Democratic Party of Oregon
Local Elections Project
Candidate Training
February 22, 2014
Marion Democratic Headquarters
250 Liberty Street SE
Salem, Oregon

Noon Introductions and Project Overview

12:30 pm Strategy and Campaign Plan – Part 1
- Your campaign frame and strategy
- Setting your vote goal
- Picking targets for voter contact
- Simple campaign plan and timeline

1:30 pm Your Message
- Why you're running
- Building contrasts with your opponent
- Voter contact script
- Role play
- Voter pamphlet
- Visibility
- General media

2:45 pm Voter Contact
- Getting voter file access
- Basic voter file skills and training
- Using the voter file for:
  - Phone banking
  - Door-to-door outreach
  - Get-out-the-vote

3:45 pm Fundraising
- One-to-one fundraising
- Role plays
- Events

4:50 pm Allies and Endorsements

5:00 pm Building Your Team
- Goals
- Recruiting volunteers
- Recruiting and building leaders

5:30 pm The Plan – Part 2

5:50 pm Evaluation and closing comments

Democratic Party of Oregon
2014 Primary/Local Election Calendar

DATE	DAYS BEFORE ELECTION	DEADLINE / EVENT
12-Sep	250	First day for candidates to file declaration of candidacy.
20-Jan	120	First day to electronically file using ORESTAR candidate statements and measure arguments for the state voters' pamphlet for primary election.
18-Feb	91	Last day before primary election for county clerk to cancel an elector based on information from U.S. Postal Service records.
22-Feb	87	*Local Candidate Training*
29-Mar - 30-Mar	79	*2014 1st Quarter SCC Meeting*
11-Mar	70	Last day for candidates to file declaration of candidacy, nominating petition or withdrawal of candidacy for primary election.
13-Mar	68	Last day for candidates to submit statements for county or state voters' pamphlet for primary election.
14-Mar	67	Last day for candidate, other than district candidate, to file withdrawal of candidacy for primary election.
20-Mar	61	Last day before primary election to inactivate voters for non-voting or failure to update.
8-Apr	42	Seven day campaign finance transaction reporting begins for primary election.
20-Apr	30	**Easter Sunday**
20-Apr	30	Last day before primary election for county clerk to establish official dropsite locations for ballot deposit.
25-Apr	101	*Morse Dinner*
29-Apr	21	Last day to register to vote or change party affiliation for primary election. Registration cards that are postmarked by this date or submitted online no later than 11:59PM are valid registrations for the primary election.
30-Apr	20	Last day to mail primary election state voters' pamphlet.
30-Apr	20	First day to mail ballots to electors, with or without daily mail service, for the primary election.
2-May	18	Last day to mail ballots to electors without daily mail service for the primary election.
6-May	14	Last day for mailing/distributing county voters' pamphlet for primary election.
6-May	14	Last day to mail ballots for primary election.
13-May	7	County clerk may begin scanning ballots for primary election in accordance with security plan approved by the Secretary of State.
13-May	7	Last day to conduct public certification test of vote tally system for primary election.
13-May	7	County clerk may begin opening return identification and secrecy envelopes for primary election.
15-May	5	Last day for requirement to mail absentee or replacement ballots for primary election.
20-May	Election Day	Primary/Local Election Day: Official dropsites open 8 hours or more and until 8PM for depositing cast ballots. County Clerk's office open 7AM - 8PM for issuing and depositing ballots.
20-May	Election Day	Seven day campaign finance transaction reporting ends for primary election.

DEMOCRATIC PARTY of OREGON

SIMPLE CAMPAIGN PLAN

Week	Phone Calls	Mail	Doors	Other	Fund Raising
6 Vote Goal 550 1100 Contacts	200 complete 10 hours / 5 Vol 200 running total		0	1500 Flyers $200	Need $1900 $200 calls
5	200 complete 10 hours / 5 Vol 400 running total		100 complete 20 hours / 5 Vols 100 running total		$300 calls $600 running total
4 Ballot Mailed	400 complete 20 hours / 10 Vol 800 running total	1100 Vote for Democrat! $600		200 Yard signs $400	$300 calls $600 event $1500 running total
3	300 complete 15 hours / 8 Vol 1100 running total	1100 Democrat for Office! $600	200 complete 40 hours / 10 Vols 300 running total		$400 calls $1900 running total
2	400 complete 20 hours / 10 Vol 1500 running total		200 complete 40 hours / 10 Vols 500 running total		
1 Ballots must be returned	400 complete 20 hours / 10 Vol 1700 running total **48 Total Volunteers**	Total $ 1200	**25 Total Volunteers**	Total $ 600	

73 Total Volunteer Shifts

Planning Calendar Month:	Door-to-Door Team Leader: # Goals:	Phonebank Team Leader # Goals:	Fundraising Event Team Leader # Goals:	Yardsign Team Leader # Goals:	Endorsement/ Postcard Team Leader # Goals:

Effective Communications Programs

Determine Your Audience
- Then reach it with the voter file and targeted outreach

The Key to Success -
- Know ourselves…
…and our competition

How to reach our target audiences?
With a Good Communication Program

- **People talking to people**...most effective, but first -

A Good Brochure

…*Can help* – it can build volunteer's confidence and recipient's confidence
…*Or hurt* – if it's given out without talking to voters

It does not change minds - but may reinforce some ideas
To be effective it needs to be:

- Simple
- For target audience - not all things for all people
- Or general audience - all things for most people
- Big Fonts
- Pictures
- Good simple headlines
- Contact info, web

More Important –

People talking to People

You'll need people, a good script and simple training program

The Script:

- Local, short, compelling
- With an ask:
  - Pledge to vote
  - Vote
  - Volunteer
  - Donate

Drafting the Script
- Target audience is the focus
- Target message works for the audience
- Write it out…quickly
- Practice with a friend

  - Basic elements
  - Introduction
  - Who or what you're for - local, personal, simple
  - Your opponent - contrast
  - Urgency
  - What you'll do to win
  - The ask -
    - pledge to vote
    - volunteer
    - donate
  - The close – logistics and thank yous!

The Training Program:
Cover:
- Why you're doing this outreach
- The method – phone, door-to-door, event
- The Goal (the ask + numerical goal)
- Review the script
- Run roleplays
- Simple +/- feedback
- Go do the work with "coaches"
- Thank them, let them know the impact, sign them up again

The Challenging Conversation…

Learning the Pivot

Redirecting a challenging conversation to get to your goal
- *people to help you reach your goal*
- *or preserve the time to reach more receptive people*

Not a debate -

Pivot 101 - *Less judgment*
- Ok - have a nice day...

Preserves your time to reach out more receptive people

Pivot 201 - *More judgment*
They're on your side,
but need some refocus to move forward
and you need them

How it works -

- They state their concern
- You restate their concern simply and validate
- You state your larger goal and view
  - same issue wider view
  - bigger issue bigger view
- Your focus and goal -
- Ask if they can share your view and help work on your goals

Other Communications Programs

- Appoint people to lead each effort and report back

Voter Outreach

To drop-off, new voters, and constituency/demographic targets

- Call program (voter file)
- Door-to-door program (voter file)
- Events with targets

To general public –

- Events and parades
- Literature drops to heavy democrat turnout

Online programs

Email program

- Your own newspaper

You need a:

- List – always work to expand it
- Schedule
- Simple message, not just meetings – tie in support for candidates on the next ballot
- Use humor, but get a second opinion before you do

Letter-to-Editor Program

You need a:

- Message a week…or similar – tie in candidate messages
- Review process
- Target audiences - not argument
- Email to your list
- Give an award for best letters

Web Page *(see DPO handout)*

- Keep it interesting and current
- Supports, but does not replace person-to-person contact

Working With Press Inquires

Return calls in a timely manner
- you have the right to take time to think before you respond

Ask:
- To set a later time to talk
- For their deadline
- Cell phone and email
- Issue area for interview

Preparation
Think through:
- Who you're talking to and their story approach
- Value of response
- What's your best message options are – brainstorm

Get feedback on your best draft response from:
- Committee member
- Officeholders
- Issue specialist or allies
- State Party

You can respond by:
- Email with a statement
- Phone call with your talking points (and a friend if you want)
  - Off the record – not always
  - On "background" – not always

Review results and debrief afterwards
– think through next steps...if any

Brad Martin
Executive Director
Democratic Party of Oregon
Phone 503-239-8625
Brad@dpo.org
www.DPO.org

DEMOCRATIC PARTY of OREGON

VoteBuilder Quick Guides

- My Profile / Logging in for the First Time
- Quick Look Up
- Create a New List
- Add People
- Narrow People
- Remove People
- Saving Lists
- View My Folders
- Scripts
- Printing Lists
- Grid View Data Entry

My Profile

Logging in for the First Time

What is it?

In order to log into VAN, you must have a User account created for you. The process begins when you receive an email asking you to click on a link to set your password. Be aware that this link will expire after 48 hours. You may also be given a User Name and temporary password by the administrator of your account and you will be asked to create a new password. Some high level Users will also be required to enter a 4-digit PIN.

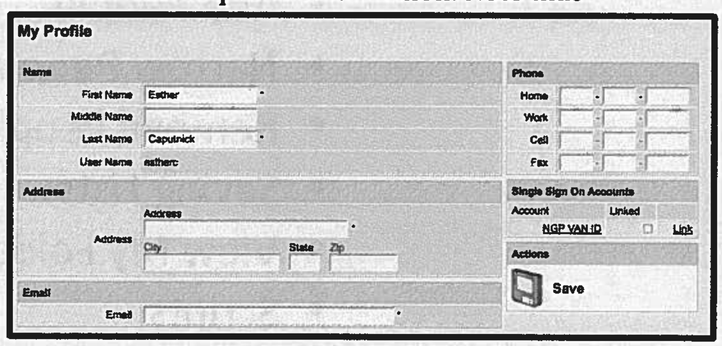
When to use it?

Whenever a new user account is established for you, you'll need to log into the system and input some basic information before you get up and running. Some sites also have what is known as an End User License Agreement (EULA) that stipulates proper use of the site and the data, and cites penalties for misuse. In such cases, you will be required to electronically sign the EULA before proceeding.

How to use it?

The first step is to create a password if you have been sent an email that contains a link to do so. Keep in mind that the ability to access this link expires after 48 hours. As explained in the interface, VAN passwords have strict security requirements. The passwords must be at least 7 characters long, include both letters and non-letters, be hard to guess (e.g. not "password"), and cannot include variations on your name.

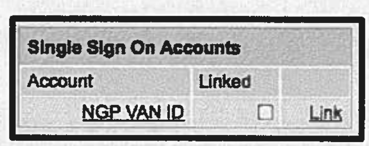
After you create and confirm your password, you will be brought to a profile screen that asks you to enter some basic contact information. Red asterisks indicate required information. Note that you do need to add at least one phone number. Fill in the necessary fields and then click 'Save.' You'll be prompted to sign into the system using your newly established password and user name.



Once you log in you will see the Main Menu page of your site. That page presents you with an array of options for searching and analyzing the information contained in the database. If there are any options you are expecting that you do not see, contact your site or account administrator with questions about your permissions. Please keep in mind that NGP VAN personnel do not make decisions regarding site access.

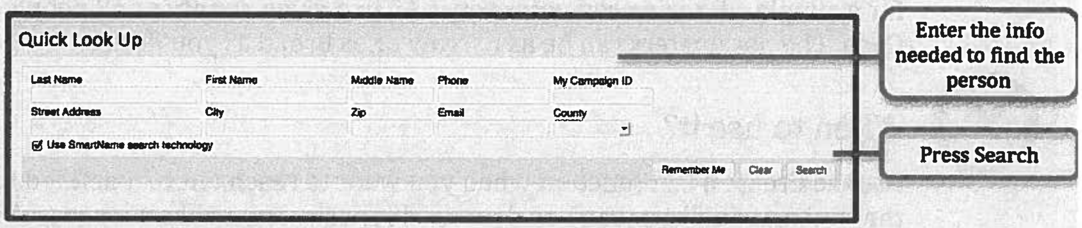
Expert Tip

Do you have both an NGP and a VAN account? If so, you can link those accounts which will allow you to log in to both of them through a single interface. To do that, click 'Link' under 'Single Sign On Accounts' and follow the instructions. When you're successful, the Linked check box will be filled in green.



What is it?

Quick Look Up is the easiest way to find a specific individual in the database. You can type in all or part of a first or last name, or any other information you have about the person into the fields shown in this image and press 'Search.' The database will return any names that match the data you've entered. For example, if you enter a name and a phone number, the search will return only records that contain <u>both</u> the name and phone number. Entering only the information that you know is correct will help you find the person you are looking for more quickly. If the 'Use SmartName Search Technology' box is checked, common first name variations will be returned. For example, 'Smith, Mary' may return 'Smith, Maria', 'Marie', etc.



When to use it?

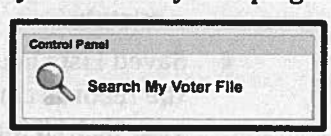
Use Quick Look Up when you want to find voter or volunteer records quickly or tag specific individuals with new information. For example, you may want to tag someone with an Activist Code or Survey Question response or perhaps you want to add or change information for volunteers who have signed-up for or attended your events.

How to use it?

You can enter information into one or more fields in the search window. Enter as little or as much information as you need to find the person. Within most fields, you can enter full or partial information (e.g. full name Jennifer or just first initial J). Entering more information helps narrow the search, but entering too much information may hinder your efforts if the information is incorrect or not contained in the database. By the same token, entering too little information, e.g., only the last name 'Smith,' can produce more results than is practical. Once your list of names is returned, you can click on your desired match to access that person's record, or you can modify and re-run the search to narrow or expand your list of names.

Expert Tips:

- For common names, enter unique identifiers like phone numbers and email addresses if possible. If not available, enter city name or other available information to help narrow the results.
- If you aren't sure how to spell a name or read someone's handwriting, enter just the information you know. For example, you can enter the first few letters of a person's last name with just a street name. Incorrect information may exclude the person you are seeking from your search.
- If you are searching My Campaign but can't find a match, the person may not yet have a My Campaign record. Click the 'Search My Voter File' button to search that database. From there you can import the person into My Campaign, or add the person to My Campaign if a voter file record does not exist.



What is it?

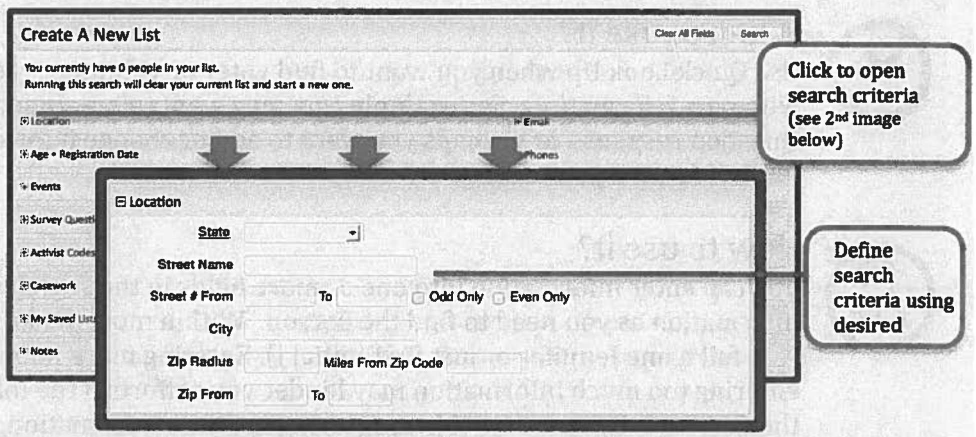
The Create a List function allows you to search for groups of individuals that meet a given set of criteria. You define the criteria to meet your current needs. Once you click Create a List from the Main Menu, you'll enter a search interface that allows you to define the parameters of the list you want to generate – for example, all registered voters over 40 in a given county or all people tagged with a certain Activist Code. The parameters can be as narrow or as broad as you desire.

When to use it?

Use the Create a List function when you want to reach out to a defined list of individuals. This could be in the context of a phonebank or door-to-door canvass, a volunteer recruitment campaign, a Blast Email, a donor outreach effort, a mass mailing, or for any other programmatic purpose. In some cases, your organization may have already defined your targets for you and you simply need to limit the list to your geographical turf, for example, or to people not contacted recently.

How to use it?

Simply click the '+' signs at the left of each category to open the search fields for that category. Fill in the fields you want to use to define your search. For example, in the location category, you can define your search using counties, media markets, congressional districts, ZIP codes, or any combination of these.



Once you run your search you can refine it using the Add, Remove, and Narrow icons located at the top of the page. This allows you to build a list step by step or to build upon existing saved lists or searches.

Once you've completed your list you can save it, print it or share it with other users. You can also apply a host of more advanced functions located in the menu at the top of the list. See the NGP VAN Wiki or the How-To documents specific to those features.

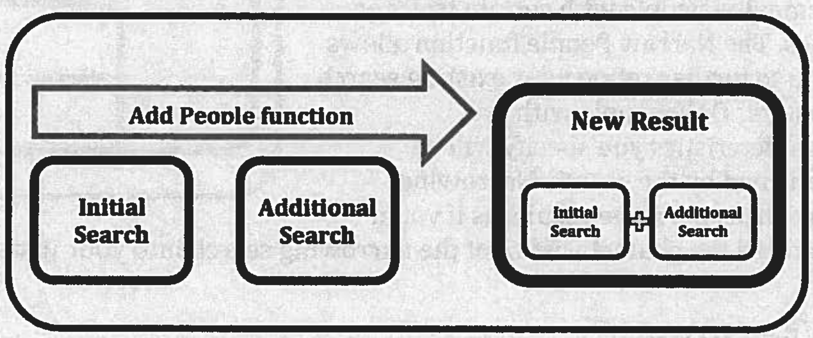
Expert Tips:

- Save your list periodically as you continue to refine it so that you don't have to start over if you make a mistake.
- Saved Lists loaded as My List are static. Saved Searches will process each time you load them so that the records contained therein may change on a periodic basis when you load the list. For example, if your Search includes Early Voting History, the composition of your list will change as this data is applied.

Add People

What is it?

Once you've created a list you may want to refine your search by adding or removing people with certain traits or tags. The Add People function allows you to add people to an existing search, whether it be a saved search or a search you ran just moments ago. In essence, the Add People function runs a new search of the entire database and then merges the results with the pre-existing search steps. You can keep adding more people by running the Add People function multiple times.



When to use it?

Use Add People in one of several situations, including:

- Your list cannot be created with just one search step. For example, if you want to find a voter who voted in at least 2 of 4 general elections and 2 of 4 primary elections, you would need to create an Add People step for the primary elections.
- You realize you forgot to add an element to your initial search. Note that when creating the new Add step, you will also want to include the original relevant criteria in your initial search step. For instance, if you searched on County 'Middlesex' and City 'Somerville' and then want to add voting history, unless you select the same districts, you will be searching voting history for the entire database.
- You want to modify an old search but don't want to rebuild the search from scratch.

How to use it?

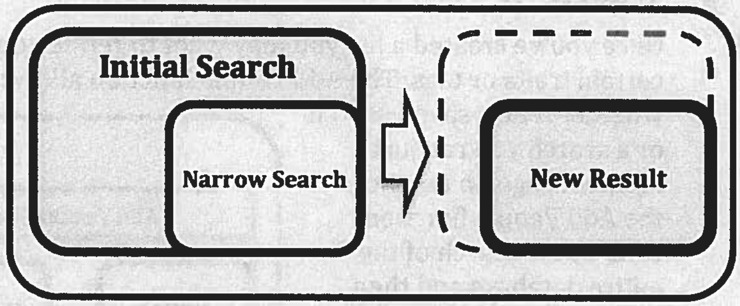
Using this function is simple. Load your existing Search or List then click the Add People icon at the top of the page. Define your search according to the people you want to add, and press 'Search.' You can then save the resulting list or refine it further by adding more people.

Expert Tips:

- If your Add People step presented undesirable results, you can use the Restore function to restore the previous version of the list and try again. Restore is available for newly created lists of less than 500,000 records.

Narrow People

What is it?



Once you've created a list you may want to refine your search by adding or removing people with certain traits or tags. The Narrow People function allows you to further refine your existing search results. Only people with the characteristics you specify will be returned by the search. Narrowing produces the same results as if you'd entered the characteristics of the narrowing search into your initial search.

When to use it?

Use Narrow People in one of several situations, including:

- Your initial search captured too many records for your intended purpose.
- You want to contact only a subset of an existing search – for example, just people tagged with a certain Activist Code or Survey Question response, or just people who live in a certain geographical area.
- You want to divide an existing search into several smaller searches – for example, by geographic area, by constituency type, or by age – so that different people can conduct specialized outreach to different parts of the initial search list.

How to use it?

Using this function is simple. Load your existing search or list then click the Narrow People icon at the top of the page. Define your search according to the people you want to keep on your list, and press 'Search.' You can then save the resulting list or refine it further by narrowing using other criteria.

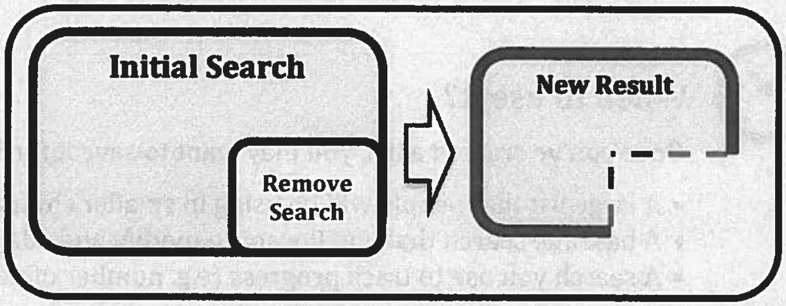
Expert Tips:

- Narrowing a list to only people with confirmed phone numbers is essential when using any of the Phone Services tools such as Virtual Phone Bank or Predictive Dialer.
- Think carefully about the difference between Remove and Narrow. For example, if you want to call only women, removing men will leave everyone who has <u>not</u> been tagged as a man which may leave some men on the list because their sex is not designated in the database. Narrowing to women assures only women are on the list, but may remove some women whose sex also isn't in the database. Which function you use depends on which records you are satisfied with remaining in your list.

Remove People

What is it?

Once you've created a list you may want to refine your search by adding or removing people with certain traits or tags. The Remove People function allows you to further refine your existing search results. Only people with the characteristics you specify will be removed from the list.



When to use it?

Use Remove People in one of several situations, including:

- Your initial search captured too many names for your intended purpose.
- You want to weed certain types of people out of an existing search – for example, people who have been contacted recently, people who asked to be removed from a contact list, or records that have been tagged with a specific Activist Code.
- You want to contact a subset of an existing search – for example, women or people of a certain age range.

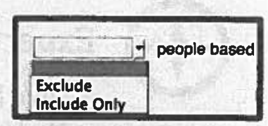
How to use it?

Using this function is simple. Load your existing search or list then click the Remove People icon at the top of the page. Define your search according to the people you want to remove from your list, and press 'Search.' You can then save the resulting list or refine it further by removing more people.

Expert Tips:

- Think carefully about the difference between Remove and Narrow. For example, if you want to call only women, removing men will leave everyone who has not been tagged as a man which may leave some men on the list because their sex is not designated in the database. Narrowing to women assures only women are on the list, but may remove some women whose sex also isn't in the database. Which function you use depends on which records you are satisfied with remaining in your list.

- Logic plays a key role in list refinement. If you want to remove people contacted in the past week, you click Remove People and then define the search to *include* those people because you are defining the people you want to remove.



- If your Add People step presented undesirable results, you can use the Restore function to restore the previous version of the list and try again. Restore is available for newly created lists of less than 500,000 records.

What is it?

The Save My List function allows you to save a search or search results in a folder so that you can access or modify them in the future without having to rebuild your search steps from scratch.

When to use it?

Once you've created a list, you may want to save it for future use. Examples are:

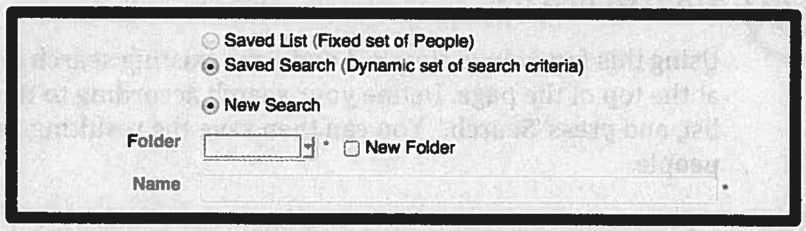
- A large list that people will be using in smaller chunks over a long period of time.
- A baseline search that you'll want to modify and adapt for different purposes.
- A search you use to track progress (e.g. number of people contacted) by your organization.

How to use it?

To save your list, click 'Save As' from the top of the My List page and a series of options will appear. First, decide whether to save your list as fixed or dynamic. The difference is simple:

- Saving as a fixed list saves the current set of people in your My List.
- Saving as a dynamic search means every time you open the search, it re-runs the set of search criteria you have saved, capturing any changes or updates that have occurred since the last time the search was run. For example, if your Saved Search excludes people contacted in the last week, the Saved Search results would change each time a new contact is recorded for a person.

Once you've decided which option best suits your situation, name your list or search, and save it in a folder. You can save it as a new list or search, or replace a previously saved list or search.



You can also save it in a new folder, or into an existing folder. To create a new folder, check the 'New Folder' option, then name your Folder and name your list and click Save. For an existing folder, choose the desired folder from the drop down menu, then name the list, and click Save.

Once you've saved a list or search, you can find it anytime by going to My Folders, choosing the correct folder, and clicking on your list. See the printing lists video and the sharing folders video for information on how to print or share your lists with others.

Expert Tips:

- Save My List as a search when you want to update your list each time you load it from My Folders. Save My List as a list when the contents will remain static. Also, saved lists can be used as search criteria when creating a list, to remove, add, or narrow My List by the records in the Saved List.
- To share lists and searches with members of your organization, save them to a folder and then give them access to that folder.
- Be aware that updates to your vote file can affect the content of your saved lists and searches. For example, if a voter is removed from the database, he will be removed from your saved lists/searches.

What is it?

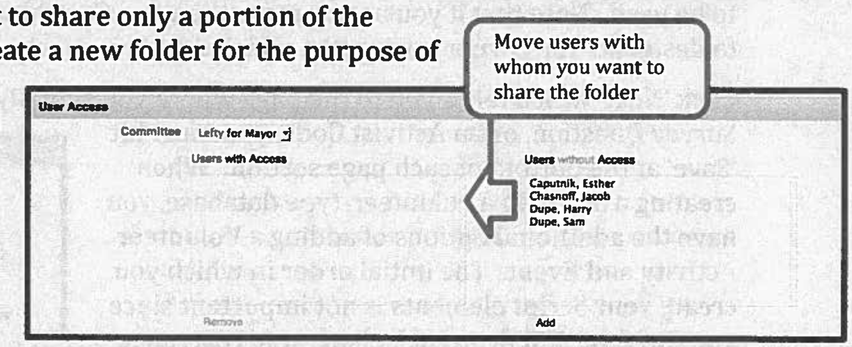
You can save both Lists and Searches to Folders to help you organize your documents. You can create multiple folders based on districts, turfs, voting behavior, and other criteria. You can share your folders with others in your organization and allow others to save their lists and searches into your folders.

When to use it?

Use Folders when you want to save a List or Search for future use, or you want to share one or more Lists with other members of your organization.

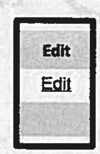
How to use it?

To create a new folder, click 'View My Folders' and a list of your existing folders will appear. To add a new folder, click 'Add New Folder,' type the name of your new folder, and indicate whether you want other users with whom you have shared your folders to be able to save Lists and Searches into it. With the proper security permissions, the next page allows you to determine who will have access to the folder. Keep in mind that users will have access to all of the lists in the folder so if you want to share only a portion of the lists/searches resident in a folder, create a new folder for the purpose of sharing those lists. Your folder will now appear in your list of folders and in the list of any users with whom you shared the folder. To share an existing folder, click on the folder name and then click 'Edit Folder.' Note that you may also share folders with User Groups.

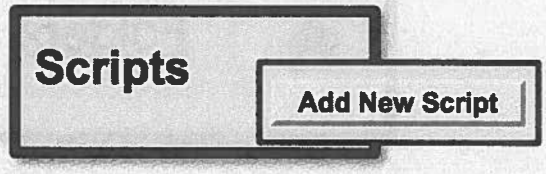


Expert Tips:

- You can create User Groups (e.g. staff or senior staff or New York staff) and then share designated folders with those User Groups. This allows you to share a folder with an entire segment of your team without having to share them one by one.
- You can give access to a folder to more than one user by holding down the control (PC) or command (Mac) key to select multiple users.
- Each list you save can appear in multiple folders. When you create and save a list, click 'Edit' next to the desired list from within a folder. The interface that appears allows you to designate the additional folders in which you want the list to appear.
- Clicking the 'Edit' link next to a Saved Search will also allow you to edit the current steps as well as add one or more steps to the search.



- Saved Lists to which you have access will show up on Create a List in the 'My Saved Lists' page section so that you can Add, Remove, or Narrow on your Saved Lists.



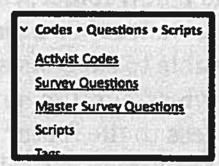
What is it?

A Script specifies the information that your canvassers will collect on the people they contact. You can apply a combination of text, Survey Questions, Activist Codes and Events to a Script. A Script can either be printed or appear electronically on your computer screen or minVAN device.

When to use it?

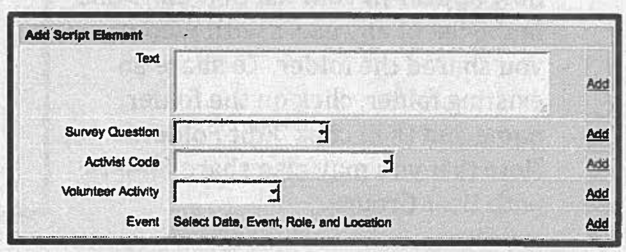
Create a new Script when you launch a new program or initiative that requires a new set of questions to be asked of people you are contacting. For example, you may want to ask people whether they support your candidate or cause, what [which?] issues matter to them, and whether they want to volunteer for your organization. You may place these information-gathering options together on one script.

How to use it?



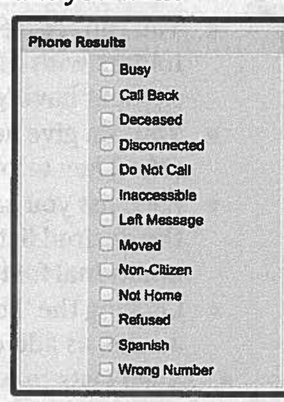
Click on 'Codes • Questions • Scripts' on the left-hand side of the Main Menu and then 'Scripts.' On the list page click 'Add New Script,' name your Script, optionally give it a description and designate in which database it is to be used. Note that if you are on more than one Committee, you are able to designate the Owner Committee which determines who may edit the script.

Click 'Next' which takes you to the page where you actually build your Script. As you add text, a Survey Question, or an Activist Code, you must hit 'Save' at the bottom of each page section. When creating a Script in a volunteer-type database, you have the additional options of adding a Volunteer Activity and Event. The initial order in which you create your Script elements is not important since you can drag and drop each element to rearrange the order.



There are two or more methods by which your organization will gather data, the most common being by phone or face-to-face contact. On the right side of the page are the Results you want available to canvassers when they are unable to reach the target person.

In some instances, your Script will be used for both calling and walking campaigns, in which case you can select both types of Canvass Results. Upon completion, save the Script.

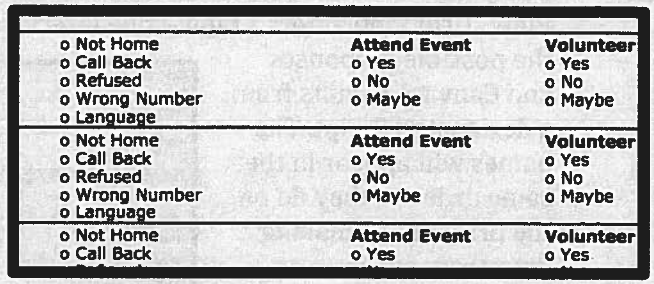


Expert Tips:

- Only Users on the Owner Committee can edit a Script. Other Committees, however, may be given access to use the Script.
- Keep your Scripts as simple and clean as possible. Expecting canvassers to read introductory text that is any more than a few lines is risking a 'canned' sounding presentation that is tiresome to recipients.

What is it?

The Print feature is used when paper-based lists are desired for phone banking, canvassing, event sign-ups, and other purposes. For example, if you are having a phone bank and no computers are available to callers, by choosing the applicable Script and Report Format, you can generate a printed list that provides a clear way for your staff or volunteers to contact your targets, ask the desired questions, and record key information for later data entry.

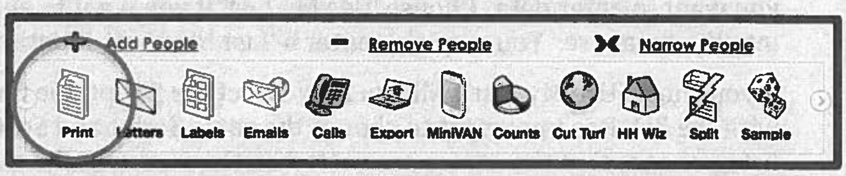


When to use it?

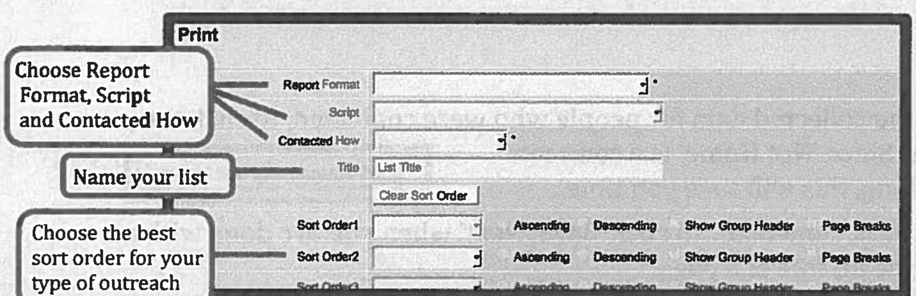
Use this function whenever you want hardcopy lists for people in your organization to use as part of their outreach efforts. Results are recorded on the lists and other volunteers can enter the data into VAN using the many data input tools available to users.

How to use it?

To print, open your list and click 'Print' from the menu at the top of the My List page. A new menu with a series of drop downs and radio buttons will appear. It looks complicated, but once you familiarize yourself with the available options, you'll be a pro. First, name your list so that you're able to easily identify it in the PDF Print Jobs list. Choose the appropriate Report Format and Script (optional). If you are unaware of which Report Format or Script to use, ask someone in your organization who is familiar with these tools.



There are built-in sort orders depending on which of the 'Contacted How' options you select. For 'Phone,' the default sort order is Phone Number, which can facilitate callers asking to speak to more than one person in the household. For Contacted How of 'Walk,' the default sort order lists addresses in the same order you would find them on the street in the real world. In addition to the ability to edit the sort order, Report Formats allow you to 'Set Print Defaults' that will populate the Print details page upon selection. See the PDF on Report Formats for further information.

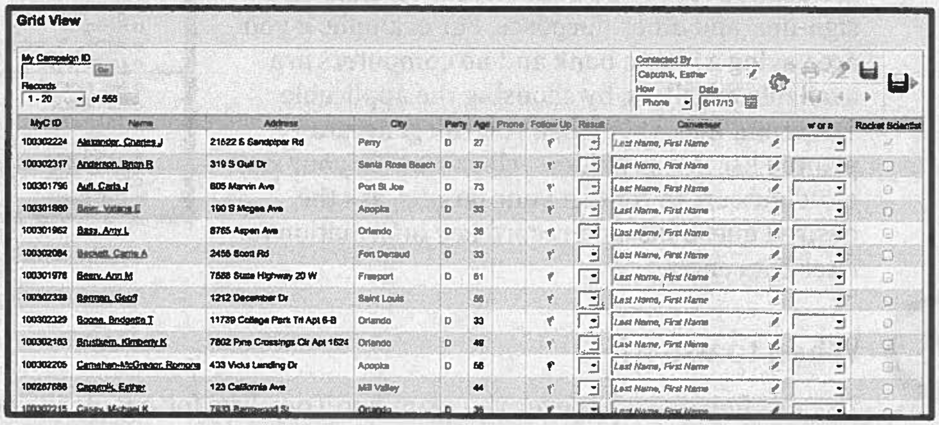


When you're ready to print, click 'Next' and your list will automatically be turned into a PDF. Click 'My PDF Files' in the upper-left corner of the Main Menu and look for the list name. Click 'Download File,' and you can print the list as you would any other document.

Grid View

What is it?

One of the most common ways to enter data from a phone bank or canvassing event is via Grid View. Grid View offers a table-style interface where people from a selected list appear along with the possible responses and Canvass Results from a designated Script. The names will appear in the same order as they do on the printed list, making data entry easy.



When to use it?

Use the Grid View interface to enter data from a phone bank, door-to-door canvass, or any other event that generates data on printed lists. The interface can be used by anyone with both the proper permission levels and a live Internet connection. The person entering the data need not, and often will not, be the same person who collected it.

How to use it?

Click on Grid View from the Main Menu, and you'll see a screen allowing you to call up the list for which you want to enter data. Choose 'Use My List' if you want to enter data for the current list you have loaded into the database. You may also enter a 'List Number', 'Continue my work' or 'Choose Quick Look Up.'

If you chose 'Use My List' will you now select the Script, the Contact Type and the Sort Order associated with the list. It is important to choose the same Script and Sort Order that were used when printing the list to ensure that the names are sorted on the screen in the same order as the printed list. Selecting 'Let me enter a List Number' will auto-populate the Print page fields and 'Continue my work' takes you directly to your Grid View and the page you were working on when you left it.

Once you are in Grid View, you can enter a Canvas Result such as 'Not Home,' or Activist Codes, responses to Survey Questions or schedule Events. Note that once you enter a Canvass Result, you cannot enter a response to a Survey Question and vice versa. They are mutually exclusive, e.g., a voter cannot be both 'Not Home' and have responded to your Survey Question. You have the option to 'Save,' or 'Save/Next' in the upper-right corner of the page. Both will save the data you have entered, but 'Save/Next' will take you to the next page of names.

Expert Tips:

- You have the option, after entering the collected data for people who were contacted, to click the 'Mark Remaining Not Home' button. Since 'Not Home' is a common result of canvassing and phone banking, this will save you time.

Mark Remaining Not Home

- To ensure your data is entered into VAN, remember to click 'Save/Next' when you are done with a page, or 'Save' if you are pausing in the middle of a page.
- You can also access Grid View from My List, by clicking on the 'Grid' icon at the top of the page.

Online Training Summary

The Democratic Party of Oregon offers regular online trainings to its candidates and volunteers so that they may be as prepared and knowledgeable as possible to work on Democratic campaigns in Oregon.

These trainings will be held entirely online - to participate you will need a PC *(Windows XP or newer)* or a Mac *(OS X 10.6 or newer)* with an internet connection.

Videos of all the trainings listed below can be viewed on the DPO's website at:
http://dpo.org/private/training-materials

To view existing trainings you will need to enter the following login credentials:

Username: democrat

Password: training

Candidate Trainings

Introduction to VoteBuilder
Are you new to running campaigns in Oregon? Do you keep hearing terms like VoteBuilder, Voter File and VAN but aren't really sure what they mean? In this training Don will explain the basics of the DPO's Voter File platform, VoteBuilder. You will learn what VoteBuilder is, why should be using VoteBuilder to manage your campaign, and how to gain access.

Pulling the Right List
In "Pulling the Right List" Don will walk you through using VoteBuilder to target the voters you need to reach in order to win. We will cover the ins and outs of using VoteBuilder's Create A New List tool to identify the voters your campaign needs to contact and to remove the voters that you shouldn't be contacting.

Making Calls
In "Making Calls" Don will walk you through using VoteBuilder to contact voters over the phone. We will cover how turn your voter contact universe into a phone list, how to print your call lists using VoteBuilder, and what voter contact best practices you should use when making calls.

Knocking Doors
Research has shown that face-to-face voter contact is the most effective way to convince voters to support your candidate and to convince them to vote in your election. In this training Don will teach you how to use VoteBuilder to manage your campaign's door-to-door voter contact. You will learn how to cut and print walking lists, as well as effective strategies for contacting voters at their doorsteps.

Entering Data
Is your office filling up with walk and call sheets that have not been entered into VoteBuilder? Have you accidently knocked on the same door twice because you couldn't remember who you had already talked to? In this training Don will walk you through entering data back into VoteBuilder. We will focus on Grid View data entry and how to use your data once you have entered it.

Virtual Phone Bank
In "Virtual Phone Bank" Don will demo VoteBuilder's Virtual Phone Bank tool. The Virtual Phone Bank tool allows campaigns to use computers to help make calls to voters and record call data in real time. We will cover setting up a Virtual Phone Bank and how to manage lists for a Virtual Phone Bank.

Get Out the Vote
Join Don has he covers using VoteBuilder for your Get Out the Vote (GOTV) effort. We will cover how to pull lists of voters who have returned a ballot to their County Elections Office as well as how to remove those voters for your lists. The training will also cover basic GOTV strategy.

Dollars for Democrats!

Why we ask?

-Funds to communicate with swing voters
-Funds to run get-out-the-vote efforts to mobilize our supporters
-Funds to tie in our strong supporters
-Funds to combat the dollars raised to support our opponent's campaign
-Funds to win - so we can pursue our goals and vision

***Other* people pay when we don't raise the funds to *win* . . .**

How to ask?

Challenge your assumptions –

- Moderate income Americans contribute -
  if you don't ask, the contribution will go to another campaign or group.
- People aren't offended by a "high" ask, they want to be partners in your campaign and are complimented by being asked.
- Don't decide for a donor – you aren't their parent or accountant, ask for the maximum contribution and let them decide.
- Once you've asked for a specific amount, be quiet.
  The pregnant pause is the most powerful phrase in fund raising.
- They'll give because they want you to win,
  they want you to fight for their causes and issues, and they know you've got a tough campaign ahead.
  . . .ask for a contribution that allows you to deliver on their investment.
- To build a winning budget,
  you have to ask everyone to contribute at an appropriate level.
- Finally, the most likely donor, is the donor who's already given,
  and the person who said no last time. . .
  is often the first to say yes when asked again..

Get Organized –

- Make a fund raising plan with:
  - Fund raising Goals, Timelines and Deadlines
  - How you're going to meet your goals – the fund raising mix:
    -Donor Calls
    -Fund raising events
    -Direct mail appeals
  - Build your beginning donor list (friends, family, plus. . .)
  - Write your "fund raising script" and practice, practice, practice.
  - Get going, schedule your call time, track your success,
    thank your donors, and ask again...
  - Review/adjust your goals regularly, and Win!

The Fundraising Script

-Write it out, practice often, and use it every time!

Fill in the blank basics:

Introduction:

Who you are and
What you're running for:
or who/what you're campaigning for:

Your Goals:

What you, your group or candidate
wants to accomplish when you win:

Your Opponent:

Briefly who your opponent is and
an issue that might motivate the donor:

How You'll Win:

Briefly what you're doing to win:
(doors, radio, lit drops. . .)

You're Raising Funds To:

Pay for radio, literature. . .

Ask:

This campaign is important,
That's why I'd like you
to contribute $________
Will you do that for me?
Be quiet!

If Yes:

Thank you!
Ask for credit card info, or to pick up the check,
or Lock in a date, double check the address,
and send a stamped envelope and note
Ask them to help in other ways!

If Maybe:

Negotiate the timing
or negotiate the amount

If No:

Soft No – ask to call back
Strong No – thanks & have a good day!

Call Sheet

Name: ______________________________ **Spouse:** ______________________________

Phones:
Home: ______________________________

Cell: ______________________________ Cell: ______________________________

Work: ______________________________ Work: ______________________________

Fax: ______________________________ Fax: ______________________________

E-mail: ______________________________ **E-mail:** ________________________

Best time & way to reach: **Best time & way to reach:**

Home Address:

Alternative Address:

Occupation:
Employer:
Background information:

Occupation:
Employer:
Background information:

Source/Referred By:
Donor History:

Donor History:

Attempt 1 - Dates called:

Ask: $__________ Date: **Pledged:** $__________ Date: **Paid:** $__________ Date:
Reason for Giving: Follow-up:

Attempt 2 – Dates called:

Ask: $__________ Date: **Pledged:** $__________ Date: **Paid:** $__________ Date:
Reason for Giving: Follow-up:

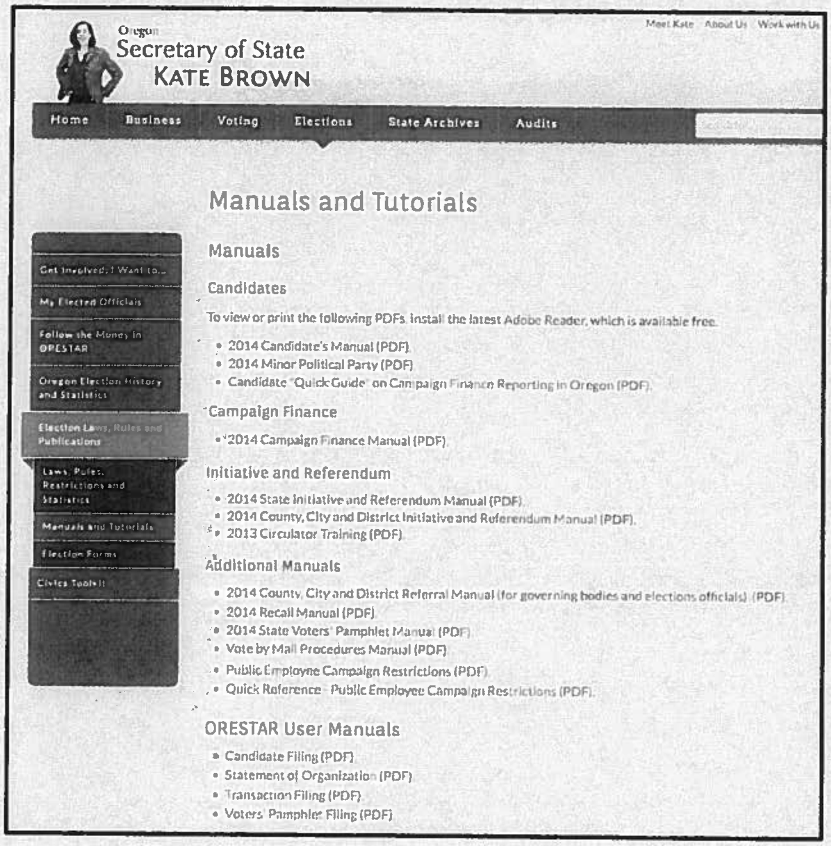
Attempt 3 – Dates called:

Ask: $__________ Date: **Pledged:** $__________ Date: **Paid:** $__________ Date:
Reason for Giving: Follow-up:

Other Manuals and Tutorials

A number or useful manuals and tutorials for candidates are available on the Secretary of State's website at:

http://sos.oregon.gov/elections/Pages/manuals-tutorials.aspx



Be sure to look for the following 3 manuals on the above page:

Candidates Manual:

http://sos.oregon.gov/elections/Documents/Candidates.pdf

Campaign Finance Manual:

http://sos.oregon.gov/elections/Documents/campaign-finance.pdf

State Voters' Pamphlet Manual:

http://sos.oregon.gov/elections/Documents/VPManual.pdf

Candidate "Quick Guide" on Campaign Finance Reporting in Oregon

Where and how do I start?

Congratulations on your decision to run for office! We hope this guide provides tips and answers to frequently asked questions by first-time candidates. More detailed information is available in the Campaign Finance Manual and the ORESTAR User's Manuals. The Campaign Finance Manual explains what information is disclosed when reporting campaign finance transactions. The ORESTAR User's Manual: Statement of Organization and Transaction Filing explain how to file a statement of organization and campaign finance transactions electronically using ORESTAR.

Who files disclosure reports?

If you	*Then*
Serve as your own treasurer and Do not have an existing candidate committee and Do not expect to spend or receive more than $750 during the entire calendar year (including personal funds)	Relax. No action is necessary.
Do not expect to receive a total of more than $3,500 or spend a total of more than $3,500 for the entire calendar year	File a Statement of Organization and establish a dedicated bank account – either by using ORESTAR or by submitting the paper forms Statement of Organization for Candidate Committee (SEL 220) and Campaign Account Information form (SEL 223) File a Certificate of Limited Contributions and Expenditures either by using ORESTAR or by submitting the paper form (PC 7) not later than seven days after first receiving a contribution or making an expenditure
Expect to spend or receive more than $3,500	File a Statement of Organization and establish a dedicated bank account – either by using ORESTAR or by submitting the paper forms Statement of Organization for Candidate Committee (SEL 220) and Campaign Account Information form (SEL 223) File campaign finance transactions using ORESTAR

What starts the whole process?

The decision to run for a public office, accepting contributions and making expenditures, whether from personal funds, campaign funds, or another person's funds.

Once I become a candidate, then what?

You must register your committee with the Secretary of State not later than 3 business days of first receiving a contribution or making an expenditure.

Keeping Books

The key to complying with campaign contribution and expenditure disclosure requirements is to keep detailed records and file your transactions on time.

Electronic Filing
Oregon Election law requires that campaign finance transactions be filed electronically. The Secretary of State's Office provides an electronic filing system, ORESTAR, free of charge. There is a terminal located in the Election's Division office for the public to use free of charge.

What if I don't own a computer?
A Statement of Organization (SEL 220), Campaign Account Information (SEL 223) and Certificate of Limited Contributions and Expenditures (PC 7) may be filed using the paper forms. If you are not eligible to file a Certificate, contribution and expenditure transactions must be reported electronically. You may want to check with your local library or other public facilities in your area to see if they provide a computer terminal for public use.

Must I have a dedicated campaign account?
Oregon law requires that you establish a dedicated campaign account if you expect to spend or receive more than $750 during the calendar year. The account must be established in a financial institution located in Oregon that ordinarily conducts business in Oregon. One important reminder—when establishing your campaign account, the name of the committee and the name of the account must be the same.

Are there limits on campaign contributions and expenditures?
Oregon does not have contribution and expenditure limits.

When do I report contribution and expenditures?
Generally, the deadline for filing a transaction is not later than 30 calendar days after the date of the transaction. For committees active in an election, beginning on the 42nd day before the date of the election and through the date of the election, a transaction is due not later than 7 calendar days after the date of the transaction. The campaign finance reporting requirements and additional transaction deadlines are available in the 2014 Campaign Finance Manual. Information on how to electronically file transactions is detailed in the ORESTAR User's Manual: Transaction Filing.

Are my campaign finance activities public record?
Yes, after the transactions are filed in ORESTAR they are immediately accessible by the public by accessing the ORESTAR Public Search link on the Elections Division home page.

May I serve as my own treasurer?
Yes, you may serve as your own treasurer. The Campaign Finance Manual provides committees with information on candidate/treasurer responsibilities.

How do I discontinue my committee?
In order to discontinue your committee, you must: File all transactions to achieve a zero balance and file a Statement to Organization discontinuing the committee

Where do I get copies of forms and instruction manuals?
All publications and forms are available online at www.oregonvotes.gov, or may be requested from the Elections Division at 503 986 1518.

Need additional help?
The Elections Division staff is available to answer any questions. You may:
email your questions to elections.sos@state.or.us
call us at (503) 986-1518 or at (866) ORE VOTES
visit our web site at www.oregonvotes.govrevised 11/22/2013

One-Minute Leadership Development

We always want to expand our base of new democratic leaders -- it's a crucial part of making the Democratic Party more effective. There are many approaches to leadership development, but by taking these three simple steps you can help you grow new leaders on the Democratic team:

1. Brainstorm the Roles, Responsibilities and Skills for Volunteer Leaders.

Example:

Role	Responsibilities	Skills
- Precinct Leader	- Make ongoing contact with 50-100 voters - Seven in Seven Program	- Dedicated Democrat - Willing to learn to canvass and make calls - Organized

2. Think about your Democratic Team and Potential Leaders - then make a Smart Ask!

- After every Democratic activity, take a few moments to think about the volunteers you just worked with, their strengths and weaknesses, and if any of them might make good leaders. Look at your list of needed volunteer leaders and see if there's a potential match. You might want to do this task with other members of your leadership team.

Example: Jane Smith

Strengths	Improvements
- Good speaker - Organized - Ran welcome program	- A bit shy - Never been to training

- If you've identified a potential leader think about how to approach them before you ask. Think about what responsibility you're asking them to take on, its time commitment, the support and training you can offer...then meet with them and ask.

Sample Script:

Jane you've done a great job running our welcome program
You're a good speaker and organized.

We'd like you to run our County Grassroots Outreach Program.

The job's duties are...
And it will take about... hours a week

You can help us win elections, because this position....

I'll help you work out a plan and goals, and Beth from the state party and I will help train you on the skills you'll need.

You'll really help Democrats by taking this job, are you willing?

3. Follow Through – Train them, Support them, Coach them.

- Good leadership development is much like coaching an athlete. You see their talent, recruit them, give them training and advice, and then turn them loose... with support, feedback and more training after they return.

Developing Democratic Volunteers: Leadership Development

.

One way to develop good leaders is to use an apprenticeship model, i.e. a process which is highly individualized, focuses on closely supervised practice, proceeds gradually to more difficult tasks, and in which you act as a mentor.

1. **As a leader, make it a top priority to identify potential leaders, and invest time into helping them become good leaders.**

2. Brainstorm a list of leadership roles and positions that would help your group grow and be successful. Briefly write out the skills required for each position you identify.

3. Take time to think about the volunteers you work with, their skills and strengths, and the leadership roles they might take on if given training and support.

4. As you identify a potential leader, tell him/her you believe s/he has the potential to become a good leader, and ask her/him to commit to the additional responsibility leadership entails.

5. In conjunction with the volunteer, identify her/his strengths and weaknesses, the leadership abilities s/he needs to develop, and a plan for learning them.

6. Train leaders by making them practice particular skills, e.g. planning and running meetings, brainstorming, fundraising, etc.

7. Build into the training feed back and a supportive evaluation of her/his performance.

8. Involve her/him in the decisions you make as a leader.

9. Discuss the role of a leader. The subject is not controversial, and getting a better understanding of the distinction between good and bad leadership, and the impact it can have on a group, can be beneficial to the developing leader.

10. As you develop leaders, you must give them real power—sometimes your own. While this may be difficult, failure to do so renders leadership development pointless and can hurt the long-term success of your organization.

Volunteer Job Descriptions

Data Entry Coordinator – Time per week 1 – 4 hours	The Idaho Democrats work out of a web-based database called VAN. We are looking for a volunteer who will help coordinate data entry from data gathered at events, fairs, fundraisers, etc. This person could even be called upon to help with candidate's data entry during the election year. Skills – Basic computer knowledge and the ability coordinate with volunteers.
Web Assistant – Time per week 1 – 2 hours	Bonner County has a beautiful website that we want to keep updated with current information. We are looking for someone who would help our webmaster maintain and post information on our site. Skills – This person should have some basic knowledge of websites and be willing to learn what is necessary from our webmaster.
Voter Registration Coordinator – Time per week – varies 1 – 4 hours	We are looking for someone who can organize a group of volunteers once monthly and possibly more during an election year to organize Voter Registration Drives. This could be done and movie events at the Panida, Farmers Market, outside Wal-Mart, etc. Skills – Good organizational skills and the ability to coordinate and motivate your volunteers
Canvassers – Time per week 2 – 4 hours during the election year	Candidates need volunteers during the election year to help knock on people's doors and talk about their issues. There is just no way a candidate can do it all on their own. There is nothing better than personal contact for a candidate and even a volunteer is better than nothing. Skills – A basic understanding of the candidate you are volunteering their platform. Good walking shoes and a ready smile!
Phone Banks – Time per month 1 – 2 hours	Volunteers who are willing to make phone calls to voters. The calls could be for a specific candidate, a poll or remind them to go vote

GOTV Coordinator – "Get Out the Vote" Time – May and November only and 12 – 20 hours a week	This is our effort to get our voters to the polls. By the time the election arrives, candidates have identified thousands of voters who they feel will vote for them. Our job is to get those people to the polls. Skills – This person must have strong organizational skills. The ability to find volunteers and coordinate the information with the candidates and county chair. Create the schedules for poll watchers, phone callers, drivers and anything else that comes up.
Drivers – Time – on election day only 1 – 8 hours	We need people on election days available to transport voters to the polls Skills – valid driver's license and knowledge of the area.
Poll watcher's – Time – Election week only 2 – 8 hours	Poll watchers help us determine who has voted and who still needs to get to the polls. Poll watchers sit at the polls on election day and check off names of voters candidates have identified who they want to get to the polls. The poll watcher then brings the information back to headquarters for the GOTV Coordinator to work on. Skills – Good ears! You must be able to hear the poll workers call out the voter's name.
Meeting Attendee	Person(s) willing to attend County and City meetings and report the information back to the Central Committee, e.g. City Council, County Commissioners, Planning & Zoning, etc. Skills – the ability to listen, take notes and make a report
Activities/Event Committee – Time per month 1 – 8 hours	Volunteers who would be willing to help organize events or activities providing exposure for Democratic ideas and Candidates. Candidates need every opportunity to be visible during the election year. Events would range from small in-home gatherings to Democratic Fundraisers, fair booths and other such events. Skills – Ability to work as part of a team networking with the residents of our community finding opportunities for Democrats to be heard. Creativity with booth decorating and parade planning.

Letter Writers – Time week 1 – 2 hours	People who are willing to write letters to the editor of all 3 major newspapers. Many people read the letters and not everyone feels comfortable writing the letters, occasionally offering assistance in wording the letters of others. Skills – Strong writing skills and a willingness to help others with their own letters
Right-to-Work – Time per month 3 – 4 hours	The Right-to-Work initiative is once again trying to get on the ballot and needs signatures to make it happen. We need people who would be willing to coordinate signature drives at events, outside stores, etc. Skills – The ability to find volunteers and schedule volunteers for each signature drive.
Headquarters Coordinator – Time – needed only during September and October of election year – could be 2-4 hours daily	Volunteer who would be responsible for finding HDQ location, staffing while open and closing up after election Skills – knowledge of downtown area and able to manage staffing and supplies
Host/Hostesses – Time – 2 hours for event; possibly 6 hours in prep time	People willing to host coffees or socials for candidates giving friends and neighbors the opportunity to meet the candidates and ask questions. These types of events are important to campaigns Skills – The ability to get people to attend your event