

"MY CAMPAIGN THRIVED THANKS TO SQUARE ONE."  
CONGRESSWOMAN LAUREN UNDERWOOD

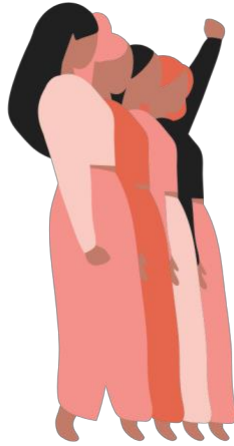
# THE NEW CAMPAIGN PLAYBOOK



Bold Ideas for  
Running, Winning,  
and Transforming  
America

**BY MITI SATHE & WILL LEVITT**  
WITH **JUDITH WARNER**

A PUBLICATION OF SQUARE ONE POLITICS



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## How to Read This Guide

In the coming pages, you'll find comprehensive, nuts-and-bolts information on running for office, with stories from the campaign trail that focus on the experiences of Square One's Congressional candidates in 2018 and 2020. We've combined our own first-hand observations with anecdotes and insights from present and former candidates, elected officials, and campaign professionals, who very generously made time to speak with us during the highly contentious and chaotic 2020 election season.

This guide was designed primarily for those considering a run for office, those already running, and for campaign staff and advisors. It's our hope, too, that volunteers, organizers, students, donors and others find this guide useful as well.

The candidates we've highlighted in these pages are some of those with whom we've worked most closely, but we are confident that the information we will share is relevant for all people who are contemplating or beginning a run, and will be particularly useful for political newcomers.

Most campaigns follow a predictable timeline, and so we've set up what follows in a form that allows us to walk readers through all the steps in logical progression. We've tried to anticipate and answer the questions we think are most likely to come up at different points along the way. You can read through the sections in sequence, or you can jump to whatever subject is most on your mind.

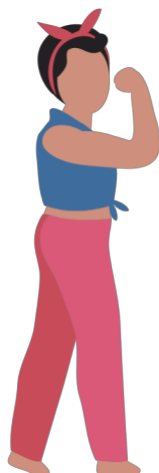
Either way, you'll get a compendium of the best and most updated knowledge and advice we can offer. If you're considering a run, we hope it will inspire you. If you've already started, we hope it will help you.

And if you need more information, please don't hesitate to reach out to us at: [run@squareonepolitics.org](mailto:run@squareonepolitics.org).

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## Introduction: Your Face Here

“I don’t care about being in the press. That’s not important. It’s the 14th District and changing the narrative that communities like mine aren’t flippable. Because if people around the country believe in the suburban swing districts, then we will win.”

*Congresswoman Lauren Underwood, Illinois 14th, March 9, 2018*

**Imagine this:** You’re a newly elected member of Congress, sitting in your office on Capitol Hill, representing thousands of people back home in your Midwest district. Just 18 months ago, you’d never run for office, never launched a campaign, never led campaign rallies, or talked on live national TV — much less flipped your longtime Republican district from red to blue.

And yet here you are. You did it.

You pulled it off because, at some point, you had a feeling that you could. And then something — a desire for change; a dawning awareness that, when it came to the problems in your community, the cavalry wasn’t coming — tipped that feeling of *could* into *should*.

We’ve seen it happen over and over again. In fact, the dream vision above is the story of one of our candidates, Congresswoman Lauren Underwood, a nurse with a pre-existing condition who in 2017 was so alarmed by the Trump Administration’s promise to take away affordable health care that she jumped into the ring. A Black woman who had served in the Obama Administration, she ran in Illinois’ 86% white, part-rural, part-suburban 14<sup>th</sup> District,

and — with no prior experience and no meaningful party support when she began — defeated six white male primary opponents and then a four-term Tea Party Republican incumbent. In 2019, at age 32, she became the youngest black woman ever sworn in to the United States House of Representatives, occupying a seat formerly held by Dennis Hastert, the longest-serving Republican House speaker.

Lauren Underwood’s journey from everyday citizen to Congresswoman may seem daunting, even impossible for you to imagine. And yet, if you’re reading this, it’s probably because you’ve been bitten by the bug of what-if and why-not-me political daydreaming, too. You may be someone who’s considering a first run for office or is at the very beginning of their first campaign. Or someone with no experience in the campaign world who’s about to start helping a first-time candidate prepare a run for office and is wondering where to begin.

We hear you. For the past three years, we’ve been working with people like you, accompanying them on every step of the journey from thinking about entering politics to running to winning to transitioning to office and governing. Or sometimes, to not-winning, and to going on to do other equally valuable things.

“We” are Will Levitt and Miti Sathe, co-founders of Square One, a non-profit PAC we started in the early months of 2017 when, like many Democrats around the country, our shock and grief about Donald Trump’s election turned into a resolve to *do something* to create change. It was clear to us that the old political playbook wasn’t working for Democrats, who were out of power not just in the White House, but in the House and Senate and, around the country, in 34 state legislatures — the governing bodies that make the all-important decisions about how Congressional boundary lines are drawn. The problem wasn’t just that Democratic candidates weren’t winning; Democratic voters weren’t even turning out to the polls, because such a large portion of the electorate — Democratic-leaning young people and people of color above all — had come to feel that there was no point. Politicians didn’t seem to really understand or care about the challenges that most people were facing — and if they did care, they weren’t acting on the feeling. It was all the same old, same old.

We knew we needed a new cohort of idealistic and deeply committed Democrats — people who weren’t part of the long-entrenched party machine — to take their seats in the rooms where big decisions are made in Washington. We were part of the huge, emerging, and unprecedentedly diverse generation that was starting to make its mark on American politics. And we suspected that we had a collective skill set that we could put to very good use in helping the sorts of insurgent candidates we wanted to see in elected office: a flexible, creative, and go-for-it startup mentality based on decades of combined experience in small business entrepreneurship, creative marketing, and working on political campaigns, with particular expertise in the rapidly-evolving world of digital communications and media. Above all, we shared a mission: To find and help elect new, bold, and highly effective Democratic leaders who look, think, and have experienced life like the full range of the people they represent. If we could find and support candidates who would really excite and mobilize voters and inspire them to turn out at the polls — diverse candidates who know all too well what it is to have to hustle for work, worry about health care, and bear the burden of crushing

student loan debt — we believed we could permanently change the face of our country’s political leadership.

From our previous professional lives in and out of politics, we knew that the structural barriers blocking opportunities for people of color were alive and well and powerful – even in the purportedly “post-racial” Obama era. And from early conversations we had with promising potential leaders who told us they couldn’t run for office because they didn’t have the time, the resources, the connections, or even *the slightest clue of where to start*, we saw that there were a set of very specific structural impediments that were keeping young people, non-wealthy people, women, people of color, and members of the LGBTQ community from running for office.

We decided to work exclusively, hands-on and intensively, with those kinds of candidates, and to focus on getting them into Congress. We went right into their districts, helping them take down the barriers to entry that have consistently kept people like them out of office. We helped them understand how to find out which paperwork to file and how to fundraise, how to find office space and hire staff, how to conceive and carry out campaign strategy, deal with media, and navigate the inside-baseball world of Washington politics.

We concentrated our efforts on flipping red districts blue — particularly those that were previously overlooked by the Democratic Party — and on making a long-term commitment to those districts so that we could help make sure that talented Democrats would be present on the ground in every single district in the United States. And we made it our mission to support people from underrepresented and underserved communities who lack personal or family wealth, powerful and wealthy connections, institutional backing and the sense of entitlement that helps launch so many political careers in the first place. In fact, our goal has been to make voters, donors and the candidates themselves see that those seeming disadvantages are actually great sources of strength.

We’re proud of the work that we’ve done. We’ve learned a lot along the way. And we’ve written this guide so that we can share our accumulated knowledge with you.

*It is not (just) a tool kit.* We won’t simply give you a list of bullet points to navigate at your own risk. We’ll show you what it feels like to run. What it costs – emotionally, financially, and in time away from work and family. We’ll demystify the world of paperwork, fundraising, communicating with voters, turning out voters, and navigating the dizzying world of paid campaign consultants who will offer to help you with all the above. We’ll show you how to run a campaign and we’ll tell you the stories of people like you who have done so successfully. We hope we’ll be able to help you see that it’s not only *possible* for someone like you to run for Congress (or for any office); it’s totally doable.

Our candidates have accomplished great things: they’ve energized thousands of people to become politically active for the first time, flipped districts thought to be unflippable, successfully changed campaign finance law to help working parents run for office, and proven that diverse candidates can win in districts in every corner of America. When we first started in 2017, we picked eight candidates to back and we thought, *if we can get one of our candidates past their primary, we’ll consider it a big success*. All our candidates won their primaries in 2018. Three of them went on to win their general elections, flipping

their seats from red to blue in the U.S. House of Representatives. All of our candidates, whether they won or lost, shifted their districts to the left by an average of 16 points. And in the extraordinarily difficult congressional elections of 2020, all of our incumbent candidates held their seats.

Collectively, our candidates have created a blueprint for leading our country bravely into the future — whether or not they won their individual races. We're going to show you how they did it. It wasn't easy, for sure. (But then, as the saying goes, nothing worth having comes easy.) Great candidates do tend to have a kind of magic about them — a special *something* that makes people's hearts sing when they speak — but there's nothing magical about winning. All the things about politics that from the outside look glamorous — the parades, the public adoration, the glory, and the general fandom — actually take months and months of planning and hard, grueling work.

But that's okay. After all, hard work and careful planning have a big silver lining: unlike magic, they're real. Anyone can successfully do them. Including someone like you.

So let's get started, so *you* can get started on running, (hopefully) winning, and transforming America.





## Step 1: Getting Started

*Why are you running? What do you want to do? And why should anyone believe in you? If you can't make that case to yourself, you'll never be able to get it across to others. When we first meet candidates, we ask those questions. You've got to do the same. Tell your story. And retell it and retell it. Once it's working, you can go out and see if it flies.*

During her first campaign for the Massachusetts 7<sup>th</sup>, the now two-term Congresswoman Ayanna Pressley visited a shelter for women who were experiencing homelessness. One of the women there told her how much she'd loved one of Pressley's campaign ads, which showed the then-candidate riding a city bus through her district as a way to illustrate its vast economic and racial diversity. Watching from her shelter, the woman had felt seen and represented. And now she was all-in, she told Pressley, because, as the Congresswoman has repeated many times since, *"Change can't wait."*

That feeling of urgency is what propels insurgent candidates like Pressley —and candidates like ours — into wanting to run for office. The decision to run comes from the gut. It's essentially a leap of faith. Getting *ready* to run is where heart meets head. It's where you figure out if and how you can arrange your life for a solid 18-month period in which — *if* you win your primary — you are going to eat, sleep and live out campaigning as close to 24 hours a day as your body can handle. It's when you'll figure out if your relationships are up to the challenge. And when you have to ask yourself if *you* are really up to the challenge.

Running for Congress — or any office — is one of the most meaningful and rewarding things that you'll ever do. It also may well be the most difficult — in every possible way. For that reason, the first thing we do when we first sit down with a candidate, while we're getting to know them and before we'll commit to working with them, is guide them in really thinking over in depth why they're running, and what they plan to do while running to make sure they can hang in for the long haul. We call it laying out the Good, the Bad and the Ugly. Our point in doing this is not to scare them off, but to help them be prepared to maximize the good, manage the bad, and mitigate the ugly.

How can you set yourself up to do this? You prepare. And you start by asking yourself some very tough questions about who you are, why you're running, and whether you can currently handle the extraordinary pressures of running a campaign. ready to handle the extraordinarily hard work it's going to take to run a campaign. The place we always start is by asking candidates to tell us their story. Your story says a lot about if you're running for the right reasons and if you've got what it takes to convey those reasons to voters. Your story can and also should convince voters that, if elected, you'll have the skills to get the job done.

After reading this section, you should be able to answer the questions we ask above. In addition, you'll have a blueprint for figuring yourself out and plotting out your life so that you and your family can undergo the rigors of a campaign and win or lose, come out the other end feeling whole.

“I got into politics kind of by accident. I was getting my master's in public health, in a program that focused on health policy ... and from there came the realization that nothing would change without the right people in office making that policy, and that the Republicans had no interest in helping families like mine; they were making bad policy by choice. I have a husband with a pre-existing health condition, and I didn't know what else to do to protect not just his healthcare and my family's healthcare, but our financial stability as well, because I am old enough to remember life before the Affordable Care Act. I asked around to see if anyone else was going to do it. Nobody seemed to really have a plan. And that was unacceptable to me. So that's when I thought, all right, that's that: I guess I'm going to run because the cavalry's not coming. I didn't know what else I could do other than get mad and get involved.”

*Kim Nelson, candidate for the South Carolina 4<sup>th</sup>, 2020*

## **What's Your Story?**

The first-time candidates we work with enter their races facing incredibly tough odds. They don't have wealthy friends or family, fancy connections, or jobs they can afford to leave while they start campaigning. But what they do have, every time, is a clear vision for their candidacy, a genuine sense of themselves, and a powerful way of demonstrating how the story of their lives has led directly to their run for office. They exude authenticity. Not the imagined, packaged “authenticity” we often hear political pundits talking about, but the real

thing. That you-know-it-when-you-see-it thing. Voters can feel it. Real authenticity is something you just can't fake. And the vehicle through which candidates communicate it to voters, especially at the start, is their story.

A candidate's story, in this early stage, doesn't have to be perfect. (And it really shouldn't be — a story that's too polished is always a real turn-off – and every time you retell it, either out on the campaign trail or before, it'll get a little bit better.) It has to be good enough for voters to get a clear sense of whether the person is authentic and if their campaign is for real, which basically means that they're using their own personal experiences as a jumping off point to help others and are running for something bigger than themselves.

This is what struck us, straight-away, about the now-second-term Congresswoman Lauren Underwood. When we first met her, in October 2017, she was still a new candidate, with a tiny and extremely underfunded campaign that she was operating out of her home while driving back and forth to Chicago to teach nursing most workdays. She had so little of a campaign apparatus, in fact, that we had to contact her via LinkedIn. We spoke with her by phone, and then flew out to Chicago and met her in a barbecue restaurant right outside of O'Hare Airport. And from the moment she opened her mouth and started telling us her story, we just knew: this is *it*. She was the real thing.

Lauren Underwood was running for Congress because her district's four-term Republican incumbent, Randy Hultgren, was threatening to get rid of Obamacare. She had a pre-existing heart condition, and knew personally that, if health insurance was going to be taken away, it was really going to hit her and her family and other families like hers extremely hard. From her professional life as a nurse, she'd seen up-close how many other people with chronic conditions desperately needed the protections of the Affordable Care Act, and from her healthcare policy work in the Obama Administration, she also knew just how many people, nation-wide, would essentially be left without a life raft if it went away.

She was exactly the type of person who we knew would make an amazing candidate and a fantastic Congresswoman. She had the "it" – a combination of intelligence and empathy, a very real knowledge of how life looks and feels for most people, plus an incredibly solid grip of policy. When she told her story, she delivered all that up with a calm confidence that was friendly without being over-casual, and authoritative without being lecture-y. And she had a great sense of humor.

We recognized that "it" factor too in the voice of Lucy McBath, the now two-term Congresswoman, who first ran in 2018 to represent Georgia's 6th district. On the surface, she seemed an impossible fit for voters in that area: a Black former flight attendant and nationally-recognized gun control activist running in a longtime Republican stronghold that had kept former House Speaker Newt Gingrich in Congress for 20 years, and hadn't been represented by a Democrat since 1979. But the demographics of the district were changing: more Black and Asian voters were moving in, as were more college-educated voters, and higher income voters of all races. And she had a story that resonated with so many: her son, Jordan Davis, had been killed on the day after Thanksgiving in 2012 in a Jacksonville, Florida convenience store parking lot by a white man who'd shot 10 bullets into Jordan's car in a dispute about the 17-year-old's music.

When Lucy McBath talked about Jordan, she spoke too about Trayvon Martin, another black teenager who just months earlier had been shot by another white Florida man. She spoke about “Stand Your Ground” laws, and a court system where she’d had to fight for two years to see Jordan’s killer, Michael Dunn, brought to justice. She talked about traveling around the country, meeting other grieving moms, seeing wounded children, hearing the mix of pain and frustration that fueled her own advocacy, and realizing that speaking out wasn’t enough for her: she had to go to Washington to fight for top-down change. Just months earlier, another Florida man, George Zimmerman, had successfully defended himself against murder charges by taking refuge in the state’s “Stand Your Ground” law, after he’d shot and killed another Black teenager, Trayvon Martin. Jordan’s killer, Michael Dunn, attempted to do the same – and came close to succeeding, but for McBath and her husband’s two-year fight for a fair second trial.

When we endorsed Lucy in 2020, we were drawn to her not just because she had turned her terrible personal tragedy into a tale of resilience, but because, when she told her story, she spoke to all parents in the United States. In fact, she spoke to everyone in the U.S. who loved someone, who either had suffered a loss or knew they would be devastated by the loss of a loved one, and who was disgusted by the idea that our laws could justify – even facilitate – the kind of reckless disregard for human life shown by Michael Dunn. She would go on to tell her story hundreds of times on the campaign trail, but it never sounded rehearsed. Because, many years later, you could hear the emotion come up from the core of her being – and you could tell that she was saving her own life by trying to protect yours.

Liuba Grechen Shirley, a Democratic activist on Long Island, also had a story that turned around making mother-love a force for change. She was a person whose name had come up for us over and over again, after we’d identified her district, the New York 2<sup>nd</sup>, as one we wanted to compete in and started asking local leaders if they knew of anyone who would make a great candidate. She had never run for office before but was well-known throughout her community for having founded a local Indivisible group called New York 2<sup>nd</sup> District Democrats right after Donald Trump’s election. (“The only way I could deal with it was by writing action alerts,” she’d later say.) She had taken it from being a small Facebook group to a 2000-person membership organization. She had a reputation for being both dynamic *and* highly skilled, with an MBA and a solid background in nonprofits and philanthropies. And she lived in a district that had been represented since 1993 by a Republican, Peter King, who was both an avid supporter of Donald Trump and a fixture of the Long Island politics-and-patronage scene. For that reason, the district had long been written off by DC Democrats *and* by officials within her local party, who had been running lackluster candidates against King for years and years, seemingly fine with the fact that they didn’t raise much money and didn’t make all that much of an effort to campaign.

When we first called Grechen Shirley to talk to her about running for Congress, she said no. She was working from home while also taking care of a one-year-old and a three-year-old. Her husband had a full-time office job; both of them were making massive student loan payments, and they couldn’t afford childcare. Running for office, she told us regretfully, was just impossible.

But then she changed her mind.

“I have to do this *for* my kids,” she called us back to say. “*Because* I care so much about them, I think I could run for Congress and try to create a better country for them.”

That became the basis of her story. Grechen Shirley would talk about her fears for girls like her daughter, who were growing up with a president who treated women with contempt, and with a party in power that opposed equal pay and paid family leave and wanted to go back to a time when pregnancy was considered a pre-existing medical condition. She would talk about her son, who broke his femur during her campaign and needed to have the bone reset in the hospital, under general anesthesia — and about how, just minutes after the toddler had been rolled away, a staffer had approached her and her husband to talk about what their insurance would and wouldn’t cover. (A prelude to the fact that, ultimately, the insurance company refused to pay for the two-night hospital stay that the doctors had ordered, arguing that the procedure could have been done in an outpatient setting.)

Establishment Democrats in her area accused her of milking her child’s story for political advantage. But voters felt that both she and her story rang true — because they both were.

Love of children and the hope for a better world for them; the need for high-quality, affordable health care; the responsibility of caring for parents who are ill or aging -- as was a key, life-shaping event in the story of Sri Preston Kulkarni, whom we backed in a closely-watched and hard-fought Texas swing district in 2020 – these are all universals. The desire for a better life is, too.

Desiree Tims, our 2020 candidate for Congress in the longtime red Ohio 10<sup>th</sup>, grew up the beneficiary of that kind of dream. Her grandfather, a sharecropper in the deep South, had had to leave school after the second grade. He’d migrated north in the late 1940s to work in factories and steel mills, ultimately purchasing the Dayton home where Tims grew up. Late in life, he’d urged his super-smart granddaughter to get as much education as possible so she could go as far as her talents and ambitions would take her. She’d won full scholarships to college and law school, had interned for the Obama White House and worked as a policy analyst for Senator Kirsten Gillibrand on Capitol Hill. But the closer she came to the inner circles of power in Washington, the more it galled her to go home and see how many working-class families in Dayton were falling behind – and how many low-income people were being abandoned. The children who were drinking brown water and learning from 20-year-old textbooks. The grandparents losing their pensions after working hard all their lives. Her grandfather had by then died, but his example served as Tims’ inner compass as she analyzed and judged policy measures, backing those she believed would have benefitted him and others like him, and opposing those that would have left them behind.

“He believed in the system and that the system would work. That if you worked hard, you could get ahead,” she would say on the campaign trail, segueing from her personal story to a plan of action. “And for far too long now, so many people have been working hard, but it’s like they’re on a treadmill. They aren’t moving, they aren’t making any progress. So it’s time to make sure that we open the doors of opportunity for everyone.”

We heard her deliver her stump speech countless times, and it never got old or sounded canned. And that's because it simply was true. As Miti always says: you can't teach authenticity, but you can feel it.

Telling your story is where you need your campaign journey to begin.

If you had just two minutes to tell people about yourself, what is it that you want them to come away with?

Who are you? What are the most important people/places/experiences that made you who you are? And how did all of that turn you into someone who wants – and is able to make life better for others?

Answering those questions isn't easy. In fact, ironically enough, telling the truth about yourself, coming up with a way of talking about *your own life* that sounds unrehearsed and authentic, takes a lot of work. Especially when, as a candidate, your life story really has to be told in a way that's as much about you as it's about other people: how you're like them, how you understand them, how your entire life has led you to a point where you're uniquely able to help them.

That's a very tall order, so don't worry if you can't get it just right from the start. You'll have to refine it, edit it — a lot. You don't need to hire a campaign professional or media consultant to help you do this. But you do need to tell it to as many people as possible — listeners whose opinions you really trust — in a safe and constructive environment. And you need to take the time to make it work and be ready to accept edits.

What if you don't know where to start?

What we do is walk our candidates through an exercise that's very similar to what companies do when they're defining their mission statements. We find it to be a very effective way to draw out a candidate's values and priorities, break them down into their component parts and then sew them back together into a story *and* a plan of action.

It's a painstaking process. We sit them down and go through a relatively set list of questions, writing the answers up as single words or short phrases on a white board or — as is our preference — on Post-It Notes stuck to a wall. This strikes many people as overly mechanical, even artificial at first, but everyone we've ever done it with has ended up saying it was extremely helpful. That's because the process helps you prioritize what's really most important to you. And then it makes it much easier later on to make decisions about the direction you need to go in, because you can ask yourself each time if a specific choice aligns with your top priorities.

### **The list of questions we ask basically goes like this:**

1. Where were you born?
2. Who are your parents?
3. What was it like for you growing up?
4. What was the district like when you were growing up? (Assuming you grew up in your current district.)

5. What was your family like?
6. What were the challenges you and your family faced?
7. Where did you go to school?
8. Where did you go to college? (If you did go to college.)
9. If you served in the military or the Peace Corps or have worked in government or community organizing or advocacy, what led you to those experiences, and what did you learn from them?
10. What are you most proud of in your career to date?
11. What do you still want most to do?
12. What are you most proud of in terms of who you are personally (i.e. independently of professional achievement)?
13. What could you do for your community that would make you most happy or proud?
14. What do you want to do — and think you can do — that would create really lasting change?
15. What skills or special abilities do you have that could help you reach that goal?
16. What makes you different from other people?
17. Who or what gets you excited and energized? Where do you find your motivation?

At first, we throw just about all the words a candidate generates up on the wall. And then we refine them to about four main points that really define who they are, what their core values are, and what they want their legacy to be

The good thing about doing all of this via the Post-It Notes method is that you *have* to keep your answers short and to the point. Another good thing about throwing your words up on a wall is that you have to look up at them, confront yourself head-on, and confirm that what you've said is really true — a genuine reflection of the way you are, rather than an image of how you want to be.

What emerges from this exercise will serve as the dynamic blueprint for your campaign. Not a template — you couldn't possibly sound authentic if you were operating off a generic “cheat sheet” — but a North Star that will give direction to every bit of messaging you create and every policy position you take.

When people say that a candidate “doesn't have a clear message” or perhaps “has no message” at all, it often means that they haven't done this kind of work to adequately identify and define their core values. Sometimes that happens because they're already well-known and assume that their prior work speaks for itself. Sometimes the problem is that their message derives from polling and has been boiled down and cooked into words by a team of DC consultants and advisors. That's a trap that you can and should avoid. Outside advisors — no matter how skilled and experienced, no matter how much they genuinely want you to win — cannot define you. They also can't have the final word on what will “sound right” to your voters — because they likely haven't lived among them and haven't spent time talking to them and getting to know them.

Once again, you can't fake being real. Voters can tell if you're sincere and if you truly share their values. They also have a nose — and very little patience — for pretenders.

## Can You Afford to Run? (Making Sure You're Really Sure.)

“To run for office, you have to be incredibly passionate about why you’re doing it and you have to be a little bit crazy. If you’re independently wealthy and incredibly well-connected, it’s a completely different experience. If you’re someone like me, running for office is like having three full-time jobs. Your entire family is involved in it and your whole family has to be involved with it. So if you want to do it and not have enormous amounts of stress I would make sure you have enough money to live on for two years. And I would make sure your family is a hundred percent bought in and behind you.”

*Liuba Grechen Shirley, founder of Vote Mama,  
2018 candidate for Congress, New York 2<sup>nd</sup>*

No one runs for office in a vacuum, and no one can do it on their own. You’re going to be working seven days a week once you commit yourself to a campaign, and yet your life responsibilities — personal, professional and financial — aren’t going to go away. For wealthy candidates, this isn’t much of an issue: they can afford to quit their jobs and devote themselves to full-time campaigning, right from the start, and they can also afford the professional help — nannies, housekeepers — to compensate for whatever work they might otherwise do at home. Regular people can’t do that.

Most of the candidates we’ve worked with have kept their jobs full-time until their primaries, and many have hoped to be able to continue working even if they win their primary and go on to the general election. But that’s not realistic. There are outliers, of course — Lauren Underwood, for example, continued driving the 30-plus miles from Naperville to Chicago, teaching nursing classes for four hours and then driving back home every day to work another 12 hours or so on her campaign. But most people don’t have the job flexibility, or the stamina for that.

If you make it into your general election, you’ll be campaigning around the clock. You’re going to need backup, and the time to ask around to figure out if you’ll have it is now — *before* you fully commit to running. This means talking to your family, your friends, and your employer. Tell everyone that you’re thinking of running for office and are hoping to have their support. “Support” will mean different things in different contexts. But what the various conversations you have should add up to, overall, is an answer to the question of whether you can afford to run — in the broadest possible sense of the word “afford.”

### **Ask your job: Are they on board with your becoming a (partisan) public figure?**

How do they feel about your going part-time, as you will need to, at the very least, particularly if you make it past your primary and into the general election? If you have to leave your job to devote yourself to full-time campaigning, will you be able to go back if you lose?

Ask your family: can someone else keep your household afloat while you campaign?

Fixed expenses don’t go away. So you’ll need to talk with your partner, family, or roommates about how you’ll keep household income coming in and limit your expenses. You



want to avoid raiding your savings to finance your campaign or — even worse — max out your credit cards or take out a second mortgage on your home (yes, it happens) to fill in any shortfalls in your fundraising. Because afterwards, win or lose, you alone will be stuck with that debt.

It's not illegal, by the way, to pay yourself a salary out of campaign funds if you're a non-incumbent candidate running for federal office. You just can't receive more than what you earned in the previous year or more than what the lowest salary is for the office you're seeking (whichever is the lesser amount). The salary has to be pro-rated, so that you receive pay only for the period between your state's filing deadline to appear on the primary ballot and the date of your general election or runoff. A number of young, first-time candidates for Congress did this in 2018. But virtually no one else did or has: taking a campaign salary has long been viewed as a no-no in U.S. politics, and the candidates we work with tend to fear that their opponents will use it to fuel attacks against them: that they're "pocketing" campaign funds, for example, or just running to "get rich."

We think it's a shame that more candidates don't take advantage of the campaign salary option, given how many people would undoubtedly run for office if they could afford to. Indeed, we think that doing so — and being open about it — could be a very positive potential talking point for connecting with voters. ("My opponent can easily stop working for 18 months and fund himself off savings and investments, but I'm just like you — I can't afford to stop working.") If you're running for state or local office, be sure to check local regulations on paying yourself a salary from campaign funds, as laws differ state to state.

**If you have children, do you have good childcare?** Is it flexible? Will it be affordable if you need a whole lot more babysitting hours? If not, is there someone who can take over your share of overseeing their lives while most of your attention is consumed by your run? In addition, do you have aging parents or grandparents or siblings or other family members you have to take care of? Is there someone who can step in to help take care of them?

It also is now legal, as of May 2018, to use campaign funds to pay for childcare in federal races, thanks to a successful petition filed with the FEC by Liuba Grechen Shirley, who made the case that, for primary caretakers like her, there's no way to run for office without consistent, reliable, high-quality help. Many states have adopted a similar policy for state and local campaigns, but check your specific state's guidelines to see what applies.

Exploring all the different sides of the "can you afford to run" equation isn't just about logistics. Before you make your final decision, you're going to have to ask yourself some deeper — and potentially far more uncomfortable — questions:

**What's your relationship to money?** How do you feel about asking people for it? And how good are you at keeping track of it and being frugal? It costs an ungodly amount of money these days to run a Congressional campaign. Although the exact dollar amounts vary a great deal race to race, for our candidates, running for the first time and in tough swing districts, the totals have tended to begin at about \$2 million, and have risen as high as \$9 million. As a result, fundraising is going to be a huge part — and most likely the most

frustrating and difficult part — of the campaign work that you do. Believe it or not, you're going to be spending at least 40 hours a week calling people up and asking them for money, only, more often than not, to have them say no (if they don't just hang up on you in the first place). You'll be telling them your story, laying out your dreams over the phone, only to have them, more often than not, say thanks, but no thanks — or even, "I don't care." There are going to be days and nights where you'll get 50 of those no's, nicely or not-so-nicely phrased, in a row — and you're going to have to keep on picking up the phone and dialing on.

In addition, to keep your expenses from spiraling out of control — especially early on, you're going to have to keep a very tight hold on your spending. As you travel around your district, you may end up spending a fair bit of time on the road. Are you willing to stay with friends and supporters, rather than in hotels (at least at the beginning)? Can you trade in your lattes (or whatever your particular indulgence) for regular old watery coffee?

The justification for the luxury that accompanies executive travel is that those at the top need to always be at the top of their game. Well, guess what? You're about to become the CEO of your own high-stress, high-speed start-up in which, at first, you'll play every single role, and you'll be needing access to hardcore self-care, too. But you're going to have to recharge your batteries on Diet Coke and workout videos on your laptop, in-between calls to potential donors. (Kim Nelson, our candidate in 2020 for the South Carolina 4<sup>th</sup> District, needed to break up call time with "stretch breaks" or quick walks around her campaign manager's apartment building. When time was really tight, she'd march in place.) And, *if* you're successful enough to make it past your primary in a high-stakes, close race, you'll have to keep smiling and shining with the eyes of the media following your every move. And wardrobe change. And persistent salad dressing smudge from lunch the day before.

There can be a kind of a reverse glamor to it. A down-in-the-trenches solidarity with your team that many love. But the campaign lifestyle is not for everyone. It takes a certain kind of grit — and a good sense of humor. It takes some big-time organizational skills as well. You're going to have to keep really good records, keep all receipts, and be extremely strict about not mixing your personal and campaign funds. So if you're not good about this kind of thing, find someone else who is, and hand your book-keeping over to them, *pronto*. If you do decide to run and get to the point where you'll need to make a budget, get help from a level-headed, money-minded person as well. Because, once you start to raise money, you're going to have to be able to account for every penny of it. And speaking of knowing your limits:

What's the state of your relationship with your significant other, siblings, or parents, or whoever else is likely to be the rock who will take over whatever you yourself will find unmanageable? And are the people you love and care about — and will increasingly depend upon — *truly* with you, aware of the additional load of responsibilities that will soon come their way? And are they really equipped to take those responsibilities on?

Money is never just money in a relationship — and neither, for that matter, is time, particularly when it comes to time for household chores or childcare. No matter how frugal you are and how carefully you plan, adjusting your work time so that you can make room for campaigning is going to put a major stress on your finances — and on your closest relationships. When Kim Nelson started the 2019-2020 campaign season, she was in her final

year of graduate school, was working part-time, and was sharing responsibilities for parenting a three-year-old and a five-year-old with her husband, who also had a job outside their home. As her campaign took off, she realized she had to devote herself to it full time. To make up some of her income, her husband added a weekend job at Trader Joe's to his weekday office job — and to make up for the time he could no longer spend on housework or parenting, both their mothers stepped in to help. He often handled dinner time, bath time, and bedtime while the candidate did her 5-6 nightly hours of call time and, eventually, fundraising on Zoom. “We're frequently like two ships passing in the night,” Nelson said of her husband a few months before her 2020 general election. “But if you have a partner who can offer you that help, take it.”

If you run for office, you'll have to 100% guarantee yourself regular access to *someone* with whom you can blow off steam. A friend, a family member, a clergy person — maybe even a therapist. Your time will be so tight that you're likely to feel that you have to give up the daily or weekly or monthly check-ins with the people who keep you whole. *Don't do it.* You're going to need them more than ever. Which leads to another question:

How good are you at managing stress in healthy ways? And how is your health generally?

You have to be pretty strong constitutionally to run. Mentally and physically. You have to be able to withstand a lot of loneliness, because being a candidate can be very isolating, even if — as will be the case — you're surrounded by voters, staff, volunteers and other supporters almost 24 hours a day. There are a lot of ups and downs, adrenaline surges and blood sugar crashes. Some people weather those better than others. Some are more conscious than others of when they need to take a break and what they need to do to de-stress.

Only you — and those who know you the best — can feel when you're getting seriously over-stressed and are aware of what you need to do in order to relax. Remind yourself of that now. If you tend to fall into bad habits when you're overwhelmed, now's the time to admit to them, face them head-on, and make a plan for how you will cope. If you have any type of chronic health problem that's worsened by stress — which could be any one of a broad range of conditions ranging from depression to arthritis to eczema to migraines — think about that now, too, and plan for how you'll manage it. We're not saying that having one of these conditions should keep you from running; on the contrary, we've worked with many excellent candidates whose frustration around securing high-quality and affordable care was the fire in their belly that led them to run and helped them connect with voters. Once again, you just need to plan in advance for how you can try to keep your health conditions from getting the best of you.

Talking about stress brings us to the part of campaigning that is truly ugly: the personal attacks that will almost inevitably come your way, particularly if your campaign becomes strong enough to pose a real threat. Dirty tactics are, unfortunately, just as much a fact of American political life as is the need for big money — and today, the nastiest allegations are amplified by the echo chambers of social media. All of this tends to be worse if you're a woman, a person of color or LGBTQ, and tends to be most dramatically horrible for

women of color. All of the candidates we've worked with have received hate mail, and some have even gotten death threats, directed not just at them, but at their families. We've never seen any of those threats result in direct physical harm – unless you count the punctured tires that Desiree Tims encountered one morning when she got into her car to attend a Black Lives Matter rally. (And the five bullet holes that staffers discovered that same morning in the windowed storefront office of the local Democratic Party.) But they are always very scary, and need to be taken seriously.

That means, once again, careful planning and troubleshooting. You'll want to be sure you have reasonable security measures in place in and around your home. You'll need a plan for how you'll keep yourself safe when you're out on the road, especially late at night after campaign events: scheduled phone check-ins, at the very least, or, if possible, having a friend or family member come along with you.

Right now, the burden of costs for security lies with individual candidates, their families, and closest supporters. And candidates like Desiree Tims, who in the tense and highly polarized summer of 2020 campaigned in a 77% white, Republican district dotted with Blue Lives Matter signs, will just have to draw on all their stores of courage and resilience.

"They can flatten my tires again. They can shoot up our office again. They can burn a cross on my lawn and I will keep fighting," she told a Zoom gathering of supporters about six weeks after the twin incidents. "You can't focus on the negativity. You have to focus on the fact that I won [my primary] with 70% support of all races and all creeds."

There's one other important risk factor we'd be remiss not to mention: **Do you have any personal vulnerabilities that could derail your campaign?** Any secrets? Unfortunate photos circulating from when you were in college? You don't have to be perfect. Nobody is. And if you didn't grow up in a political family then you won't have lived all your life with an eye on always protecting your image. And that's okay. But you do have to be honest with yourself – and with your eventual campaign manager.

We believe that there's no challenge that a campaign can't recover from – except for a true moral scandal, or something really damaging that comes up from the past, such as a history of not paying your taxes, a criminal record, or non-payment of child support. You'll need to take any potential risks of this sort under consideration now, and prepare for how you'll deal with them if they come out during your campaign (which they inevitably will, if you're successful enough to come under scrutiny). Know as well that if you're a woman and/or a person of color and/or LGBTQ, voters are going to hold you to a higher standard than straight, white male candidates and will be a lot less forgiving. It's why the candidates of color we've worked with have always been so truly beyond exceptional – they have to be, just to play in the same ballpark as run-of-the-mill white candidates. We welcome the day when, like white men, they'll have the privilege of just being good-enough.

We closely vet our candidates to figure out what potential attacks may come their way from their opponents before we endorse them. This is not a side of things that we particularly relish – but it's a necessity if you're going to compete in today's electoral arena. Figure out now if you can stomach it. And, as a general rule, plan for the worst and expect the best.

We cannot put strongly enough that you can't skimp on these preliminary steps.

We would consider it a real failure if we endorsed a candidate and they dropped out three months later because they didn't realize how hard it would be. The loss of time and effort would be devastating for us all, and we would never want that to happen to you. If, however, you make it through the whole process we've outlined above, and come out of it solid in who you are, clear on your goals, and all the more eager to get the show on the road — congratulations! It's time to go out and test the waters.



## Step 2: Testing the Waters

“Running for office is not for the faint of heart.”

*Allen Chen, campaign manager,  
Sri Preston Kulkarni, Texas 22<sup>nd</sup>, 2020*

*You feel ready. You’ve straightened out your story. Now, it’s time to figure out whether your district is ready for you. Familiarize yourself with the key players. Meet the people who know other people; learn in detail about the needs of the community. And don’t get hung up if Democratic bigwigs won’t answer your calls.*

From your self-reflection and conversations with friends, family and bosses, you should know whether it’s possible for you personally to run for office. After that, you’ll need to figure out whether it’s plausible politically.

No matter what office you are running for, you should take the time to consider the feasibility of your campaign before committing. Check the applicable campaign finance rules to make sure you are not required to file any paperwork while in this exploratory phase. If you’re considering a run for federal office, federal law allows you to “test the waters.”

“Testing the waters” is an actual legal term. It refers to the period when you’ll “explore the feasibility of becoming a candidate,” as the [Federal Elections Commission’s website](#) puts it. It’s a very important time — a sort of pause-to-think-it-over period — in which you can ask

a lot of questions and get a great deal of information without filing the paperwork that will formally declare your candidacy and bring on all the legal restrictions that accompany running for Congress. That means it's much easier to seek advice and get support from people like us than it will be — regulation-wise — once you do file your paperwork and officially start your campaign.

While testing the waters as a federal candidate, you can talk to campaign advisors. You can travel in your district to gauge what kind of support you might expect. You can do polling, according to the FEC, though we'd advise against it at this point. You can even do some preliminary fundraising (generally among family and friends, if they can swing it), *but* — and this is a big “but” — as soon as you raise or spend \$5,000, then you *have* to register as a candidate with the FEC. You can't “test the waters” for an infinite amount of time or right before an election. You can't, in this period, refer to yourself as a “candidate for Congress,” or run ads or do phone banking declaring your intent to run. You have to make it clear that you're raising money for the [Your Name Here] Congressional Exploratory Committee or for the Friends of [Your Name Here], and *not* for the [Your Name Here] for Congress Campaign. You don't have to open a bank account at this point, but it's a good idea, just to make sure you won't be commingling your personal and potential campaign funds. If you do want to open a bank account, you'll need first to contact the IRS to request an employer ID number (you don't want to use your own social security number). You also need, right from the start to keep really good records so you can accurately track how much you've raised or spent.

**What's the point of all these fine distinctions?** So that you don't formally and fully commit yourself to a campaign before you're quite sure that you're ready to do so.

Be aware that, if you do end up running, only some of your expenses from the testing the waters period will be eligible for reimbursement by your campaign afterward. You may be reimbursed for campaign-related travel, for example, or for paying for meals where the sole purpose is to explore the feasibility of your campaign. Other expenses, however necessary, will remain yours alone. (Campaign-trail-appropriate clothing, particularly for women, tends to be a big and glaring one. Men in politics have the privilege of getting by with a relatively budget-friendly uniform of regular pants and button-down shirts, but women are still ferociously scrutinized — and need an ever-changing wardrobe of event-ready attire. So, once again, be prepared. Watch your spending. And keep scrupulous records.)

If you're running for state or local office, most states don't have a Testing the Waters that applies. Check your state's campaign rules for guidance.

And now, with all that squared away, you can move on to the good stuff.

## **Take a Really Good Look at Where You Are Running**

Your number one most important job at this point in the campaign is to get to know your area — whether it's a congressional district, city council seat, or school board district. Nine times out of ten, you'll already have a pretty solid foundation, either from having grown up there, or from having spent enough years living there, and having been an active-enough

citizen in the community, that you know people, and people know you, and know about your commitment to the issues they care about.

You'll have a big leg up if you're already active in your community through your work or your union, or your children's school, for example, particularly if people already think of you as a strong organizer or a leader. If that isn't the case, it's not fatal: you'll just have to work harder to introduce yourself, and you'll have to be rigorous about always remembering to ask for still more introductions. And if you haven't lived in your community for very long — or if you grew up there and then moved away for many years and have just recently returned — you'll need to find out if it has recently been changing, and if so, in what ways.

For example, if you're running in a red district that's trending purple, check for indicators that, with the right candidate, it could potentially swing blue. For example: has it vacillated between Democrats and Republicans in recent elections? (The Ballotpedia website will tell you that.) Is there a steady increase in the proportion of its residents who are young, college-educated, women (especially college-educated women), and people of color — all groups known to favor Democrats (though not always and not in every district) and who may not yet have been registered to vote in the district at the time of the last elections?

Individual voter data will have to be obtained by the state party or a vendor, for a cost that varies state to state (or, in some states, is free). To avoid that cost during the testing the waters there are some public sites that provide quality data. The Centers for Medicare & Medicaid Services has a [page](#) on its website where you can find the number of people in a state, a county, and even a zip code who are participating in Obamacare, which we've found is a potential indicator of good will toward Democrats in general. Your county elections office or Secretary of State may also provide voter data for free, with basic information like party affiliation.

You should also do some initial research to find out how strong or vulnerable your current representative appears to be. If that person is extremely popular and is doing a good job in meeting constituents' needs, you probably don't have an opening. But if their win-margin in recent elections was narrow — or if it was wide because their opponents were under-resourced, unknown, or simply unappealing — then that's another story. If you've been living in your district for a while, you're likely to know at least some of that information. In addition, all the basic information about the win-margins, going back for years, as well as overall fundraising numbers are available online on sites like Ballotpedia.

In other words, you don't need to pay for fancy professional research at this point to get a solid sense of the lay of the land. Much of the information is out there, if you're willing to dig. That said: There's only so much you can and should do online and on your own, however. If you really want to get a feel for the district you hope to represent, you've got to get out into the community.

## **Meet Your People**

Talk to the local leaders — school principals, PTA heads, or members of the clergy, for example — who have their finger on the pulse of their communities. Find out how they feel



about the person currently representing them, and why. Hear *in their own words* what the big issues of concern are among different members of the community, and what they'd like to see changed. Find out what they want, what they hope for, what they lack and regret, what and who inspires them and makes them dream. What makes them laugh, what makes them nod, what makes them look doubtful, or maybe tune out. Listen for the words they use and the stories they tell, and the real-life examples of the way that policy — federal policy — makes their lives better or worse.

You'll need too to get a read on the political atmosphere, and on the climate of party politics that you'll be entering. You'll need to reach out to your district's power brokers and organizers and political influencers, too: the Democratic Party county chair, for example, or the precinct captain, or a local Democrat who ran for the district's congressional seat in the past (if that makes sense — not if they're running again and there's going to be a primary), or local mayors, county commissioners, members of the school board.

You should meet for coffee or for lunch with local donors and people who have worked on campaigns in the district in the past — anyone and everyone who will sit down with you and give you the lay of the land. They're going to be your people; see if you click with them. Find out what sorts of Democratic or progressive organizations exist outside the party proper. Get a sense about whether they'll support you — and to what extent. Find out what kind of primary challenge is likely, what alliances are already in place, how much money and loyalty are already sewn up.

These early getting-to-know-you conversations are crucial, and when you're having them, you'll see why it was so supremely important to find a way to tell your story well — both comfortably and convincingly — before you even made your first phone call. If you want people to support you, you've got to catch their interest and come across, right from the start, as a compelling and promising possible candidate. You can't do that if you don't really know, or can't quite articulate, what you're about. People will tune you out before you even get around to sharing with them what you have to say.

In addition to calling your local Democratic officials, it's time now as well to reach out to the Democratic Congressional Campaign Committee (DCCC) — if you're running for Congress — and let them know that you're considering a run. You may be able to have an initial conversation with someone there — or, more likely, they'll say, call us back when you've raised some money. Don't worry about that. The important thing is to give them the heads-up, as a matter of basic protocol and courtesy. Because the unfortunate truth is: if you're a newcomer, and especially if you're a non-traditional candidate, no one within the Democratic political establishment is going to open the door and say, here's a seat at the table. This will make things harder than if you came to politics with your money and connections and pedigree all tied up in a bow, but it can also serve you well as a fire in the belly. As Congresswoman Shirley Chisholm used to say (and Hillary Clinton liked to remind us): "If they don't give you a seat at the table, bring a folding chair."

The early brushoff that you are likely to get from the Democratic establishment (at least until you can show them the big money) is why it's going to be urgently important for you to cultivate a grassroots coalition — or build upon one that already exists. Nothing drove

this home for us more clearly than Liuba Grechen Shirley's experience testing the waters and as a Democratic candidate on Long Island in 2017 and 2018.

She knew everyone in her local party hierarchy from the days and weeks and months after the 2016 presidential election. She'd wanted to volunteer for the party then, and to help rally other Democrats into a local resistance group. She'd met the county Democratic chair and all the party commissioners — and had ended up forming her own activist group, in large part, because the local Democratic establishment leaders had all been so unresponsive or unhelpful. That effort proved enormously valuable, however, once she became a candidate, because she knew the local power structure inside-out. She not only knew she knew every person who had any influence, she knew why they were motivated to act and make choices the way that they did; she knew the details of their history and their allegiances and their life stories. She had enough of a complex understanding of just how the system worked that she could figure out how to be an insurgent candidate within it. She also had amazing grassroots support already in place — hundreds of volunteers who could seamlessly start volunteering for her campaign. That's why she was able to definitively win her primary — *despite* the party's efforts to maintain the status quo by strenuously supporting her primary opponent, DuWayne Gregory, who had lost in 2016 to Republican incumbent Peter King by 24 points.

If you encounter a similar lack of enthusiasm from the party at the outset of your campaign, don't let it stop you. Despite all the high-profile wins in recent years by non-traditional candidates, old ideas about who's "electable" die hard. We've seen or heard of any number of talented candidates who were discouraged from running because they were told they weren't "right for the district" (because they didn't look like the people there) or were "not ready" or "needed to wait their turn" (because there was someone with institutional support lined up before them). There have been times when we've been laughed out of powerful people's offices because of the districts we were targeting and the kinds of candidates we were supporting. But when those candidates started winning their primaries, those skeptics took another look. They started sending endorsements. And, if our candidates were lucky, they provided funding as well. Bottom line: don't listen to naysayers.

The people you *should* listen to now are the ones who can be concretely helpful. If there's an elected official (or former candidate) whom you particularly admire and feel an affinity with, see if you can get a half-hour of their time to pick their brain for your own potential run. Worst thing that can happen is that they'll ignore you or direct an aide just to give you some cursory attention. But if there is indeed that affinity you suspected, they're very likely to do more: share inside knowledge, perhaps, make introductions, and, if you're really lucky — perhaps offer to serve as a mentor.

This could also be a good time, if you haven't done so before, to try one of the training programs offered by organizations such as Emerge America (for Democratic women), Higher Heights Leadership Fund (for Black women), Latino Victory (for Latinx candidates), EMILY's List (for pro-choice Democratic women), and Arena. These are group programs, and as such, they aren't perfect — every district, every candidate, and every race, after all, is different, and one-size-fits-all lessons can only go so far. But our candidates have found that they do offer great opportunities for networking and for finding like-minded friends. Lauren Underwood

and Sarah Feldmann, a then-investment consultant who went on to become the Congresswoman's first campaign manager, for example, met and became friends at a 2017 Arena training, bonding as they tried to get their heads around "the strange and relationship-based, and very opaque" world of politics, Feldmann recently told us.

Once you've gathered the insights you need about your district, and have talked to enough people to see if you can count on your community for support, you should have a solid sense of whether your candidacy makes sense. If the answer is yes, then: hooray! It's time to declare yourself a candidate and start campaigning.

Before you move on, though, a couple of last words, just in case you start to get some pre-announcement jitters: Putting yourself out there authentically and putting your hopes and dreams in the hands of the electorate can be a terrifying prospect. Virtually every one of our candidates has called us the day before filing and asked, *Am I making a mistake?* And we always say *no*. Because we know that if they've worked with us, and have gone through all the steps we've laid out so far: the soul-searching and storytelling (and retelling); the examination of (and problem-solving around) the good, bad and ugly; the conversations with employers and family members; the accounting of time and lost income; the district research and analysis; the meetings with powerbrokers, grassroots leaders and "regular" people alike — if they've done all that, understand the uphill battle before them and *still want to run*, then we know that they've got what it takes to stay the course and have a good shot at winning.

And if you do all that work, you will, too.



## Step 3: Preparing Your Launch

“Spring of ‘17, did I think that we could win? Yes. I thought that we could win. Did I know how we were going to do it? I did not. Did I know how to run for Congress? Not necessarily.”

*Congresswoman Lauren Underwood, Illinois 14<sup>th</sup>, as told to Kara Swisher on Vox Media’s Recode Decode Podcast, August 5, 2019*

*You’ve decided to run. You’ve raised some money. That’s great. Really exciting. Now you’ve really got to get all the practical matters into place. So let’s get down to brass tacks.*

### Get Essential Help

If you’re like most of our candidates, you won’t have the money at this point to hire professional staff. That’s fine — but you *will* need help. Legally, you can be your own treasurer, but it would be a mistake: you’ll have no one to fact-check your bookkeeping, you’ll be too busy to keep track of every Staples receipt, and the stakes are too high for mess-ups. Once you decide to run, you will need to set up an official campaign committee and track the money you raise and spend on your campaign. As soon as you file your official paperwork, you’ll be subject to all your jurisdiction’s campaign regulations, and if you mess up, you could

open yourself up to a whole world of pain, even if your intentions were good and your mistakes perfectly innocent. Most people recruit as their treasurer a friend or family member with a good head for numbers (or at least good common sense where money is concerned), strong attention to detail, and the ability to follow directions to the letter.

In addition, precisely because campaign finance regulations are so confusing, and complying with them so all-important, you should, right now, hire a compliance firm, which is similar to an accounting firm, but for campaigns and PACs. This firm will do all your campaign finance compliance work for you once you start needing to file quarterly reports on your fundraising and spending. You should at this point also engage a lawyer who will look over your contracts when you start hiring staff — and who can in general provide legal counsel to your campaign. Be sure to choose an attorney who is specialized in campaign finance law, as you'll need them to also look over all the quarterly reports put together by your compliance firm. Finding the right compliance firm and lawyer can be challenging, but it's worth the effort to find people you trust. Ask other candidates you know, the local Democratic Party or others PACs and political organizations you're familiar with for suggestions.

Beyond outsourcing two essential functions to professionals, most candidates without money behind them tend at this point to do all the work of setting up their campaigns themselves, usually with the help of one highly-trusted other person (a family member, a close friend; unpaid) who can take over financial record-keeping, serve as a sounding board, and generally provide them with the basic life support they need. If all goes well, that person may remain your lifeline throughout your campaign. (Note, there may be campaign finance rules that apply to your race about paying family members.)

Whether or not this person has actual campaign experience is, in our opinion, far less important than whether they have what it takes to keep your energy up or help you unwind, make you laugh, keep you connected to your “real” life beyond the bubble of campaign land, and in general, help you be your very best. Having a helper (or helpers) who can cross the personal/professional divide — pick up the dry cleaning; buy milk; maybe even provide impromptu therapy and emergency childcare — will be absolutely essential when it comes to maintaining your well-being over the long haul. At the very least, they can help distract you from whatever parts of campaigning you find most unappealing — which for our candidates turns out just about always to be fundraising.

Similarly, if you're running for state or local office, most states do require declaring a treasurer and forming a committee once you've raised a certain amount of money. Be sure to check applicable guidance in your state.

No matter how much we talk about it beforehand, we find that candidates always are shocked when they encounter the reality of having to spend five to six hours a day asking for money. (The dreaded “call time.”) Our best advice on this: be prepared for the inevitable fact that you're going to be *unprepared* for how much time and effort you spend fundraising — and factor that in, with some extra time padding, when you start to get organized.

## **File the Paperwork<sup>1</sup>**

For most offices, you are required to file paperwork establishing your campaign committee once you become a candidate. For example, in federal races, as soon as you've raised or spent \$5,000, you *must* declare yourself a candidate with the Federal Elections Commission and file the paperwork to officially set up your campaign. Fortunately, the FEC has all kinds of instructions — even videos — available online to walk you through the early steps, and the forms you'll need are on its website as well. Unfortunately, these efforts at user-friendly communication do nothing to change the fact that the whole system is inordinately confusing.

Just for starters, step 1 is to file Form 2.

Form 2 is your statement of candidacy, which sets up your main “campaign committee,” which is the entity to which people will donate money and from which you'll pay salaries, consulting fees, and other campaign expenses. For the campaign committee to operate, it will need its own designated bank account. If you opened an account previously for your exploratory committee, you can roll it over. If not, this is the time to open a campaign-specific bank account, the first step being — again, if you didn't do this before — contacting the IRS to get an Employer ID Number to link to the account.

Once you've done all the above (and within 10 days maximum), you'll go on to step 2, which is to file Form 1 — a “statement of organization,” which registers your campaign committee with the FEC. And after that, you'll have 10 days in which you'll be able to make changes to that statement of organization — adding bank accounts, informing the FEC of any additional fundraising committees that will operate in addition to your main campaign committee, and providing the name and contact information for your treasurer, who from this point on will be responsible for keeping track of finances and making sure that all necessary reporting to the FEC actually gets done. Again, check state law for local and state races.

## **Make a Schedule**

If you have the guts, the drive, the vision, and the risk tolerance to run for office, then you're probably better at getting people excited about big ideas than you are at sitting down and channeling your passion into a calendar app or a spreadsheet. That's why you need your essential helper — and why you also need to force yourself to do some active, anticipatory planning.

The filing deadlines and requirements for getting on the ballot vary state by state. They include gathering a certain number of signatures, and always include paying a fee

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<sup>1</sup> The following is not meant to constitute legal advice — always consult with a lawyer for questions regarding FEC regulation or state campaign law.

(usually in the range of \$500- \$5,000), so be sure to find out when the deadlines are in your state and make note of exactly what will be required.

Make sure that your schedule includes the all-important deadlines for filing campaign finance deadlines, showing how much money you brought in, from whom, and how you spent it (your compliance firm will help with this).

Be prepared for the fact that some of the basic things you'll soon need to do — setting up a simple website landing page or an ActBlue page for early fundraising; creating a relatively straightforward website with the basics of who you are, why you're running, where your events are, how to volunteer, and, of course, where to send campaign donations — are going to take *way more time* than you think they will. The slowness is partially due to the fact that there are so many regulations to navigate once you're officially a candidate. And partly, it's a side-effect of the cyclical, feast or famine nature of the work done by the firms that specialize in web design, digital services and communications for campaigns: they get really busy really fast, and everyone needs their services at the same time. For all the same reasons, their fees can be astronomical, compared to the costs for similar services out in the civilian world.

Plan for that in advance as well. Then bring that same level of foresight and caution to how you handle your campaign money overall.

## **Make a Budget**

It's all well and good to commit yourself, in theory, to living cheaply and operating your campaign on a shoestring. But your best intentions won't come to a hill of beans if you don't have a reasonable sense, from the start, of how much money you're going to need.

There are quite a few campaign budget templates that you can access online. (Arena, in fact, has a whole trove of documents and videos in their online "Toolbox" covering many aspects of setting up and conducting a campaign, and their materials tend to be consistently good.) Templates can't, however, tell you how much you can expect various line items to cost, and those costs can vary a great deal depending on where you're running, the size of your district, and how hard-fought your race is going to be.

We'll lay out some approximate numbers for you now so that you can get a sense of what expenses are likely to come your way early on and how they add up. They represent expenditures for a first-time candidate running on a shoestring budget in a suburban red area not far from a major city. They cover the period from when that candidate started testing the waters through the first twelve weeks of their campaign. And they reflect a candidate who is being extraordinarily frugal, running the campaign from home without a paid staffer for the first two months, and doing as much basic website and advertising work as possible on their own.

(If you want to get a more precise sense of what a race in your district is likely to cost, you can look up the fundraising and spending numbers for the candidates who ran in the last two election cycles on ProPublica, which will give you access to their FEC filings in a very accessible way. Just understand that, if you're thinking of running in a red district where the

Democrats haven't invested much in the recent past, the fundraising and spending numbers will be unrealistically low. In that case, you'd do well to look at other recent Congressional races in similarly-sized districts involving new candidates who are similar in some salient way to you.)

### **The First Chunk of Money You'll Need for a Congressional Race**

Advertising: \$458

Bank fees: \$51

Mailbox rental: \$200

Website hosting: \$400

A plain but serviceable website for which you do a *lot* of work yourself: \$1,300

Compliance firm: \$5,250

Credit card processing service fees (for political donations): \$1,352

Odds and ends of office supplies, ad production, music license, postage, internet and subscription services: \$186

Printing: \$4,771

Filing fee: \$500

Catering and event space rental and entertainment: \$2,625

Consulting and online training: \$750

Salaries: \$9,236

Payroll taxes: \$4,168

Payroll processing fees: \$174

Travel: \$5,058

Payment to the state Democratic Party for access to the district's "voter list" (a list of district residents, usually including names, home addresses and party affiliations, though content can vary, along with the price): \$2,000

Subscription to a voter contact management software program: \$2,250.<sup>2</sup>

**Total Approximate Cost: \$40,729**

For seasoned campaign professionals used to working on big-budget races, \$40,000 worth of early expenditures will sound laughably low. But for one person, raising that money on their own or with one helper, it's a lot.

Fortunately, for federal races, the FEC does allow for a way to make things a bit easier: well-wishers may offer their volunteer "personal services" free of charge. Laws may vary for state or local campaigns.

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<sup>2</sup>This was the cost in 2018 for three months of service in a particular district for a basic-level subscription to NGP Van's VoteBuilder, which was the software program used by just about all Democratic campaigns at that time. There are other options now.



So your website, for example, might end up being the work of a skilled friend or supporter who does it for you at a greatly discounted price. Your initial campaign video might be shot by some film students eager to get hands-on experience. However, any expenses connected to these services (e.g. web hosting fees or equipment rental) would need to be paid for by the campaign or counted as an “in-kind” donation, “a contribution of goods, services or property offered free or at less than the usual and normal charge,” as the commission’s website defines it. “The term also includes payments made on behalf of, but not directly to, candidates and political committees,” it adds.

In a federal race, you have to report all these contributions (for state or local races, check applicable guidance), just like all your big-ticket items — consulting fees, advertising, and salaries, for example — that will cost you way, way more.

Which is why you’re going to need to start fundraising in earnest *as soon as possible*.  
But first: Take a deep breath.

You don’t need to have *all* the money you’ll need for your campaign right now. You’re not going to be able to raise all that money right now. What you do need is enough money so that you can hire someone to work with you as soon as possible. Someone who can relieve you of day-to-day minutiae so that you can put your own time and energy into meeting voters and helping them get to know you. And even more urgently, someone who can professionalize your fundraising operation on a full-time basis so that you can build up your war chest as quickly as possible and have a shot at signaling to party higher-ups that you’re someone to take seriously and invest in.

Your worth as a candidate shouldn’t be judged this way. But it will be. And so, if you want a chance to win, you’ve got to play the game. Which means, right now, getting on the phone and calling every single person you know.

## **Start Fundraising: The “Rolodex” and Beyond**

If you’re a new candidate, every training program and every consultant will tell you the same thing about starting your fundraising efforts: you’ve got to “go through your Rolodex,” or start “Rolodexing.”

What they mean, in twenty-first century vernacular, is going through all your phone and email contacts, reaching out to everyone, informing them of your decision to run for office, and asking for their support. “Support” could, down the line, mean a whole variety of things — volunteering at a phone or text bank, canvassing, or the promise of a vote, if you’re speaking with someone in your district. But at the start of your campaign, it means money. And the assumption that the people in your digital Rolodex *have* money reflects the age-old expectation that the only kinds of people who are qualified to run for office are those who have friends and family and colleagues with enough excess money lying around that they can happily put thousands into your campaign.

If you’re not that kind of person — as 99% of us are not — there’s no way that, by simply working your personal contacts, you’re going to raise the \$250,000 in your first fundraising quarter that the important people in Washington typically want to see in order to

consider a candidate “viable.” You may not even raise the \$100,00 or so that our candidates have been told they need to raise right off the bat just to have party bigwigs answer their calls. And what that means is that candidates who *need the most up-front help* end up missing out on a whole slew of early introductions, meet-and-greets, and endorsements that would make all the difference in getting their fundraising operation off the ground.

The chicken-and-egg aspect of this — that party leaders and top donors won’t give you their support unless you hit their highly ambitious fundraising numbers, but you can’t hit those numbers without their support — is beyond frustrating. And it sends the message to a huge swath of the population who really *should* be running for office that they’re not welcome.

## **A Heads-Up About Endorsements**

The endorsement process — at least for Congress — tends to be very long, and it’s often quite arduous, involving many introductions, many conversations, and many, many questionnaires. This early on in your campaign, it’s highly unlikely that you’ll get many, if any, set-in-stone endorsements at all. But you need to get started, so that you’re ready to play the long game. While EMILY’s List (for pro-choice Democratic women) and the Democratic Congressional Campaign Committee (the DCCC, the party’s arm overseeing Congressional races) are the best-known and most sought-after, they are also the hardest to get, especially this early on.

Be sure to research and seek endorsements from groups that exist for the express purpose of getting people with your background and lived experience into elected office: Organizations like VoteVets, which endorses young Democratic veterans, or Higher Heights for America and the Collective PAC, which endorse Black candidates; or Voto Latino; or us, Square One. If you self-identify as a progressive, you can look to the PACs tied to the Congressional Progressive Caucus or the Working Families Party or Justice Democrats. And then there are the PACs tied to advocacy groups such as former Congresswoman Gabby Giffords’ PAC or the Everytown for Gun Safety Action Fund, or the Sierra Club PAC. Not to mention the PACs run by high-profile members of the House and the Senate; Kirsten Gillibrand’s PAC, Off the Sidelines, specifically endorses female candidates running for Congress, and has been very helpful early on to a number of the women we’ve worked with.

The PACs mentioned here are, of course, just a start. Finding all the opportunities to apply for the endorsements open to you requires time and, when it comes to the most ambitious asks, the right introductions. Which is why, as soon as possible, you’ll need to hire someone savvy to help you get connected. And for state and local candidates, you may want to seek endorsements from state-specific organizations or national organizations that focus on your specific type of race, like state legislative or school board races.

In the short term, though, if you’re not independently wealthy or a tech billionaire or a celebrity; if you grew up in public housing, and are running for office in a low-income area; if you haven’t spent your adult life making monied friends and cultivating your “social capital,” what do you do?

You do like our candidates. You work the connections you've got. And then you build out your networks. You learn, you adapt, you change tactics and you hustle. In other words, you work hard and you *get creative*.

Liuba Grechen Shirley didn't come from money: She was raised by a single mother who was still, at the time of her campaign, working as a public school teacher. She didn't make a ton of money through her nonprofit consulting work, and she didn't tend to have rich friends. And so, early on in her campaign, when established organizations told her she'd have to have \$100,000 in the bank before anyone would take her seriously or even talk to her, it came as a massive shock. Fortunately, she's someone who does well under pressure.

"I sat down and I wrote this ridiculous Excel document that was color coordinated of every person I've ever known in my entire life," she told us in the summer of 2020. "And I just started to crawl through it. I called *everyone*."

Her daughter Mila was three and had just started part-time pre-school. Every morning, after dropping her off, Grechen Shirley would put her one-year-old, Nicholas, in his stroller and start walking, and then keep walking, for two and a half straight hours, because she knew that if she did so, he'd stay asleep and she could make her fundraising calls. After preschool, she'd pick up Mila, head home, and do more calls while making lunch. And then, after lunch, she'd nurse Nicholas, continuing her calls with a headset, while Mila gave her a "makeover." At 3:30, her mother would take over with the kids, and Grechen Shirley would start dialing for dollars again.

"It was thousands and thousands of calls," she recalled. "And it was brutal. And I raised \$126,000 in two months."

Lauren Underwood, too, when quoted the same \$100,000 number by that same organization, pulled out all the stops to make it happen. But her first "quarter" amounted to only seven weeks, due to the timing of when she officially launched her campaign. Through a combination of online crowdsourced funding, the Democracy Engine PAC, Senator Kirsten Gillibrand's Off the Sidelines PAC, her family members, friends, her wider personal network, plus a couple thousand dollars of her own money — often in the form of "in-kind" donations for office supplies, travel, and the like — she managed to raise \$75,000. "We were ecstatic," her first campaign manager, Sarah Feldmann, told us recently.

We introduced her to some people — donors who we thought would be impressed with her and would come away inspired. They were and did, and so they introduced her to some more people who were also impressed and inspired. Soon a lot of people had decided that they didn't care what the folks in DC said; they were all in. Those people then got in touch with still more people and told them, "*this* is someone to invest in."

When 2018 began, her campaign had raised almost \$200,000 in just two months. Someone mentioned her name to a *Time* Magazine journalist, who was writing a piece on the surge of female candidates running for office one year after the first Women's March. It ran as a cover story — headlined "The New Avengers" — with Lauren Underwood's face front and center.

After that, her campaign's fundraising skyrocketed. She raised almost \$275,000 in March alone. And then, having won her primary with more votes than all the other candidates (six white men) combined, she raised more than half a million dollars in the next quarter. She raised more than \$2 million over the summer and early fall. She ended the 2018 election cycle having raised just over \$4.9 million in all — and, of course, en route to Congress.

The moral of the above story is: If the money isn't there, you'll have to go out and find it. And with the right effort and well-targeted focus, you just might find more than you ever could have thought possible.

There are a lot of people around the country now — big donors and small — who really want to change the face of our government. They're increasingly coming together online and amplifying their giving potential through strength in numbers. And they tend to be quite passionate in their beliefs. "There is substantial energy among activists and donors currently to elect leaders from historically underrepresented groups. To achieve a truly representative and reflective democracy, we need to maintain and even increase this enthusiasm," Sarah Rowen, Liuba Grechen Shirley's former deputy finance director, put it to us during the 2020 elections.

You can't, however, find your people and tap into their networks all alone. You don't need to hire a professional fundraiser — and shouldn't — early on (unless you've raised enough money for a first salary), but you are going to need the help of at least one fundraising-savvy person, starting off, who *really gets* you and your campaign — and also is positioned to know the kinds of people in the kinds of places (San Francisco, New York, Los Angeles, and other centers of wealth) who have the means and the inclination to open their checkbooks and get behind you. Eventually, you'll need people from outside your district who can act as mentors and shepherd you into fundraising circles in other communities. People who can act as your initial "finance committee" and keep expanding your horizons beyond your own connections' connections.

You also can — and really should — no matter what you've raised, reach out to those big, DC-based organizations (the DCCC, EMILY's List, and so on) that give big amounts of money and confer endorsements, and ask again for a few minutes of their time by phone. You *won't* be asking them for their endorsement — you're unlikely to get it at this point — but you can ask for advice and for referrals to other groups that can give more advice. You should also ask if they wouldn't mind perhaps introducing you to a handful of donors who they think would be particularly interested in your campaign. The worst thing they can do is say no.

The central question you need to ask yourself while brainstorming for potential donors is: who is a person who would be attracted to *my* profile as a candidate? If you don't know, you'll have to dig. Do your research on potential donors. Know the issues they care about. Find out what are the proper channels to approach them; for many of the biggest donors, it may be through their donor advisor. That's why you need mentors and ambassadors who know people who know people: if you don't already have a lot of contacts, it can be really hard to find your way in.

You'll find, more often than not, that — no matter what they may say at first — people love to be asked for help. In fact, we've seen that some people actually get a bit offended if

they *don't* get a call. Most of the potential donors you're going to call over the course of your campaign will be people you've never met, but whose names have come your way because they've reliably funded Democrats in the past. They're people who believe in good causes and will know, from the people who connected you, that there's good reason to invest in you. They like giving, because it's a way they know they can make a difference. So if they seem reluctant when they pick up the phone, or tell you they're not sure because they've already committed to so many other people, don't let yourself be deterred. Stay friendly and energetic and grateful, tell your story, and just be you.

If you have a bad call, take a quick break, and then bounce back and keep going — “fail fast and learn from it,” as Miti likes to say. Remind yourself that raising money is what you *have* to do in order to be able to do the work you *want* to do for the *people you want to help* in your community. Remember that it's a process — and it's not personal. Don't be afraid to be persistent. The point at which asking actually becomes obnoxious tends to be far beyond where you'd think.

## **Ready, Set, Launch!**

Once you have some money and at least one really solid helper, you can think about your official launch. It doesn't have to be a big deal. And it certainly shouldn't be expensive. What we almost always recommend is launching online, with a 90-second video that's posted widely on social media. In that video, you'll tell a boiled-down version of your story against a backdrop of images that convey both where you come from and why you're the best advocate for the people in your district. It needs to be thoughtful and inspiring. But it doesn't have to be fancy.

A number of our candidates have written their first video themselves and recruited friends to shoot it. We helped produce Liuba Grechen Shirley's video in her home, taking turns playing tea party with her children and their dolls, our knees crammed under their tiny table, while the video was shot. She also wanted to do an in-person event, but had little if any campaign cash to put into it. So we helped set her up in a backyard and invited family and friends. Our candidate stood before them in a comfortable yet professional-looking blue dress, and with her three-year-old daughter, Mila, gripping her hand, she presented herself exactly as she was: a smart, well-informed, politically engaged mother of young children with a strong background in foundation management and a particular expertise in healthcare and work-family policy.

She brought a speech with her — an early draft of the initial campaign speech that would eventually be honed and updated and road-tested into her stump speech — but quickly abandoned it, losing her place as Mila began pacing in tight circles around her knees. She spoke extemporaneously about where she was from and why she was running and what mattered the most to her. Her voice broke slightly as she came to the words, “So I am running for Congress,” and the small crowd cheered her on. And, just like that, she was off to the races.



## Step 4: Staffing

“I launched my campaign at the end of October, and I didn’t hire a campaign manager until January. There were many times during the first few months when I wanted to quit. Getting everything set up, figuring out what needed to be filed, how to find a lawyer, how to find a compliance firm and a treasurer, how to file your paperwork, how to hire staff — with two babies at home full-time — it was just so overwhelming. And once all of that was taken care of, and I had hired a campaign manager and raised enough money to hire staff, then I got to the good part. Once you get to the part where you get to talk policy, that’s when campaigning gets to be fun.”

*Liuba Grechen Shirley, 2018 candidate, New York 2<sup>nd</sup>*

There’s going to come a point, not far past your official launch, when you’ll find you can no longer just get by with a little (really, a lot) of help from your family and friends. And so, just as soon as you’ve raised enough money to cover a salary, you’ll need to hire your first staffer. That choice will be one of the most consequential decisions you’ll make throughout your campaign. So let’s go over what you need to do to get it right.

Launching your campaign will be empowering and exhilarating. But then, the hard part begins. As your run for Congress becomes a reality visible to more and more people, you’ll suddenly be heading an enterprise in which, no matter how many people you have behind you, all responsibility eventually pools at your feet. You’ll undergo a level of scrutiny that you never thought possible — and so will your family. You’ll have to run one, maybe two (maybe more) offices — a task that requires a set of skills that you’ve probably never had to

use before. And when you're out meeting voters and donors, you'll be largely on your own. Stumbling, hopefully not falling too hard, picking up the pieces at the end of each day, and getting ready to start up again the next.

There's going to be a *very steep* learning curve. Don't be surprised if you feel you're kind of awful at first. You'll be nervous. ("It took me about six months to be able to say 'I'm running for Congress' without breaking into a cold sweat," Kim Nelson, our candidate for the South Carolina 4<sup>th</sup> in 2020 once told us.) Campaigning doesn't come naturally. It's not always a whole lot of fun — though it often is; in fact, words can't describe the thrill when everything comes together and you really start to connect with voters.

Our candidates — probably because they are the kinds of people who have dealt with hard work and struggle in their lives before — are quick studies. We've been amazed to see how fast they've progressed from their first nervous, halting speech to standing in front of dozens of news cameras a year later. They don't do it all on their own, however. They hire great staff.

## Your First Hire

The number one, most important thing we tell each and every one of our candidates about early hiring is this: If you're a newcomer, running as an insurgent without a lot of money behind you, **you should have no more than one person on your payroll in the first month of your campaign.** And, if necessary, even longer.

That's tough advice to follow. At the start of your campaign — and right through to the end — you'll probably always want and need more staff, because the volume of work will be so overwhelming. In addition, just as soon as you announce your candidacy, all sorts of people will start coming out of the woodwork to try to sell you all sorts of services — mail consulting, media consulting, digital consulting, television consulting. You'll be told that, if you don't hire this or that or the other person you won't be able to function. You'll be told that, on top of all these specialized people, you'll need a "general consultant," who, like a general contractor, can help with your overall campaign plan. You'll be told that you have to sign contracts and start paying for these services right away, before other campaigns snap the consultants up.

*Don't believe it.* In the first few months of your campaign, you need one good person from your life whom you trust, and you need a finance director or a campaign manager who, in either case, can perform the duties of the other job until you can afford to hire a second person. And that's it. (And anybody who asks you to sign a long-term contract in the beginning stage of your campaign is trying to take you for a ride. Any reputable campaign consultant is going to scale up their fees as you raise more money. Very often, they'll offer the first month or so for free. Because, if they truly know the business and have your best interests at heart, they'll know that you need to be spending all your time and resources in those early days on raising money — and that the kind of strategic advice they have to offer on campaigning isn't yet going to be of much use.)

You don't want to see your expenses spiral out of control, end up laying people off or going deep into personal debt. Over-hiring will push the pressure on you to fundraise through the roof. And once you get bloated, it becomes very, very hard to slim down.

There's no more surefire way to sink a nascent campaign than by loading it up with salaries to pay early on. We've seen it first-hand. In 2020, one of our candidates — a young, energetic and super-smart woman, running for Congress in a deep red district where no Democrat had seriously competed in decades — almost had to quit for just that reason. She had done a training program and had come away with some good knowledge, but also some very unrealistic goals around fundraising and staffing, which were predicated upon her having access, via her "Rolodex," to people who'd help her get into six-digit territory in her first couple of months. For her first hire, she'd chosen a recent college graduate who was extremely well-meaning but had no experience in campaign management and budgeting. Right off the bat, that young woman had brought on a political director and a digital strategist, and had retained the services of a very expensive DC-based fundraising consultant who was known to be very good, but also was utterly unused to working with a non-monied newcomer in a district where the median household income was less than \$40,000.

By the time the candidate hired a professional campaign manager — a young woman who had spent a few years working her way up the hierarchy in a series of long-shot races — the campaign was nearly \$5,000 in debt. The campaign manager had to call up two donors and ask for a quick infusion of cash just to pay the candidate's filing fee. Soon after, with less than \$500 in her campaign account, the candidate had to face a tough decision: scale her expenses way, way down, or quit.

She chose to stay in. She got rid of the political director and the digital strategist. She downgraded the original staffer to running events, and greatly cut her hours. She stopped using the expensive fundraising consultant and gave his duties to an energetic young man who was only half-way through college but had taken a year of leave and was willing to work for next to nothing. He had extensive campaign experience from summer internships and, unlike the candidate, was a web native; soon, in addition to fundraising, he was charged with the campaign's digital operations as well. He and the campaign manager became a (low) paid team of two — overseeing a "staff" of 12 high school and college interns and a volunteer field director. By the summer of 2020, they were six months out from the point when it looked like their candidate might have to withdraw. They'd just had their best fundraising quarter ever — despite all the limitations posed by Covid. And their candidate went on to raise more money than any Democrat running for that seat ever had before.

*How will you know when and who to hire?* The "when" is easy — just as soon as you've raised enough money to cover a first salary. As for the who: someone who can take your fundraising to the next level *and* who will free you up administratively so that you'll have the time and mental space to get out and start talking to voters. This person can either be your campaign manager or — very likely, since you're a first-timer — your **finance director**, who, when you're able to scale up further, will ultimately occupy the number two place on your staff, reporting to the **campaign manager**, who will report directly to you. Note, these are our



recommendations for Congressional races, but in a smaller race you may only need a campaign manager.

Hiring a finance director before the person who will ultimately be their boss may seem as illogical as filing FEC Form 2 before Form 1. The reason candidates often do it this way is that finance directors handle fundraising, and money is so crucial in getting a campaign off the ground. So instead of first hiring their highest-ranking people, they hire in order of urgency of need.

To be good at their job, the person in charge of your fundraising doesn't necessarily have to come out of the political campaign world — though if this is your first campaign, it's probably better if they do have at least one cycle of experience as a finance assistant or a deputy finance director on a political campaign behind them. They need to know how to make and maintain contact with donors, cultivate new avenues for raising money, keep track of who has given what and when, and have the organizational skills to maintain records in such a way that your compliance firm will be able to do its job. They also, if they're your first hire, need to know the basics of managing a campaign, which in the early stages means working with you to set strategy for connecting and communicating with voters, honing your message, and making decisions about how you'll budget your time and money.

Later on, if you have the money to hire more staff, these jobs will become more complex, especially when it comes to management skills. Your finance director may oversee a **deputy** and/or a **finance assistant**. And your campaign manager will — again, if and when you have the money — hire and manage your outside consultants and additional staff. Those later staffers are likely to include a **communications director** — someone with good writing skills and media savvy, who will help craft and hone your message, draft your speeches, cultivate and manage relationships with reporters, put out press releases and oversee social media. You will hire a **field director**, who will be in charge of making sure that voters know who you are and hear your message. They'll identify who and where your likely voters are in your district, create a road map for bringing your message to them through local events, literature drops, parking lot meet-and-greets, phone calls, text banks, and other sorts of direct communication. Before your primary — and, hopefully, your general election — they'll oversee your get-out-the-vote (GOTV) efforts as well. And if your campaign gets big enough, the field director may also manage a paid staff who will implement various pieces of the overall field plan: a **field organizer**, a **volunteer organizer**, a **GOTV organizer**, etc.

For all this later hiring, the general rule will always be: start with the bare necessity of what you need — and be very honest with yourself about what “need” really means. The point at which you'll be justified in adding a second paid staffer — as with all subsequent hires — will be when, first, your fundraising is going well enough that you can afford another salary and, second, when you and your staff's level of overwork is so great that it's actually *costing* you money in missed opportunities. More concretely: if you've reached a point where you could be bringing in a lot more money if the person in charge of fundraising wasn't spending so much time on other things, then it'll be time to staff up.

Having said all of this, we want, once again, to urge caution. Campaigns operate at breakneck speed, and every new challenge feels like a five-alarm fire. Your early hires, however, are likely to be the most important decisions you'll make over the course of your entire campaign.

**So don't rush the process.** You *have* to hire the right people — and the right **campaign manager** above all. And that's because the position is one with almost no limits. Your campaign manager will be the person responsible for helping you figure out all the most essential elements of your race — from how much time to spend on fundraising to how you write and edit your speeches to where and when you travel, who you meet, and whether and to whom you grant interviews. They'll be responsible for choosing what other staffers you eventually hire and for managing them, your consultants and vendors, and your all-important volunteers — essentially translating your ideals and your vision into your campaign office culture. At the same time, they'll be giving you essential guidance and feedback on how you dress and manage your image. They'll be in charge of your schedule, essentially managing what (and whether) you eat, and when and where you sleep, and making sure you're on time for planes, trains and appointments. They'll keep you hydrated and caffeinated (if needed). And they'll pretty much be with you from the moment you wake up until the moment you put your head down on the pillow at night.

Overall, they'll serve as a combination of colleague, porter, office spouse, nag, employee and best friend — which means they've got to be someone you trust unreservedly to have your back. Someone — and this is crucial — who is *outside of your circle of friends and family* who can support you at your best moments and also at your worst, listen to you as you unload and complain; someone you can be completely honest with — even disagree and be angry with — without fear of negative repercussions. Someone who will listen. Someone — as one of our candidates once put it — who will always make you “feel heard.” Someone who will always make you feel like you're a real human being, and not just a high-performing, charm-oozing, money-generating machine. And someone who will do all this — for the most part — with grace and good humor.

“You kind of do whatever you have to make them find the time for what they have to do and feel comfortable doing it,” is how Clara Sandrin, who managed Kim Nelson's campaign for the South Carolina 4<sup>th</sup> in 2020 described her job to us, recalling the period, pre-pandemic, when she spent three hours a day in Nelson's house, keeping the candidate's kids busy so that she could focus on the task at hand. “We were all kind of in this together,” Nelson later recalled. “There was no ego. It was one team, one fight.”

## Finding Great People

“I love campaigns because you can have as much responsibility and control over things as you want to take on. I have never felt like I've known what I am doing. It's a fake it 'til you make it profession. And once we realize that no one knows exactly what they are doing and no one is sure of anything, it's a very liberating perspective. It's a ton of work, but also a ton of opportunity.”

*Anna Brichacek, campaign manager for Liuba Grechen Shirley, 2018; Ohio state director for Elizabeth Warren, 2020.*

The usual way to start looking for campaign staffers is by asking the party — both local and national — for recommendations. In fact, if yours was a typical, high-profile, big-money campaign, resumes would flow your way the minute you started testing the waters. You'd get staffers with all sorts of prior campaign experience, a good familiarity with the party powers in DC, and a “Rolodex” of their own to cultivate for political donations. But the kinds of people who are already well-known to the party may not want to take on a long-shot, low-budget race. And, frankly, you may well be better off without them.

Highly experienced staffers who are used to working on mainstream campaigns will have come up in a system that's essentially all about maintaining the status quo. They'll likely think and operate like insiders. They're more likely to be white and middle or upper middle class, and disproportionately male. And likely many of the candidates they'll have worked with in the past will have fit that profile as well.

If you're like our candidates, you're going to need something very different. If you're a person of color, you're going to need people who know how to dress you, light you for a video shoot (if you're darker-complexioned and you're backlit, you'll essentially disappear), and be sensitive to the issues that people of color face on the campaign trail. You'll need to work with people whose whole goal is to capture and convey *the real you*, even if — as with all candidates — that means aiming for a slightly more polished and camera-ready version of you. What you don't want is to pay someone who's going to convince you that you need to look and sound “more professional,” by which, consciously or not, they really mean “more white.” This means finding people who either share your lived experience, have worked with other candidates like you, or have the mental flexibility, openness and humility to acknowledge what they don't know, listen well, and learn fast.

If your campaign doesn't have much money, you're going to need people who can be flexible and creative in coming up with budget-friendly ways to connect with voters. You'll need people who can think outside the box, take risks on new ideas and strategies, and recover fast if they fail. They can't be fussy about what they eat or where they sleep. And — as on all campaigns — they need to be high-energy and high-capacity, people who can keep thinking clearly and turning out really good work even when they're exhausted.

The ideal potential staffer is going to be someone who will see working with a candidate like you as a fantastic opportunity, even if they have worked on campaigns before. They will love the fact that you'll have no entrenched way of doing things — and so they'll

have something close to free reign for their ideas and inclinations. They'll be in on the ground floor from the very start and will have a degree of freedom and responsibility they'd have to wait years to gain otherwise. There will be little, besides common sense and campaign finance law, to limit their imagination and creativity. So many of the successful staffers we've spoken with have joyfully remembered this, when they described their first big break in being hired to work on a campaign: "I didn't know *exactly* what I was doing, but I figured it out." This is truly what you need: someone with the drive, tenacity, and quick-learning capacity to help *you* figure things out too.

**To find these kinds of people, you yourself are going to have to think outside of the box.** You can start out by trying the conventional route. But don't over-invest in it, and don't lose time. First hires are often serendipitous: A friend knows a friend knows a friend. A family member knows someone who does a lot of political volunteering. That person met someone who has a son or daughter — perhaps still in college but loaded with campaign internship experiences stretching back to high school — who is now looking for a paid campaign job. We've seen situations where the first friend a candidate relied on for help as a sounding board turns out to be someone they want to move into a more formal campaign role. Or a neighbor down the street who early on offered to volunteer turned out to be really competent both with fundraising and record-keeping.

**Keep an open mind.** Remember, too, there's another good thing about all that calling and visiting and digging you did while "testing the waters": at least some of the people you spoke with are just the type to know other people who do good campaign work. You're going to want to go back to the folks you first talked with to thank them for their help and let them know you've decided to run, so you might as well take the opportunity at that point to ask if they have any names they might want to share. There may be people you came upon while "Rolodexing" who have ideas too — or who might just offer to volunteer for you, as needed. If the offer is genuine, and they have skills your campaign needs, then look into finding a place for them.

**Be as creative as you want your staff to be.** When you go looking for staffers, don't just limit yourself to Democratic organizations that have job listings for campaign personnel. Look at online job boards like Angellist and LinkedIn. In addition, in recent years, there's been real innovation in the non-profit world by people who are really committed to bringing new blood into our political landscape. Arena and GAIN Power in particular now have great online job boards to connect diverse candidates, staffers and progressive organizations. GAIN Power, like Arena, also does in-person (and online) training events, which are a great place to network.

When you write up your job descriptions, we'd suggest emphasizing the basic underlying skills and qualities that we've listed above, rather than focusing on specific campaign experience. Widening your search in this way will bring you a much broader — and better — range of job applicants. We know from experience that there are a lot of talented people out there who would love to work on a political campaign, but don't think they're qualified to do it, despite really having all the basic skills they need.

**When you interview people, be sure to apply that same kind of broad-mindedness.** Do your reference checks, of course. Make sure you're comfortable with someone's level of skill. But don't be super-rigid on specific campaign experience. Don't get seduced by fancy schools or fancy references or the perfect-sounding buzzwords. And *don't* make the mistake of listening to people who tell you you've got to hire the "best" DC insider. You're looking for a person with whom you're going to spend just about every waking moment, and so you've got to have great rapport. You don't want to end up with someone who checked all the boxes resumé-wise but isn't a person you'd want to be around.

We'd urge you to be skeptical as well if you hear too much fancy talk about technology. We love data — and we know first-hand all the good that the newest and best technology can do. But we've also seen that if you don't have the right staffers making decisions about what tech to use, and you don't have the right people trained on the ground to make use of it, even the best tech platforms aren't worth a hill of beans. Tech can't be a campaign's be-all-and-end-all. Every district is different, just like every candidate. What works wonders in one race isn't guaranteed to be a magic bullet in another. And all the data and technology in the world just can't elect a candidate that people aren't excited about.

Campaign work is so unique that you can't bring a traditional hiring mindset to your meetings with applicants. People who seek out campaign jobs tend to do so because they're idealists and want to be part of a concrete push for change. But those who thrive in them — and, very often, get hooked on campaign work — do so because they find the day-to-day reality so appealing. They like the physical camaraderie of working long hours in small spaces with like-minded people who become their family. They love the thrill and the intensity, both emotional and intellectual.

That's not a skill or exact personal quality — it's a way of being. And it's the kind of thing that is impossible to discern from a resume, particularly if you're considering someone who hasn't worked on campaigns before. That's why, *when it comes to sizing up applicants, do your due diligence, and then go with your gut.*

It's tough, of course, to get a real deep gut sense of someone during the hiring process, especially on the sped-up, high-pressure timeline of a political campaign. But there are some things you can do to make the time you do have with applicants as productive and telling as possible:

**Ask job candidates the same kinds of open-ended questions you had to ask yourself early on.** In particular, ask why they've been drawn to campaign work and what — if they've done it in the past — they most like about it. And make sure that they are, in fact, drawn to you as a candidate, and not just to the job you have on offer: ask why they *specifically* want to work on *your* campaign.

Feel them out on how they make decisions, who they turn to for strategic advice, what they consider to be their greatest successes (and failures) in the past, and what they learned from them. If you can, try to spend time with them outside of your office — going to lunch, driving around, maybe even meeting a few people in your community, so you can get a sense of what they're like in real life, in real time, outside of the bubble of an interview. If you

can see them interacting with voters, you'll get a sense of how they speak to people who aren't their bosses — which can speak worlds about their values.

**One final thought on early staffing:** *Once you start working with professional staff, don't ditch the special people who have stood by you thus far.* If a trusted friend has been doing all your support work from the start and wants to continue, on-boarding your first paid staffer can be very awkward. If that's the case, you're the one who's going to need to step in to finesse the transition. Our advice: if their help has been good thus far, if their presence has kept you sane and allowed you to be the best *you* that you can be, then find a way to keep them on, not necessarily in a leadership role when it comes to day-to-day operations, but with a title — perhaps as a “special advisor” — that acknowledges their value and status as a member of your inner circle.

If your early helper has been a family member, things can be tense yet when the pros come on board, especially if the family member in question is a parent. Parents are really tough to integrate into a professional team, and their presence can be particularly problematic if they're involved in staff hiring; after all, no one wants to take a job sensing that they'll be second-guessed by their boss's *mom*.

Parental overinvolvement is often tricky to avoid these days, because a lot of young candidates actually now live with their parents while they're campaigning. Some do it to save money, if they move back to the district they grew up in in order to run. Others — like so many Millennials generally — are simply marrying later, have been priced out of their housing market, or are paying down student loan debt.

Your best bet, if you're young and your parents still play a major role in your life, is: let them cook you dinner. Let them watch your children (if you have them). Let them do your laundry or drop off your dry-cleaning. But don't have them weigh in how you choose your campaign manager or make major strategy decisions. It just isn't fair to your staff.

## **Building Your Team**

If all goes well on your campaign and your fundraising really takes off, you'll have the opportunity to grow your team. At that point, you'll no longer be on your own when it comes to strategy around staffing, which is sure to be a relief. There are a number of areas, though, where you'll have to remain vigilant, no matter how great your first hires. One that has caught many of our candidates off guard is just how challenging “leaning in” to leadership in their own campaign offices can be.

It's not surprising. Most people, when they start a new job — even a first job — have trained for it for years: in their education, or internships or apprenticeships. When they begin, if the business is run adequately at all, there's someone on site to train them. And the job tends to have well-delineated duties, with a certain set of hours, and with colleagues to ask for help. When you're running for office, especially if you're the underdog doing all you can to raise money and gain name recognition, there are no set hours. Most of the time, there are no days off. And your duties, especially early on, can include just about *everything*.

In fact, running a campaign essentially means starting up a small business in which, at least at the very beginning, you will be playing all the principal roles. And then once you hire staff, you have to be their manager as well. The kinds of young candidates we generally work with, however, often don't have much management experience. Their campaign managers also tend to be young and may not have extensive experience at overseeing teams of people. As a result, the biggest problems we see, once campaigns start to really take off, are around management. We've dealt with those problems often enough that we have some very strong opinions on how you can set yourself up for success.

**Find a mentor.** If, like so many of our candidates, you're still developing your team-management skills, you should really consider finding a mentor — someone in politics or on the outside who has had solid success as a manager and is willing to help you. Young campaign managers should do this, too, because the pressures on them are intense, but with all the attention on the candidate — as it should be — nobody thinks to ask them how they're doing and feeling and whether they need help. Ideally, you'd find someone experienced in managing a team during a crisis — because campaigns, even when they're going well, function in perpetual crisis mode. Ideally, too, you'd get this help in place before you even launch, so you'd have someone on call with whom you could problem-solve in real time right from the start.

**Set boundaries.** Boundary issues are almost inevitable in the sort of intense, around the clock work environment that develops on the campaign trail. At the beginning, when you're working with just one paid staffer, you'll be peers, and your relationship will tend to be relatively uncomplicated, provided you get along well and are on the same page. Things will become a lot less simple once you staff up and you'll need to put a real hierarchy into place.

Our best advice for navigating this thorny area is to take a twofold approach. Early on, put formal policies in place that establish expected norms of behavior and procedural guidelines. You'll need to have some sort of standard hiring policy. You'll need a sexual harassment policy, as well as policies to promote equity and inclusion and protect against all forms of discrimination. (Your legal team or compliance firm can help you with all of these.) You'll need standard expectations for work hours, holidays and time off. And you'll need a remediation process if things go awry.

And then you'll need to have very conscious personal guidelines governing your own behavior, and to be very thoughtful about how you interact with your campaign staff. You'll have to make sure you view your staff as your *staff*, so that they will view you as their leader and the boss. Some of this will simply involve being intentional about how you spend your time: there's a difference between having dinner with your staff and going out drinking with them late at night.

**Learn to be the boss.** For young candidates and, unfortunately, for women of all ages, it can be really hard to put your foot down and *be the candidate* if you and your top staff have disagreements. It can be especially hard to stand your ground with someone you consider your peer — even your friend — particularly if you're entirely new to campaigning and they have a lot more experience. We see this all the time, and we always remind our candidates that, no matter what, their campaign is *their campaign*. It's their face on the campaign

posters. Their name on the ballot. And their authentic voice is the most valuable campaign asset that they have.

At the same time, however, a good boss — a good leader — has to listen to the people they pay to advise them. If you can't tolerate differences of opinion, you weaken yourself as a candidate. You also run the risk of creating a toxic work environment where staffers are motivated more by their desire to avoid getting on the wrong foot with the candidate than by pushing for big ideas and doing what's best.

**If problems arise, get out in front of them fast.** In any workplace there are tensions, and in the high-stress atmosphere of political campaigning, things can get very tense very fast. If your issues with a staffer reach a point where you no longer trust them or doubt their judgment, you have no choice but to take your feelings seriously. Ideally, though, you'll have some safeguards in place so that problems are dealt with before they snowball.

**Don't let the frenzied pace of campaigning get in the way of regular check-ins with your staff.** You'll need to have some system for checking in with your top staffers, both to provide the positive feedback that so often falls through the cracks when you're down in the weeds together day after day and also to deal with issues before they fester and get a whole lot worse. And your top staffers need to be checking in with those below them.

**Cultivate a climate of competence, not fear.** A climate of fear completely stifles the very entrepreneurship and creativity you'll need as an insurgent candidate. So don't let it take root. Make sure that lower-level staff in particular have an outlet to be heard. As an added benefit: they'll treat one another better and work harder on your behalf.

**Take care of your volunteers.** They may not be trained campaign professionals, but they're full of energy and idealism and good will — and you'll need all of that, in large quantities. In fact, if you're in a tough race in a large district, you're going to need hundreds of volunteers who will act as your ambassadors, sharing information with voters and answering their questions. Those volunteers are going to put long and exhausting hours in for you. So *please* treat them well.

Honor their intelligence and their commitment to your common cause. Make them feel like they're *really* part of the team. Give them information before they see it on the news. Have your campaign manager get on a call to speak to them directly, share observations and answer their questions. And if a special guest — like you, the candidate — can join the call too, even briefly, the good faith gesture will go a long way.

Make sure that everyone else on your paid staff treats your volunteers with the same respect that you do. In fact, we always tell our candidates that when they interview potential staffers, they should ask at least one question about how the prospective hire feels about campaign volunteers. The degree to which they appreciate their importance, and how much respect they convey, will speak volumes about what they value, on or off the campaign trail. And, as we always tell our candidates, no campaign can work well if absolutely everyone who's part of it doesn't share the same values.



## **Campaign Management Is Political**

Until very recently, the campaign world was a real “anything-goes” workplace atmosphere. You were expected to work 24/7 without a single break. You’d miss weddings and funerals and births — pretty much any major occasion that wasn’t directly related to serving your candidate. White-knuckling it through was a badge of honor. And sucking up situations that we’d now consider abusive was seen as what you had to do for the privilege of working in politics. Unsurprisingly, there was a lot of inappropriate, nasty, and downright cruel behavior that came along with this: sexual harassment, bullying, discrimination of all kinds, a basic lack of respectful treatment for lower-level staffers, or who were generally vulnerable in ways that could be exploited, often covertly.

Thanks in large part to the #MeToo movement, expectations around campaign culture have changed. There’s a vocabulary for calling out abusive behavior, and a willingness to both hear and do something about it. There’s more emphasis on paying staffers a living wage and on allowing them to maintain a decent quality of life. There’s also a recognition of the fact that longer hours do not equal greater productivity.

In other words, the culture of Democratic campaign workplaces is finally catching up to the party’s stated politics. We’ve still got a long way to go, of course, and we want to conclude this section with a last piece of advice that is both super-important strategically and as a philosophical imperative. We’re separating it from all the rest because it represents a still-unmet challenge we need urgently to address.

Make absolutely sure that the people you hire, including in senior strategy positions, reflect the full diversity of your district and your ideals. We’re talking about diversity as defined in every possible way: socio-economic, racial and ethnic, gender, linguistic, religious, by sexual orientation and by age.

If you live in a diverse district, it’s beyond crucial for your campaign to have the knowledge and cultural sensitivity that will allow you to truly speak the language(s) of your voters, recognize their needs and hear what they say. You’re going to need people from many different communities to invest in you — and you owe it to them to invest back, by making concrete steps to bring them along with you.

Ask for volunteers in communities where people feel overlooked by their politicians and in neighborhoods where newcomers feel uncertain about their place in the U.S., and quite possibly unwelcome. Make clear that you’re as interested in bringing their voices into your campaign as you are in sending them back out into their neighborhoods with lawn signs. Try to recruit staff or interns from these communities, too. And make sure that your whole staff is educated, to the greatest degree possible, in best practices for appropriate modes of outreach to different groups of people.

Doing this work isn’t just the right thing to do; it’s the necessary thing to do if you want to get elected in a very diverse district. It helps set you up to make the most of all possible opportunities for getting in front of voters and connecting with them authentically and respectfully. It’s how you’ll be aware of holidays, periods of celebration, and mourning or fasting, days when your outreach may be more — or far less — welcome. It’s how you avoid

the offense of showing up, uninvited, at a mosque during Ramadan and handing out campaign literature that asks worshippers for money. It's how you prove you're not playing the same-old game as the usual white politicians who discover Black churches two weeks before election day.

It's also how you guard against some of the mistakes made by election forecasters, particularly in 2016 and 2020, who made huge errors by over-focusing on certain segments of the population and making false assumptions about others. Some of the biggest election "shocks" of 2020 came, for example, when pollsters lumped all Spanish-speaking people into one voting category, overlooking the important role that country of family origin would play in how different Latinx voters reacted to attack ads about "radical socialism" — and also ignoring that those voters were deeply divided on the subject of immigration itself.

Having a genuinely diverse staff will also set you up to make the most of your fundraising. Because if your staffers are members of historically underrepresented groups, they are more likely to be able to connect directly with like-minded people who can support you. Fraternity or sorority groups from historically black colleges, for example. National LGBTQ support groups. And those national networks can make a huge difference in helping to drum up support for your campaign.

And now, with all of that covered, let's get you out of the office and onto the campaign trail.



## Step 5: Getting Out There

“An effective campaign is being on the ground, boots on the ground, engaging with your communities. Going to the parts of the district where people feel left out, where people feel like their voice is not being heard. It’s not about the yard sign. It’s not about the buttons. It’s not about the things that you try to sell online. It’s about one-on-one relationship building. Letting people know what’s important to you and what you believe in. It might be old-fashioned, but it works great.”

*Congresswoman Lucy McBath, Georgia 6<sup>th</sup>*

*If you want people to vote for you, they have to know who you are. For that to happen, you’ve got to get out into the community. That means meeting voters where they are, and learning what’s on their minds, so that you can really and truly be able to speak their language.*

We will stake our reputations on this: There is nothing that replicates retail politics. No ad, no event, no media coverage can compete with the vote-building power of showing up anywhere and everywhere people in your district tend to congregate *and talking to them*. In the months to come, that’s where you have to be: in shopping centers on the weekend, at county fairs, at farmer’s markets; local sports events, PTA meetings, Fourth of July parades,

church cookouts, firehouse fundraisers, fall festivals, tree lightings, fish fries, flea markets, holiday markets, pancake breakfasts, outdoor concerts, county board meetings. Football games, graduations, the opening of a new senior center. Your local Women’s March. Any parade or holiday that seems appropriate.

Whenever you meet people in these situations, you’ll need to introduce yourself, shake hands (if it’s safe, of course), say you’re running for Congress (or whichever office you’re running for), and make small talk — in the course of which you’ll listen to them, and try to get a sense of what’s on their minds and give them a sense of what’s on yours. You should have someone with you gathering names and email addresses and handing out flyers for upcoming campaign events along with some very basic campaign literature that has a short version of your bio, a list of your policy priorities and — just as important — how to support your campaign.

You can’t count on getting the media to do any of this work for you. You almost definitely are *not* going to get reporters to cover your campaign (“earned media” as people say in politics) so early on. You also, early in your campaign, should *not* be spending your precious campaign dollars on “paid media” (advertising) whether on the radio or TV or via the newest and sparkliest form of online campaign advertising.

The sparkle won’t serve you just yet. You need first to build up name recognition. And if you’re not in front of voters – interacting with them in old-fashioned, face-to-face ways, you’re never going to build the momentum you need to win. Showing up for voters is important in all political races, but particularly in elections for the United States House of Representatives, where people really do expect those they vote for to, well, *represent* them. And we know from years of experience that TV is not an effective means of voter contact — at least not until the later stages for a Congressional campaign. It’s particularly ineffective early on for candidates of color, who are not well-served by voters first encountering them via TV or small screens. That’s because when voters encounter a Black or brown candidate for the first time on screen, it activates all their conscious and unconscious racial biases. It also fixes the candidate in voters’ minds as “the Black [or Latinx or Asian] candidate.” If they meet the candidate for the first time in person, however, they’re more likely to simply view them as “the candidate.”

We feel so strongly about this that we’ll repeat it: no matter how many times people tell you that you *need* to pay for ads in your early months, because “everyone knows” that it’s the way to win elections, *don’t listen*. If you don’t get in front of voters and meet them where they are, you’ll never have a chance. And while there are many ways to meet voters where they are, the single most impactful way is by canvassing — knocking on doors.

## **Finding Voters**

Going out to meet your voters is a whole lot easier if you know who they are and where to find them. The place to start is your district’s voter list.

Every state’s board of elections compiles and maintains a state-wide voter registration database, which usually includes registered voters’ names, addresses and phone numbers,

plus information indicating whether or not they showed up to vote in prior elections. In some states, you can access that database directly; in most, you cannot. In the latter case, the way that candidates typically get the information is through the state Democratic Party, for a fee.

You'll use your voter list both to find out where your likely voters live and also to help figure out how and where to find the votes you'll need in order to win. If you're running in a very tight race, as our candidates do, then your ability to ultimately win in your general election is going to come down to how you perform among a very specific number of voters. You'll figure out that number early on when you're researching the district by finding out, based on voting records, how many voting-age and voting-eligible people there are in the district, how many consistently vote Republican and how many consistently vote Democratic, and how big the pool of people left over is. Those people — the district residents who fill the “gap” between reliable Republican and reliable Democratic voters — constitute your “persuasion universe.” You'll need to get a majority of them to vote for you in order to win your district.

What you believe is the best way to win over those voters will determine your campaign strategy. You can put your energy into trying to convince moderate swing voters. You can raise your vote totals by inspiring “latent” voters — registered Democrats and Independents who haven't been motivated enough to vote in recent elections. And you can expand your electorate by registering new voters.

Which road you take is partly determined by political philosophy and partly based on informed judgments of who you believe the people in your “persuasion universe” to be. In Lauren Underwood's 2018 race, for example, there wasn't so much a need to register more voters in the district as there was to reach the larger numbers of Independent voters who had been sitting out recent Congressional elections. For Lucy McBath that same year, however, increased voter registration made an enormous difference.

Making those informed decisions, however, can be very complicated. For one thing, you have to be careful when you create your projections of who's likely to vote based on voter performance in past elections: turnout numbers can vary a great deal depending on whether you're looking at a presidential election year (much higher turnout) or a midterm or off-year election, whether there was a compelling candidate on the party ballot, and even the weather on election day.

## **Connecting in the Field**

Once you have the information you need to find your voters, you can start canvassing. As the candidate, you'll obviously be the most important person to go door to door. But one person can't knock on every door in a whole district. Eventually, you're going to have staffers and volunteers doing it as well. You'll need a field operation — first to bring your name and campaign literature to people's doors, then to answer their questions, invite them to events and seek their engagement, and then to get out the vote for your primary and — if you win your primary — the general election. If your fundraising goes well, you'll hire a field director for this and eventually — if you can afford it — a field staff. Early on, though, it'll be on you

and your campaign manager to devise ways to make the most impactful connections with the greatest possible number of people in the most efficient manner. And that will mean, as with fundraising, being really, really smart about building and mobilizing your personal networks — and then getting everybody in those networks to do the same.

One of the best ways to do this is to get your friends and supporters — preferably people who know you pretty well and who have a sizeable network of contacts — to host house parties: casual gatherings in their homes where you'll mix and mingle, give a quick and easy version of your evolving campaign stump speech, talk about your life and your vision, and, of course, ask for money. These house parties don't have to be any particular size, or to happen at any special time of day, and they certainly don't need to be anything fancy. What they should be is warm and friendly, small enough to allow for real back-and-forth conversation, unintimidating and fun.

You're not just hoping to gain votes or even dollars at these events (though both would be great). You want to pick up messengers and volunteers. People who will have such a great time meeting you that they'll tell all their friends about you, maybe host their own house party for you and invite a whole other group of people who can eventually knock on doors, write postcards, make phone calls, and help in every way possible to get out the vote. In sum, you're hoping to inspire real personal investment from the people that you meet — because that's what's going to give your campaign energy and life long-term.

There's a kind of "magic" that makes all this come together: your special ability to just be *you*. First-time, non-traditional candidates have one very powerful advantage when it comes to connecting with voters: they pretty much have no choice but to be "authentic." They can't afford expensive image consultants and stylists. They can't pay to use polling to predetermine every word and idea that comes out of their mouths. They come to their campaigns directly from lives that, hopefully, look very much like their constituents'. And as they grow and evolve from concerned citizens into candidates, they improve in real time, learning how to campaign effectively while voters learn about them.

In a sense, you'll have no choice but to let this low-budget authenticity carry over to all your campaign events. You most likely won't be able to afford high-production value, camera-ringed, stadium-filling (or even high school gym-filling) rallies, at least at first. That's fine — because you can make low-budget events work for you. Doing free and friendly house parties rather than \$1,000-a-plate dinners is a great way to drive home what you're really about (and if you have a signature dish to add to the potlucks, it's sure to help you be remembered). If you grew up in the district you're running in, you'll have real, concrete connections to places in your community — an elementary school, a house of worship, a House of Pancakes — where you can bring people together and share real memories.

As always, the most important thing is to be true to yourself. And yet, you do have to carry out a funny kind of balancing act. You'll be talking about yourself — your life, your way of being, your experiences — but all with the goal of highlighting the points of commonality that you have with the people you're now hoping to represent. Bringing together the "public you" and the "private you" in a way that makes sense and sounds real isn't necessarily easy — no matter how genuine you are. Hannah Rosenzweig, the director and producer of the 2020

documentary Surge, and a campaign ad-maker who specializes in working with untraditional candidates, has a good way of putting this into words: “It takes a while to find who you are as a candidate and to know how to ‘present’ to the world as that person,” she told us. “And ‘that person’ has to be a combination of your true self and this new role you’ve taken on.”

Kim Nelson, our 2020 candidate for the South Carolina 4<sup>th</sup>, dealt with the challenge of self-presentation by very intentionally facing it head on — and was able to demonstrate both her specialized expertise and her regular-mom empathy in the process. In many ways, she was a misfit for her district: a progressive Democrat running for a longtime red seat, a recent Masters of Public Health graduate who didn’t spend a whole lot of time on her clothes and her hair, running in a part of the South where women usually opted for a more high-maintenance look. She frequently encountered men — particularly older men — who took issue with the leather jacket she wore in her official candidate photo and were “horrified,” as she put it to us, by the sight of her naturally curly hair on the campaign trail. But she stuck with her look — for reasons that went way beyond aesthetics. “There’s no visual shorthand for women to communicate that they’re tough and hard-working,” she told us. “That language doesn’t exist, and so we created our own.”

One of her biggest personal struggles as a candidate, early on, was balancing the demands of fundraising and campaigning with her desire to be with her kids. Adding campaign events to the mix could have meant way more time apart. Instead, her campaign team brought them along — and made the events family-friendly so that other parents could do the same. Whenever possible, they held them in locations where kids could safely run around, like public parks or outdoors at breweries. Her staff set up children’s activities, like pumpkin-painting, or making Valentine-cards for seniors. They’d put out juice boxes and snacks — and they marketed the events directly to parents’ groups on Facebook. This became a great voter outreach technique: the promise, for parents, of having a little time to pursue their interests uninterrupted, without having to leave their children at home. (It helped that campaign manager Clara Sandrin had formerly been a camp counselor, was full of ideas, and didn’t think it was beneath her to get her hands dirty doing arts and crafts with the children.)

Nelson also held low-budget happy hours and coffee hours in popular local cafés and restaurants, spreading the word by social media that she’d be hanging out for a while in this or that spot, and inviting people to stop by and say hi. When the coronavirus hit her area — the very week that her campaign was set to launch its field operation — her volunteers quickly regrouped, stayed home, and called local senior citizens, asking how they were doing and seeing if they needed help. Uncomfortable about asking people for money at a time of massive layoffs, the campaign suspended call time, and Nelson and her staff joined the volunteer efforts to reach isolated elderly people, too.

With a dearth of good information coming from her state, Nelson turned her campaign website into a public health resource where district residents could track local cases, find links to reliable information, and find instructions for staying safe, with resources both in English and Spanish. The campaign sent out emails telling local residents to wash their hands and social distance. Nelson went on Facebook Live to explain what to expect as the virus spread, and also made formal appearances (via Zoom) with other public health experts —

something that normally only an elected official would do. All of this showcased her public health background — a smart strategy for authentically modeling how, if elected, she could serve her community — but also provided her campaign with a way to really *do something* at a time when many were feeling panicked and powerless. “We were struggling to find a way to help,” campaign manager Clara Sandrin later recalled. “And this was something tangible that we felt really good about and that we *could* do.”

That’s exactly the right spirit. In your own campaign events, as in everything else, you have to be guided by what feels right. Do what seems like an organic outgrowth of who you are and what you’ve done all your life. You have the advantage of not yet having been “managed” by consultants or “burned” by the media. Think of your newness as a superpower, not a vulnerability. The ability to act from the gut can be an incredible source of strength for you, and it’ll become increasingly hard to access once big, important-seeming people — who you’ll increasingly encounter, if your campaign takes off — are telling you to do otherwise.

The people you need to listen to are the residents of your district. The school parents who are worried about their kids’ education or about gun safety. The essence of grassroots politics is *listening* to your people. You’ll be talking to them too, of course — but, especially early on, you want to listen more than you talk.

You have to get a solid sense of what’s on voters’ minds before you try to dictate policy solutions in your campaign speeches. You don’t want to come off as a high-handed know-it-all. You want to engage people by hearing about their challenges, and then demonstrating that they’ve been heard. People want leadership — and, particularly in a period such as the Covid outbreak in 2020 — they want answers. But the best possible way to bring them with you in thinking about policy is by coming up with solutions *together*.

Meeting voters where they are, after all, isn’t just about showing up at their doors or getting in a room with them. It’s also about learning enough about them to understand where they’re coming from. That means finding ways to speak their language, both literally — if you’re running in a district that contains a large number of voters who don’t speak English as their primary language — and figuratively. If you are not multilingual, you’ll need to find volunteers and, ideally, staff who are. If you’re in a district with voters on both sides of the political spectrum, you’ll likely have to make an extra effort to understand what lies behind your more conservative potential voters’ worldview. In either situation, you have to be very thoughtful about finding ways to communicate on common ground — and very intentional about making an extra effort to breach your gaps.

Our candidates have been incredibly resourceful in showing how that work can be done. Candace Valenzuela, who ran a high-profile, closely-watched and well-funded race that came very close to making her the first Black-Latina ever elected to the U.S. House of Representatives, grew up in the El Paso area and experienced homelessness as a child. She ran in 2020 as a self-avowed progressive against a white Republican woman to represent the Texas 24<sup>th</sup>, a seat that for many years had been considered hopeless for Democrats. When skeptics asked her how she could possibly connect with majority-white moderates, she had a clear answer: she’d grown up in the state, she lived in the district, she was a school board



member who shared the everyday concerns of her neighbors, and she knew how to *talk Texan*. “My progressiveness is just an extension of my life and my pragmatism — and Texans value pragmatism,” she told a group of Square One supporters. “And when you’re able to talk to them about what this means for their lives, they understand.”

Sri Preston Kulkarni, the son of an Indian immigrant, grew up in white, conservative Texas and built a career as a foreign service officer. After returning to the U.S. — horrified by the 2017 outbreak of white supremacist violence in Charlottesville, Virginia — he decided to run for Congress. He ran in the Texas 22<sup>nd</sup>, where nearly 40% of residents were people of color and almost one-quarter of potential voters were immigrants — and where Republicans steadfastly held onto power due to the outsized influence of (mostly) white suburban conservatives and a belief among mainstream Texas Democrats that “immigrants don’t vote.” Disgusted by that neglect of a key potential voting bloc, he made speaking to those communities a top priority, recruiting volunteers and interns representing as broad a swath of the district’s electorate as possible.

By the time of his 2020 general election, his campaign was engaging in outreach to voters in 27 different languages, and had put into place a very successful program of “relational” organizing. It involved tasking volunteers with getting the word out about the Kulkarni campaign, and then later getting out the vote, by instructing them to go through their own local phone contacts, call their friends, family, fellow church, temple or mosque members, and then urge the people they called to do the same. When early voting began before the 2020 general election, the volunteers automatically received a daily email indicating who among their contacts hadn’t yet voted and needed another call. The message then went out down the line, in ever-widening circles. This kind of high-impact, low-budget organizing is enormously valuable for insurgent candidates in any election year. In 2020, with Democratic in-person canvassing shut down by the pandemic, it was absolutely essential. And an unexpected, positive side-effect of the Covid shutdown was that people, stuck at home, were actually willing to answer the phone, and stay on to talk.

## **Scaling Up**

As your primary approaches, every aspect of your campaign is going to have to ramp up. You’ll need to pay for yard signs, radio spots (if they make sense in your district), email campaigns, text and phone banking, postal mailings and flyers and the highest visibility, best-publicized local events you can manage. You will, of course, have been posting from the start on social media. (Under designated accounts for you, the candidate. You may want to consider taking down your personal accounts before you declare, if you want to protect your privacy.)

You’ll also now want to create ads and video content where, for a pretty low cost, you can package your own content in a way that puts your point of view front and center. One way to do this is by establishing your own YouTube channel and posting low-cost videos of yourself talking about healthcare or education or global warming or gun violence or jobs, or whatever other issues are central to your campaign. Posting on YouTube won’t bring you an

audience, so, once again, you'll need to seek out and target your voters where they already are on social media. You might, for example, edit down and package your videos into short digital spots that you distribute online via targeted lists to reach your potential voters.

In the weeks before the election, you'll need to mount your first get-out-the-vote (GOTV) efforts. You'll want to do relational organizing of the sort we described previously. You'll want to be absolutely everywhere you can be meeting voters, and you'll want to have a team of volunteers canvassing, handing out campaign literature, texting, emailing and phone banking for you as well.

None of this is cheap. The more heated the primary becomes, the more expensive it will be still, in terms of your need for staff and for advertising when appropriate. That's the irony of running for office the first time: the better you do, the harder it will get. But that's okay. By the time you get to this point, you'll have your staff in place and you'll be more skilled in every aspect of campaigning. When the challenges come, you'll be ready.

Now that you'll have done all the work to introduce yourself to voters as you are — a real person, with a real person's problems and challenges — fundraising should feel a lot more natural. People will see that you *have to ask* for money because you really are just like most of them, and don't have a small fortune lying around that you can draw on to self-fund your campaign. Owning that — and speaking about it openly — may even become a useful point of contrast with your opponent (or opponents, in a primary), if those on the other side are wealthy and seem out of touch with the day-to-day financial stresses regular people face. Bear in mind, however, that until you've advanced pretty far in your campaign, it doesn't serve you well to go super-negative. The main emphasis *always has to be on you* — and in an overwhelmingly positive way.

Sometimes, that really won't be easy. You'll be exhausted and frustrated and frazzled by one too many hours of call time, too much Diet Coke and too many takeout meals. It will be a big challenge just to stay awake, not to mention projecting the confidence, competence and comfort in your own skin that you'll need to show voters. Because no matter how confident you are, no matter how good a person and a candidate, there will be days when a lot of negativity is going to come your way. At times like this, be sure to lean on the trusted people who love and believe in you. And remember that the voters — if you're doing things right — believe in you too.



## Step 6: Staying the Course

“Run with as pure a heart as you can. Run a campaign that you’d be proud of.”

*Ronnie Cho, 2018 campaign manager and 2020 senior advisor to Lauren Underwood, Illinois 14<sup>th</sup>*

*In some ways, the challenge of remaining you will only intensify the more successful you are in your campaign. That’s in part because, if you win your primary, you will encounter a level of personal scrutiny like never before. You may attract major media attention — a mixed blessing. You’ll also gain at least some recognition and support from the party powers-that-be. That support can be transformative. But it will also come with its own set of complications.*

If you win your primary, a lot of good things will start to happen.

The endorsements you tried to get early on will very likely start to come through. Some will come with no money, and some can come with quite a lot (often in the form of independent expenditures — money from Super PACs that don’t coordinate directly with your campaign) — and with a lot of technical support and visibility for your campaign, too.

Whatever happens won't necessarily occur all at once: you might, if you're a longshot in a swing state, get just a little bit of funding at first, but then, if your candidacy really becomes promising, you could be picked for the DCCC's coveted Red to Blue list of candidates running strong campaigns in swing districts who receive extra support for campaign strategy and funding.

All of that is indisputably great. But there is one caveat: getting endorsements and funding from the DC establishment — for federal races — comes with some strings attached. And candidates in state or local races may face similar pressures from the state or local party and party establishment figures.

Specifically, some of the endorsements will require you to sign contracts with consultants from a pre-approved list. Many of these consultants — also called “vendors” — are very smart and very skilled at the work that they do. But there's a problem with the ecosystem in which they operate. While they all want their candidates to win, they also want to make money. (And at the top DC consultancies, they make a *lot* of money.) That leads to a lot of misaligned incentives, in terms of how the work is done and where the money goes and what's in the best interest of individual candidates.

Here's how it works: Every time that one of these consultants provides a service for a candidate — buys a TV ad, or creates and sends out a piece of mail — they make a commission, and that commission is paid by the campaign. So, at the end of the day, whether or not their services are effective for a particular campaign (and for our candidates, it's far from a given that traditional approaches to mail and advertising are beneficial), the consultant is incentivized to sell you as many TV ads or to get you to send out as many pieces of mail as possible. Usually, your general consultant handles all this for you, which can make it seem like you're getting a good “package deal” as well as a convenience when you sign with them. But none of it is transparent: you don't know, when your campaign writes the general consultant a check for a TV ad or a mailing, how much of what you're paying is for the ad or mailer and how much is being pocketed by the consultant.

And here's where it gets more difficult still: In Washington, D.C., there's essentially a revolving door that will take someone who has been working at one organization within the party establishment for a few years to a consulting firm (an advertising firm, or a mail firm, for example) for a couple of years, and the cycle continues. However nicely this works for the party and the consultancies, however, it means that individual candidates and their campaigns end up, once again, locked into a very closed system that really isn't set up to accommodate — much less to embrace — people who have historically been outsiders.

Very few of the companies that are on the list of “approved vendors” are headed by people of color. Very few employ many people of color. The vast majority of consultants themselves have never worked with a candidate of color before. And this can lead to some very bad advice.

We've seen countless examples where an outsider candidate was given advice from DC experts to “tone themselves down.” Making themselves over into someone who's more “like a candidate” — which really means more like who candidates and elected officials have

always been. Black women have most frequently and most egregiously been on the receiving end of this. But, to a lesser extent, white women get it, too, if it's assumed that they don't conform to whatever the expectations are in the communities where they're running. And men of color have their own indignities to deal with as well — particularly when it comes to what they wear, and whether or not it's "acceptable" for a candidate.

It's hard enough, out on the campaign trail, to have people commenting on your hair and your clothes and your weight. To be asked, if you're a young woman, if "you're sure you know what you're doing," and if you're a mother, "who's at home taking care of your kids." To have people asking you why you're so ambitious, why in such a hurry; why you don't scale down to something more "realistic," like running for school board. ("The issues I care about are federal," is a good answer for that.)

When the comments come from your own side — as when Black women are told they need a "makeover" to appear more "professional" (i.e. more white) — it's far more painful. It's easy to internalize the negativity, especially if it reinforces messages that candidates have received all their lives. When that happens, very old and pernicious forms of self-doubt may start to re-emerge: "Maybe I shouldn't run. Maybe I'm *not* the right person." And besides being psychologically wounding, that kind of feedback can do real harm to a campaign. Unsurprisingly, when some candidates we've worked with have altered their messaging or self-presentation in ways that they'd been told would make them more "palatable," the result was inauthentic, and it backfired.

## **Keep the Faith**

This is another example of why, now and throughout your campaign, you'll need to have your own validators: staffers and advisers, funders and voters. *Your* people. And it's why you have to validate yourself by reminding yourself, over and over again, why you're running — for change that can make a momentous difference for the people of your district. Believing profoundly in the utter necessity of your campaign and keeping focused on your larger mission will strengthen you, especially when things get tough and you need a thick skin.

If and when the big-time consultants enter the scene, there are ramifications for staff that you'll have to be aware of, too. If your senior staffers are young and relatively inexperienced, it's likely to be very hard for them to stand up to the emissaries from D.C. and make themselves heard. Pushing back could really hurt them professionally, too, because the world of campaign hiring is a small one, and all roads lead back to a small number of organizations in D.C. "There's a great pressure to please them," a campaign manager told us, "because their organizations become an echo chamber of who's good or bad to work with and ought to be hired."

As the campaign's leader, it will be your responsibility to stand by your staff when appropriate, speak up for yourself when necessary, but also to judge when and how to pick your battles. Be willing to listen to outsider advice. And don't burn any bridges. You'll need, long-term, to keep up really good relations with the big consulting firms and the national endorsing groups in Washington. You don't want to antagonize the establishment if you're

fortunate enough to have won its support as a first-time candidate. And if your race is receiving generous amounts of money from the party and its allies, your ability to go your own way is going to be pretty limited.

If your campaign ultimately has enough money, you will be doing message testing and polling, and you'll be advised to change your message and your self-presentation with the goal of ironing out whatever wrinkles or personality particularities bother some voters. But if your gut tells you that you're being pushed in the wrong direction, you have to defend yourself, your team, and your district.

It's the authentic you, after all, who won your primary election. Who inspired whole teams of volunteers. Who raised enough money to stay in the game. And it's your staff who know you, know your district and — if they've helped get you this far, know what it takes to reach your voters. The very best way you can stand up for them is by making sure they have the support they need to keep doing their jobs well. If possible, help your senior staff find mentors — experienced people who are outside of the immediate circle of your campaign, who can serve as a sounding board, give gut checks, and also be savvy about all the different incentives and motivations at play.

In the end, what will be in your best interest is to find a way to navigate the distance between the party line and your own truth, to “meet them where they are and give them what they need,” as one former campaign manager likes to put it. And then finesse the result so that it's real. That's why those Post-It Notes from back in the mission statement exercise days are so helpful and worth keeping. When in doubt, go back to the clear and simple message that guided you from the start, and see if you're still aligned with it.

## **Managing Your Media**

At this point in your campaign, your relationship with the news media is going to be something of a tightrope walk, too.

On the one hand, you'll really need their attention. On the other, if your campaign is making news, they're going to need access to you. To keep the relationship mutually beneficial, you will have to make smart choices.

Counterintuitive though it may seem, it's your local reporters who are likely to be the most important journalists for you to cultivate — for the very same reason that it was so important early on for you to sit down with anyone and everyone with their finger on the pulse of your district. Local reporters, editors, columnists and radio or TV personalities know your district and its residents. They know what issues matter locally, they know your opponent's background, and they know what Democrats have attempted to run for your seat before. They're the most likely to really take the time to get to know you — and theirs may well be the voice that your voters respect the most. (And their publication or station may well be the one that your voters actually read, watch or listen to.)

Once you're past your primary and are getting close to the general election, your campaign will, most likely, bring on either a full-time communications director or a consultant. That's because national media attention is very tricky. It's seductive and hard to

turn down. It can make a major difference in your fundraising, giving you access to a vastly larger pool of potential donors. When Lauren Underwood made the cover of Time Magazine in January 2018, her fundraising numbers went through the roof. The headline on Liuba Grechen Shirley's post-primary *New York Times* feature — “She’s Trying to Pull an Ocasio-Cortez. Her Target: Pete King” — wasn’t exactly on-message, but it was eye-catching, and in a summer when there was a lot of excitement around insurgent, outsider female candidates, it turned out to be a real turning point for her, too.

You shouldn’t turn down all requests from national media (if you do, they’ll stop calling). You should just be thoughtful and judicious. If you grant interviews to the *New York Times* or the *Washington Post* or *Politico* or the big TV networks, you *really* have to be ready for your quotes to ricochet around the entire country for days or even weeks, months, or years on social media. In addition, you should be aware that, if the big news outlets are coming to you — a brand-new candidate — they’re probably putting you in a big national trend story, which may or may not be conceived with an angle that’s helpful for you in your district.

## **Remember Who Matters – and Get Them Out to Vote**

The closer and closer you get to your election, the more intense the pressures and pace of campaigning will be. It’s easy to develop tunnel vision. But you’ve got to stay grounded. You have come *so far*, and you have just one major challenge that remains: getting out the vote.

So do what you have to do to keep yourself healthy and well-resourced. Summon up all your energy. Take the time to rev up your staffers, volunteers and supporters — you’re going to need them to put everything they’ve got into going door-to-door, calling, texting, emailing, putting up signs, handing out literature, and helping people figure out where (their local polling place) and when (election day, or early voting info) and how (do they need a ride to the polls? can they vote by mail?) they can vote. And get yourself out in front of voters: canvassing, making public appearances, shaking hands, listening, making sure that people feel heard, and reminding them of *their power* to bring change by voting.

Getting out the vote (GOTV) is a very distinct — and hugely important — stage of campaigning. Typically, it starts the first day of early voting, the day vote by mail starts, and/or the last four days of the campaign including election day. Everything you do in the earlier stages of the campaign is to build capacity for this ultimate end point. During GOTV, you’re no longer convincing people to vote for you. Instead, you’re focusing your efforts on the people you’ve already identified as *your voters* and putting everything you’ve got into physically getting them to cast their ballots.

## **A Few Final Words Before Election Day**

With the finish line in view, we’re going to leave you with just a couple of do’s and don’ts to keep in mind as you head toward the finish line.

*Don't make yourself or your staff crazy by measuring yourself against other candidates.*

You're going to be anxious, and it will be a big temptation. For Congress, for example, with 435 elections for the US House in any one cycle, there's always going to be *someone* who seems to be doing something better than you. For state and local races, you may face the same pressures. Maybe another candidate is actually someone you know. Maybe, out of a genuine desire to help, they give you advice, which you excitedly bring back to your nonplussed campaign manager.

The problem is, as any parent of any school-age child has ever said: there's no use in comparing yourself to others. You have to do you. Every race is different. Every candidate is different. And if you can't do you for yourself — because your self-confidence is flagging with fatigue and constant stress — *do it for your campaign staff*. Because they're down in the trenches, trying to move mountains for you day after day. Second-guessing their strategy at the eleventh hour will only create unnecessary pressure and strain, right when you need them at their best.

*Don't over-spend.*

In the final days of a close campaign, your funders and advisors from D.C. are going to tell you to “spend every penny” and “leave it all on the field.” It's true that it's urgently important to get yourself and your name out there — and to get voters out to vote — but you've got to be careful as well *not* to spend money you *don't have*. You're going to need to have enough money left in the bank to pay staff salaries in the period when you wrap up after the election (and if you can afford to pay people through the end of the year, all the better), and you should also have some reserve to pay any legal fees in case you end up with a contested election.

*Do take the time to pause and remember how far you've come.*

We will always remember how it felt, near the end of Lauren Underwood's first campaign, when she had picked up a lot of steam and was reaching the point where she posed a serious threat to her Republican opponent. The race had become so close, and had attracted so much attention from Washington, that Joe Biden came and did a rally for her a couple of weeks before the general election. Many local and national media outlets were in attendance. Right after Biden spoke, he got back into his car and left, and all the press immediately formed a gaggle around Underwood. She had dozens of microphones shoved into her face, and almost as many cameras behind them. Everyone was asking questions at the same time. It was unlike anything she'd ever experienced; she had barely ever done an interview that was more than one-on-one before. And yet, in that moment, she stepped up, and grew into it. She managed the situation, answering those questions calmly, as though she had been doing it her entire life. She knew which questions to take and which to pivot



away from, remained calm and collected, and gave great answers. She was ready for the moment — not cocky, but confident. And it all came off as completely real — because it was.

We've kept a picture of that moment because it reminds us of the arc that we hope all our candidates will experience. And that growth is what learning to run for Congress is all about.

*Last but not least: do try to bear in mind on Election Day that winning is not a zero-sum game.*

Of course, after all you've done, you'll want more than anything else to win your race. But there's one last thing we want you to hear, and it comes from the heart: If you're a new candidate, an insurgent who wasn't born with a silver spoon and a ready-made bullhorn, and you've made it to this point, then — win or lose — you've already triumphed.



## Beyond Winning

“How can we win a stronger country and a better democracy and build a bigger table that is inclusive, if we don’t allow everyone to sit at that table? To feel like they are truly part of the change? To really bring their values and their ideas to policy? We will not ever achieve it unless we diversify those tables, not just by race and gender, [but] by economic background, geographic region, demographics. *Everyone* has to be at that table.

*Desiree Tims, 2020 candidate for Ohio 10<sup>th</sup>*

Election Day isn’t an endpoint.

If you win, it will be a new beginning. After just a few days, you’ll make the shift from campaign to governing mode. If you ran for federal office, you’ll wrap up your campaign, say your grateful good-byes, start hiring Hill office staff and — believe it or not — start fundraising again for your first *re*-election campaign. You’ll have to start getting ready to move, at least part-time, to Washington, D.C. You’ll brush up on policy, and you’ll start to learn what you can about congressional procedure.

All of this will happen very fast and is likely to be really overwhelming. Our advice: be sure to pause to register the moment and stay grounded. Carve out some time to revisit your mission statement. Reconnect with the values and priorities that brought you this far. Picture the people you met on the campaign trail — they will be your anchor.

If you don’t win your election — and the vast majority of first-time candidates do not — you’ll be facing a new beginning too, albeit one that hurts a lot, at least for a while. The

exhaustion you've kept at bay through sheer adrenaline will hit you all at once, along with a whole mess of unwelcome emotion.

Our advice again: if you find yourself craving rest and family time, grab them. But don't lay low for too long. Your campaign may have ended on election day, but your work — the drive for change that got you up and running in the first place — isn't going to go away. That's why you too need to take the time to reckon and reassess: what's the best way now to continue what you've begun? What have you learned about the political landscape, about your district and yourself that needs to be taken into account as you figure out the way forward?

We hope that, win or lose, when you look in the mirror post-election, you'll be able to see what we see in each of our candidates, no matter what the outcome of their particular race: someone who, simply by stepping up and being themselves, has changed the face of American politics. Someone who brought a different perspective to debates about policy — channeling the voices of thousands, if not millions, of people who previously felt like they weren't heard at all. Someone who broke down barriers. Demonstrated new faith in American voters and new ways of reaching and connecting with them. Who chipped away at old party certainties about what “winnable” looks like and who the “right” candidate is and can be. In sum: someone who redefined the possible. And who, by opening the gates for others to follow, scored big wins that will reverberate far beyond the outcome of any individual election cycle.

We can understand that all this might sound like so many nice words to you. But we've seen the scenario play out in real life, over and over again.

Liuba Grechen Shirley lost her race to unseat Peter King in 2018, but her campaign nonetheless scored some very big wins: Grechen Shirley came so close to winning that King decided not to run for re-election the following cycle, depriving the Republican party of one of its most powerful and long-entrenched right-wing leaders. And, on an even larger scale, she changed the electoral landscape for working parents, breaking down the chief barrier that, in the past, blocked a great many from even trying to run for office: the sky-high cost of childcare. After she successfully petitioned the Federal Elections Commission to allow federal candidates to spend campaign funds on childcare, eight other candidates for Congress reported babysitting and childcare as campaign expenses, and a number of states began considering similar legislation, sometimes with bipartisan support. She then kept the momentum going by founding her own PAC, Vote Mama, which as of this writing had helped 43 mother-candidates win offices ranging from school boards to city councils, and state legislatures to the U.S. Congress.

Desiree Tims and Candace Valenzuela lost their respective races for the Ohio 10<sup>th</sup> and the Texas 24<sup>th</sup> in 2020. Yet they also took districts formerly written off by national Democrats as “hopeless” to promising “Red to Blue” status. More important still: they smashed key political stereotypes.

Tims, a Black woman running in a 77% white district, handily beat a white man, Eric Moyer, in her primary, receiving 70% of the vote with equal support from voters of all races.

Valenzuela was part of a vanguard of high-profile Texas Democrats (along with our other Texas candidates Sri Preston Kulkarni and Gina Ortiz Jones) who aimed not just to win seats away from Republicans, but also to dismantle the long-held belief by leaders within their own party that “immigrants don’t vote.” By inspiring a groundswell of grassroots activity, their campaigns succeeded in changing the whole look, tone and operation of party organizing in their state. They engaged thousands of new people from communities of color that had never felt like they had a voice in Texas politics before, and they empowered those people to keep the work going long after Election Day. As a result, when the national party comes around again in 2022, Valenzuela told us in a conference call with supporters during the summer of 2020, they’ll find a freshly trained and invigorated force of Democratic political actors on the ground, ready to lead.

“We’re training young people,” she explained. “We’re training them in campaign finance so that they know how to have their own campaigns later on, or if they’re thinking about becoming the next generation of campaign staff. We’re basically trying to make this process about teaching people in the community to organize. We’re trying to build a Democratic infrastructure, and it’s happening all over Texas.”

## **Our Biggest Win: Empowering You**

Square One started with a simple belief: if we could discover and support young, diverse, bold candidates — real people running for the right reasons — then we could elect Democrats in every corner of the country and create a stronger, more representative democracy. Since day one, we’ve never swayed from that view, because with time we’ve only grown more certain that it’s true.

In the coming years, we want to see more talented Democrats running for the right reasons in every single district all across the country. We want to see them daring to run in the most heavily Republican areas, even in utterly impossible-seeming places where Democrats haven’t won for many decades. We want them to have the means to take big chances and the support to hang in, even if it means running multiple times again.

That’s because if your goal is to profoundly change the face — and the functioning — of America’s political leadership, you can’t do it in one election cycle. You have to take the long view. You have to name, face, and start to dismantle the sorts of structural impediments that keep regular people of all backgrounds and from all communities from running for office. And you have to build a pipeline so that those people can stay in the game long enough to make their way to Washington, D.C.

For us, the biggest win of all would be for our work to one day become unnecessary. We’d love to see so many women, people of color, LGBTQ candidates and other now-non-traditional candidates running for and winning office that the whole question of fair representation would be a thing of the past. To see such a shake-up that candidates who weren’t rich and well-connected wouldn’t need us.

That day — however distant — *will* come. Huge progress has already been made in recent years. But there's a whole lot more work to be done. We're doubling down.

And we hope that, with this guide in hand, you're feeling ready to get to work, too.

## About Square One

Square One is a non-profit that recruits and discovers young, diverse, progressive candidates and provides high-impact, hands-on support in order to win.

**NEW OPPORTUNITY** | Square One looks for areas long overlooked by the Democratic establishment, identifies compelling, young and diverse candidates and creates the infrastructure needed for them to run and win, ushering in a new generation of political leadership.

**BREAKING DOWN BARRIERS** | For too long, women, people of color and the LGBTQ community have not been properly represented in government. By recruiting diverse candidates and providing them the necessary tools to run for office, Square One is working to create a government that truly represents the people it serves.

Learn more at [www.squareonepolitics.org](http://www.squareonepolitics.org).