - Assists in identifying who needs to be engaged.
 - This practice may assist in determining your opponents core constituencies.

Rural Organizing

- Canvassing challenges
 - Distance between doors
 - Limited walkability (no sidewalks or street lights)
 - Outside dogs
 - Un-numbered houses
- Faith communities
- Organic organizing structures
- Messaging
- Technology
 - Your phone may not work
 - Limited broadband and wifi
 - Enable Wi-Fi calling

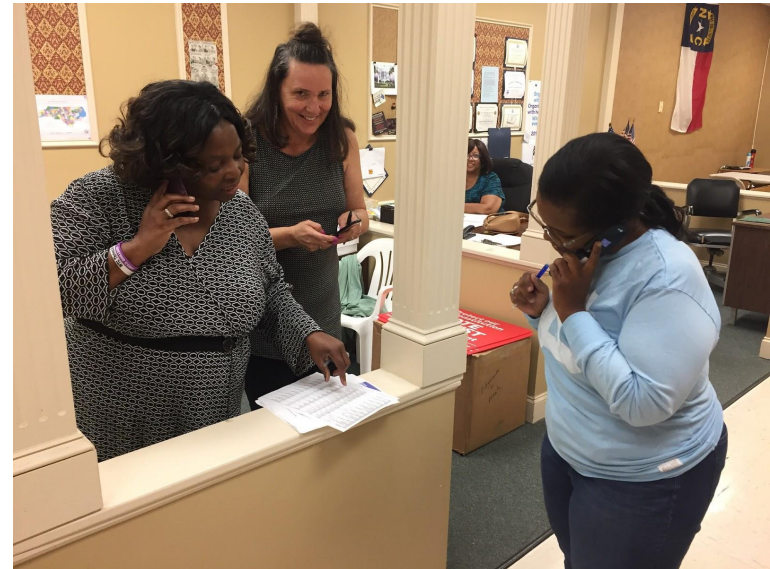
Suburban and Urban Organizing

- Canvassing Pros
 - Increased door density
 - Increased walkability
- Canvassing Cons
 - No solicitation communities
- Influence of College/University Population
- Organic organizing structures
- Messaging
- Technology

Best Practices for Base Building

- Figure out who the real leaders in the community are.
- Identify the mutual benefit.
- Ask for help and money.
- Find surrogates.

Managing Volunteers



Volunteer Recruitment

- Make volunteering social and fun!
 - Virtual vs In-Person Opportunities
- Make volunteers feel valued
- Leverage and build relationships
- Add a personal touch to recruitment efforts
- Avoid transactional incentives
- More communication isn't always better
- Ensure volunteers are comfortable and well equipped for their role.



Volunteer Engagement and Retention

- Impact of COVID-19
 - Volunteer safety
 - Reluctant to participate in in-person events
- Balancing Communication
 - Suggest designated person or team to manage volunteer relationships.
 - Templates and calendars are YOUR friend!
- Personal contact works
 - Personally contacting volunteers is effective at recruiting volunteers to attend events and confirming attendance at events volunteers have RSVP'd to attend.
- Reducing the flake rate
- Facilitating Volunteer relationships
- Inclusive and welcoming volunteer engagement

Volunteer Preparation by Tactic

Tactic:	Preparation:
<ul style="list-style-type: none">● Phonebanking	<ul style="list-style-type: none">● Tool and Script Review● Review of talking points● Review of volunteer expectations● Practice!
<ul style="list-style-type: none">● Canvass/Literature Drop	<ul style="list-style-type: none">● Logistics (meeting location, start/end time, designated geography)● Attire (walking shoes, campaign gear, etc)● Review of literature and key talking points● Tool familiarity
<ul style="list-style-type: none">● Poll Worker	<ul style="list-style-type: none">● Review of literature● Review of all polling location rules and regulations● Clearly articulate campaign expectations

Making a Field Plan

Field Plan Toplines:

- A strong field plan is key for victory!
- Proper planning is essential but be prepared to pivot.
- Consider the influence of other levels of the ballot and the impact on your outreach efforts.
- Consider limitations of scoring when targeting BIPOC communities.
- Key Components:
 - Budget
 - Tactic
 - Scale
 - Schedule

Budget

- Alignment with Candidate and Campaign Treasurer on field investment.
- Paid Staff vs Volunteers
 - Level of Accountability
 - Are you going to hire organizers?
 - Organizers can yield a 3-5% bump if they are able to meet metrics and goals.
 - Can you afford to pay staff a living wage?
- Considerations for COVID-19

Tactics: Key Considerations

- Electoral Cycle
- Universe Composition
 - Base Voters
 - Mobilization
 - Persuasion
- Budget

Tactics

Tactic	Pros:	Cons:
Canvassing	<ul style="list-style-type: none">• Most effective• Face to Face conversations• Ability to leave literature	<ul style="list-style-type: none">• Limited quality control• A lot of volunteer labor required.
Phone Calls	<ul style="list-style-type: none">• Second best tactic• Conversation driven	<ul style="list-style-type: none">• Low contact rate• Time intensive
Text Messaging	<ul style="list-style-type: none">• Popular among volunteers• Easy• Doesn't take a lot of time	<ul style="list-style-type: none">• Nominal impact
Relational Voter Program	<ul style="list-style-type: none">• Built on trust and existing networks.• Has the greatest ability to move people.	<ul style="list-style-type: none">• Not scalable• Lacks targeting

Scale (Metrics)

- How many people are in your universe?
- What tactics will you use for engagement?
- How do you plan to engage with these voters?
 - Candidate Education
 - Volunteering
- How many times will you engage these voters?
 - Universe Passes

Voter Contact Timeline

- Campaigns operate on two distinct timelines-and these are often in tension.
- Elections operate on a very short timeline with finite resources.
- During the campaign cycle, we are prioritizing and choosing where to invest those limited resources with the biggest payback in winning a vote.

Voter Contact Timeline

- Short Term (3-6 Months)
 - Can conduct voter registration and get-out-the-vote operations.
 - Harder to build sustainable relationships.
- Middle Term (6-12 Months)
 - Offers time to identify candidates and conduct base building in targeted base communities.
 - Operate within existing infrastructure
- Long Term (12+ Months)
 - Offers the ability to grow relationships, really work with communities – it starts with showing up and just listening.

Tips for Voter Contact Programs

- Focus on **contacts**, not attempts.
- **Plan ahead** to ensure scripts and mail fulfill your intentions, are free from errors, and are clear.
- **Share drafts** broadly, **pilot them** in the field, and **collect feedback** to modify them. If canvassers go “off script” **figure out why!**
- Conduct **regular trainings** and reinforce over time.
- **Use data** from canvassers to identify problems quickly.
- Incentivize **honesty**
- **Don't** try too many things at once.
- **Practice makes perfect!!**

Q&A

with Pia Nargundkar
Taylor Grady-Daly
Devon Roberts

We will try to answer as many questions as possible.

We will answer questions in the chat and/or verbally.

We will save the chat and upload the questions and answers into the Resource Center.

If questions are too specific we may suggest setting up a consultation with one of us.