

From: Ben Tyson

I started doing this in 2008, knocking doors as a field organizer for Obama in Pueblo, Colorado. Since then I've run statewide coordinated campaigns, managed mayoral and congressional races, built a five-state volunteer program from scratch, run paid canvasses, and started a PAC and then a firm of my own. And somewhere along the way I realized that almost everything I know about building a field program was scattered across old field plans, half-finished training decks, goal calculators, and my own head. Which isn't much use to anybody else.

So this is my attempt to put it all in one place. After more than 15 years of writing field plans, building spreadsheets, chasing flakes and staring at Goal vs. Actual reports at 11pm (some of those programs went great, some of them very much did not), this guide is the culmination of everything I know about how to build an organizing program that wins.

I've worked on just about every type of campaign there is: presidential, Senate, governor, congressional, mayoral and state legislative; candidate campaigns, coordinated campaigns, PACs, IEs and issue advocacy; rural, urban and everything in between. Every campaign and district has its own twists, politics and dynamics, and there's no one-size-fits-all way to win a race. But the fundamentals hold up from one race to the next, and those fundamentals are what this guide is built around.

Think of it as the outline I'd hand a new field director on their first day. If you do things differently, that's fine (and I'd honestly love to hear how). I focus on voter contact organizing because it's what I know best, and every other part of the campaign matters too. The goal is simple: help Democrats win any and every race by laying out how to build an organizing program that delivers.

So where does a field program start? Well, not to be cheesy, but it starts with you.

Of course in this case, by "you" I mean the candidate. So maybe this doesn't apply directly to you, you might not be running for office yourself, but maybe you are a campaign staffer or volunteer, maybe you are a friend or fan who wants to support your favorite candidate, maybe you are just interested in learning what it takes. We all have a part we can play, but remember that there are over 500,000 elected offices across the United States, all of which can make a difference in our fight for the future, so never discount yourself as someone who can serve! (And if you are interested in learning more, hit up my friends at [Run for Something](#) who can help point you in the right direction).

But to get to the nuts and bolts, once you have (or are) a candidate for office, I'm outlining best practices across 10 areas to build and manage your campaign's field program:

1. Analyze the district historics and campaign resources.
2. Craft your Path to Victory - including your budget topline goal and turnout win number.
3. Break down the electorate and create initial universes

4. Look forward and reason backwards - set your goals and structure the program
5. Building the team - roles & responsibilities
6. Volunteer recruitment - goals, universes / data, confirmations, and pitching
7. Volunteer management & training - canvassing, phonebanking, texting, relational
8. Setting up and managing data & VAN - pulling lists, entering data, good coding
9. Reporting and monitoring - tracking progress and program evaluation
10. Other campaign considerations - understanding the connection between field, digital, comms, political, and fundraising

This is a long document, so feel free to take it in chunks, and feel free to ask questions along the way. You can reach me at bentysongold@gmail.com or find me on LinkedIn.

At the end, I'll also add a few thoughts as a quasi appendix on paid programming (canvasses, phonebanks, texting, relational) for campaigns on which those are possible/make sense.

Before we get to all that though, I want to take a crack at 2 common questions first.

1. Why field - isn't this an overly romanticized part of Democratic campaigns that doesn't actually work?

Because field and voter contact do work and they are vital for any successful campaign.

[There is lots and lots and lots and lots and lots of research](#) establishing this across all methods of field voter contact - canvassing, phonebaking, texting, and relational organizing. "Is field effective" is not really a debatable question - it's a fact. It is.

Now it is certainly a very very important debate to ask "what are the trade offs to field?" What is the marginal value of an additional voter contact on the door vs a mail piece or a digital ad in someone's feed? How should a campaign prioritize a candidate's time and its budget paying for an organizer to recruit 10 volunteers depends on how much money it has, how much time do they have until Election Day, how much value are they getting from an additional dollar to media or mail or any other type of voter outreach. All extremely valid questions, and a good campaign must balance all of this, but to write off direct voter contact just on the claim that it has zero effect is not intellectually honest.

2. Why do we call it field?

Ok, so this one is a bit more in the weeds and insidery, most folks probably don't care, but it is worth addressing why we are saying "field" in this document instead of the more common term "organizing." There is really no problem either way, in my opinion, but I'm trying to draw a line of distinction by using the word "field." Organizing can be a very broad term - there is political organizing, community organizing, digital organizing, even finance and fundraising can be seen as donor organizing - and all of these are extremely important parts of a well functioning campaign.

What I want to discuss specifically from my experience might be most accurately labeled “voter organizing.” The process of reaching out to have one on one, direct conversations, between a voter and a volunteer to bring the campaign’s message to the voters who matter most. This is not to diminish the importance of the message itself or any other type of organizing/department, but what makes field and voter organizing unique is the ability to have a two-way conversation that breaks through a noisy information environment. The more of these conversations that a campaign has - the better.

The 2025 Democratic Campaign Field Guide

Welcome to the Field Campaign Guide! I'm excited to take you on this journey through all the in's and out's of the programs I love so well and believe can set our country on new directions - big and small - but all meaningful. As a participant in field programs, you are part of grassroots efforts, tied with others like you across the country, in a great effort to actively bring about positive change for all of our futures. Whether you are a volunteer who knocks on a single walk list, a campaign manager juggling 1000 priorities at once, or a candidate trying to inspire your neighbors with a message of hope - there is nothing more empowering than taking the future in your hands by going to talk to voters across the country in direct, one on one, conversations.

This work is not easy, it is often repetitive and marked by afternoons of unanswered doors or phone call hangups or rude responses to your entreaties - but it is 100% worthwhile.

Welcome, to the Field.

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I. Analyze the district historics and campaign resources.

A. Finding previous election results & basic district data

This is all about getting a macro understanding of the campaign you need to run. Even if this is a district in which you have lived and understand well, reviewing quantitative data at the beginning is a great place to start. There are several sources of data specifically to review.

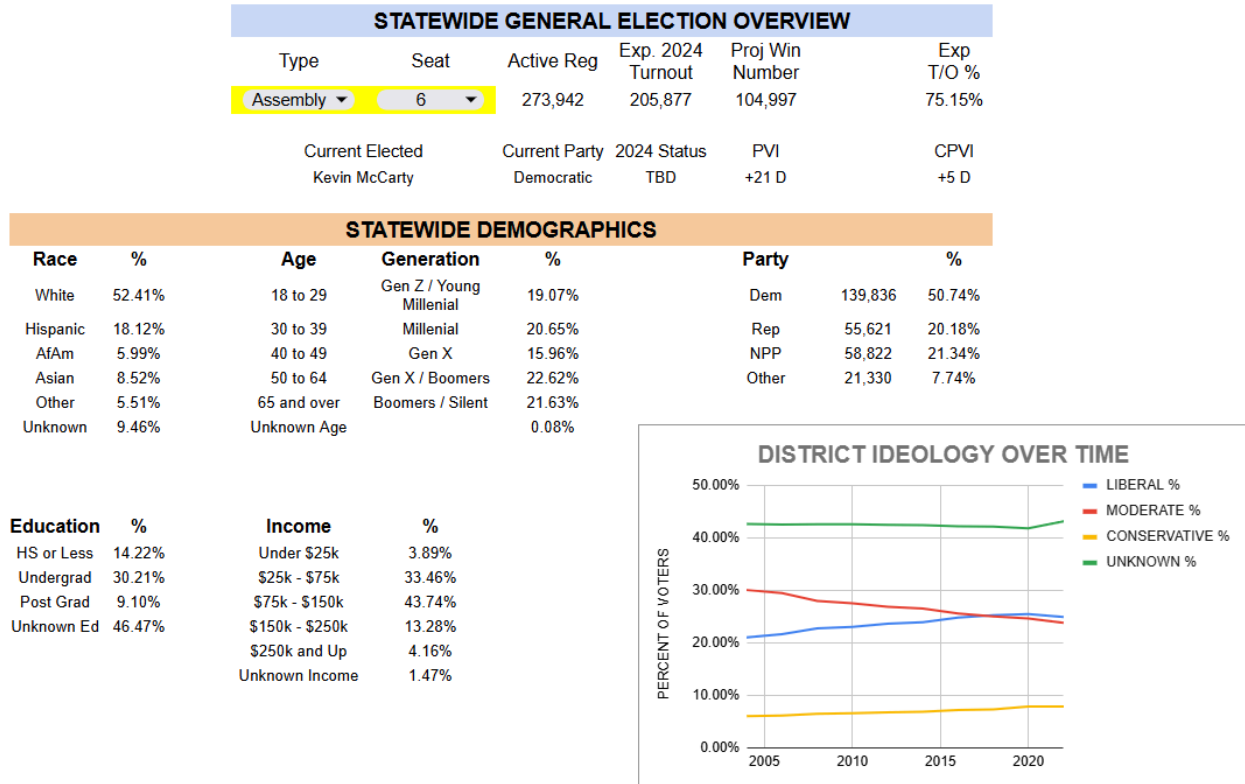
1. Election Results. For local races this will be kept and accessed from a county or city government website. Look for the department of elections, often under the clerk's office, and find previous election results. What you're trying to do is get a sense of how previous candidates performed over time - how contested have previous elections been? Does the district appear to be getting more or less favorable to your campaign?

If it helps you can also export the data on a county or even precinct level, and then reaggregate it to look at performance changes over time in different regions of the district or state:

REGION	CMC 04 vs CMC 06	CMC 04 vs Nixon 08	Obama 08 vs Nixon 08	Carnahan 10 vs Koster 08	Carnahan 10 vs CMC 12	Obama 12 vs Nixon 12	Koster 12 vs Kander 12	Carnahan 10 vs Kander 12
GSTL	3%	12%	11%	12%	15%	13%	6%	8%
Joplin	6%	14%	8%	10%	18%	15%	10%	8%
KC	1%	5%	3%	4%	10%	4%	2%	7%
GKC	2%	9%	12%	12%	17%	13%	8%	9%
Mid Mo	2%	8%	7%	10%	16%	12%	10%	9%
NE MO	9%	9%	4%	11%	14%	13%	5%	9%
NW MO	5%	11%	13%	13%	20%	15%	6%	11%
SE MO	3%	12%	15%	13%	16%	18%	10%	7%
Springfield	7%	18%	16%	10%	18%	14%	13%	6%
STL City	2%	8%	2%	2%	7%	2%	1%	4%
STL County	1%	11%	6%	6%	13%	7%	4%	7%
Total	3%	11%	10%	10%	16%	11%	7%	8%

2. Demographic Data. This does not need to be an exhaustive study, and it can be pulled through your voter file access (more on setting that up later), or directly from a source like the US Census bureau, but create time at the beginning to check assumptions and beliefs about the voters.

Again, aggregating from the precinct or county level into regions or neighborhoods that are more commonly used by voters on the ground to think of their communities, you can very quickly look at race, age, and potentially even data markers such likely highest educational level or income. All of these can provide some broad strokes to think about what issues, messages, and tactics might be more or less important across the campaign as a whole.



B. Look at campaign spending

This gets to one of the most important tasks to start up a field program, or really an entire campaign - setting the budget.

Now, all of this is said without any judgment or approval on the current state of campaign finance laws in the United States (which is to say in a nutshell, terrible), but the reality is that a campaign budget is simply a function of whatever the candidate and campaign can raise. This sounds like a truism, and it is, but this is to emphasize that there is no “magic number” or amount or way that a campaign budget is set at. If a candidate can raise \$100,000 - either from donors or their own pocket - then the budget is \$100,000. So to set an initial topline, campaign wide, budget a candidate must sit down with their finance staff, family, supporters, campaign management or general consultant and have a very honest and frank conversation about their abilities based on their own resources, network, and ability to do the work to raise it.

The research comes in in the next step, using a state’s secretary of state campaign finance filings page, or county election filings, or the Federal Election Commission reports, and look at how much previous candidates for similar seats have raised/spent. Comparing that with the internal assessment on the budget topline will determine if the campaign is in a competitive position.

Then balancing between what the filings show a campaign likely needs to spend to win the race against what the candidate thinks they can realistically raise will give the campaign manager and/or general consultant a topline number from which to build a budget.

- C. Creating a balanced big picture view of the race: quantitative and qualitative
Put all of this together and create an internal narrative for the campaign. What are the base vs. opposition areas, which voters are going to be key targets for outreach, how competitive is this going to be, and what is it going to cost.

This narrative honestly has little practical, day to day effect, but is useful to frame internal conversations with the candidate, donors, and staff.

II. Craft your Path to Victory

A. Setting your budget topline goal

Don't let anyone fool or sell you on anything different - there is no absolute right way to divide a budget between campaign priorities. The biggest bucket will almost **always** be paid media (generally speaking referring to the bundle of advertising on TV - streaming, broadcast, and/or cable plus digital display, social media ads, radio, print ads, and direct mail), but the exact ratio between media, field, and other overhead; not to mention the division of the budget within the media plan, is all entirely up for debate.

Here is an example that is very heavy on field and organizing. Generally speaking, 40% will be the lower end of spending on media that you will see, and it can be upwards of 80% on smaller races that rely most on mail + volunteer activity for in person outreach.

CAMPAIGN \$3,200,000 BUDGET		
	TOTAL	
CONSULTANTS TOTAL	\$358,750	11.13%
PAYROLL & RELATED EXPENSES TOTAL	\$233,296	7.24%
OPERATING EXPENSES TOTAL	\$140,697	4.36%
PAID MEDIA TOTAL	\$1,285,500	39.87%
POLITICAL / COMMUNITY OUTREACH TOTAL	\$115,745	3.59%
FIELD TOTAL	\$895,449	27.77%
RESEARCH TOTAL	\$160,000	4.96%
TOTAL EXPENSES	\$3,224,153	

B. Calculating estimated turnout and a win number

Knowing the expected number of voters that will be casting a ballot is important context for planning the campaign and crafting goals, but keep in mind that this is not a magic number - day to day it will not have a practical effect on the race.

With that in mind, there are 2 valid approaches to calculating a turnout number: an estimation based on the initial review of previous vote history in the district, or more precise modeling. Some campaigns will employ actual data scientists to make such a model, but after a brief review of VAN and voter file data generally, I'll offer a basic modelling technique that anyone can use.

1. Getting access to VAN and voter file data

Anyone reading this wonder how campaigns always get your phone number to call or text, or your name when they come knocking on your door? Well here's the big reveal - you gave it to them!

Well, sort of. But when you register to vote with your local county clerk or board of elections or the secretary of state, that goes into the voter rolls which are (with some limitations) public information. So campaigns will get access to that data, political parties maintain it in a database, and use it as the basis for voter outreach.

For campaigns this means you can get voter data to use in your targeting and voter outreach yourself - either directly or from a vendor who aggregates/maintains it - but the best and most common source is from your local or state Democratic Party. The history of the evolution of Democratic data is a long and fascinating tale (for those interested, [this article is a great place to start](#)), but suffice to say - find and contact your state or county party and tell them you need VAN access for your campaign. There's usually a fee of varying amounts involved, but this is the core component of your campaign infrastructure, and a necessary investment.

I'll cover how to use VAN in detail in Section VIII of this guide, but for now know - there is without a doubt a love/hate relationship between VAN and field campaigns across the country, but it is the unambiguous best source for voter data and you get it [from your State Party](#).

2. Calculating Turnout

This is a basic technique for calculating turnout by breaking out the electorate into buckets based on voting history. You can do this on a simple district level analysis, or for more nuance or in cases where district lines have changed recently, at a precinct level and then aggregate results up to the district/regions you want.

The idea is you are going to determine how many registered voters are new or non voters (voted in 0 previous elections) vs varying levels of voting frequency (voting in 1 of 5 previous elections, 2 of 5, 3 of 5, 4 of 5, or 5 of 5), and then comparing the breakdown of the registered electorate to the voting electorate, and then applying that to the current registration.

That sounds more complicated than it is, so here's a template and walk through. Here's the final product using a 2024 election as an example:

TURNOUT CALC	REG	VOTED	0/6 VOTERS	0 / 6 %	1/6 VOTERS	1 / 6 %	2/6 VOTERS	2 / 6 %	3/6 VOTERS	3 / 6 %	4/6 VOTERS	4 / 6 %	5/6 VOTERS	5 / 6 %	6/6 VOTERS	6 / 6 %
2024	273,942	221,537	39,665	14.48%	25,887	9.45%	26,325	9.61%	22,830	8.33%	24,544	8.96%	31,025	11.33%	51,261	18.71%
2020	254,672	218,589	36,577	14.36%	25,654	10.07%	26,260	10.31%	20,838	8.18%	22,373	8.79%	27,345	10.74%	36,577	14.36%
2016	206,769	161,453	25,721	12.44%	16,042	7.76%	16,047	7.76%	16,472	7.97%	18,295	8.85%	21,773	10.53%	47,103	22.78%
2012	178,276	134,101	16,413	9.21%	14,611	8.20%	17,058	9.57%	14,408	8.08%	16,783	9.41%	17,986	10.09%	36,842	20.67%
2008	151,667	126,953	26,330	17.36%	16,833	11.10%	16,790	11.07%	12,125	7.99%	12,482	8.23%	13,969	9.21%	28,424	18.74%
2004	120,571	96,497	22,943	19.03%	12,206	10.12%	11,258	9.34%	9,079	7.53%	10,708	8.88%	10,931	9.07%	19,372	16.07%

The most time intensive part of this comes (A) setting up your spreadsheet, but then (B) the initial step of pulling all of the counts. From VAN you want to pull lists for each of the selected cells below to give you a count based on vote history. Yes, the registration numbers from past years are not accurate in VAN vs. how many voters were registered at the time. That's fine. You are trying to get the percentage of voters who fall into each bucket within each year, to determine a forecast or average, not pull the exact historics.

For the very nuts and bolts of this, pulling the 0/6, 1/6, etc numbers is a 2 step search in VAN: Step 1 - Everyone who voted in year XXXX. Step 2 - Narrow to people who voted in exactly 0/6, etc of the previous elections. Click on "Preview results" and plug that into the table (or if you want the nuanced view, run that list through counts and crosstabs, set column 1 to Precinct, click refresh, then export the results and paste them into a reference table on which you can run your SUMPRODUCT formulas for aggregating results.

TURNOUT CALC	REG	VOTED	0/6 VOTERS	0 / 6 %	1/6 VOTERS	1 / 6 %	2/6 VOTERS	2 / 6 %	3/6 VOTERS	3 / 6 %	4/6 VOTERS	4 / 6 %	5/6 VOTERS	5 / 6 %	6/6 VOTERS	6 / 6 %
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From there if you have set up your formulas ahead of time, everything will calculate for you. Within each year, calculate the percentage of the registered electorate for each bucket you are analyzing.

TURNOUT CALC	REG	VOTED	0/6 VOTERS	0 / 6 %	1/6 VOTERS	1 / 6 %	2/6 VOTERS	2 / 6 %	3/6 VOTERS	3 / 6 %	4/6 VOTERS	4 / 6 %	5/6 VOTERS	5 / 6 %	6/6 VOTERS	6 / 6 %
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Then, for the current or target year use a forecast or average formula to project a percentage for each bucket based on the historics.

fx =if(forecast(\$O\$9,AE\$10:AE\$14,\$O\$10:\$O\$14)>average(AE\$10:AE\$14),forecast(\$O\$9,AE\$10:AE\$14,\$O\$10:\$O\$14),AVERAGE(AE\$10:AE\$14))

FORECAST(x, data_y, data_x)

TURNOUT CALC	REG	VOTED	0/6 VOTERS	0 / 6 %	1/6 VOTERS	1 / 6 %	2/6 VOTERS	2 / 6 %	3/6 VOTERS	3 / 6 %	4/6 VOTERS	4 / 6 %	5/6 VOTERS	5 / 6 %	6/6 VOTERS	6 / 6 %
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Then, apply those historic-based percentages to the current total of registered voters in the district.

fx = \$P9*\$S9

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And sum all of them up to get your expected turnout. Use a gut check to ensure it makes sense based off historic and totals. The win number is 51% of that total. Now, let's build that winning program!.

fx =R9+T9+V9+X9+Z9+AB9+AD9

TURNOUT CALC	REG	VOTED	0/6 VOTERS	0 / 6 %	1/6 VOTERS	1 / 6 %	2/6 VOTERS	2 / 6 %	3/6 VOTERS	3 / 6 %	4/6 VOTERS	4 / 6 %	5/6 VOTERS	5 / 6 %	6/6 VOTERS	6 / 6 %
2024	273,942	=R9+T9+V9+X9+Z9+AB9+AD9		%	25,887	9.45%	26,325	9.61%	22,830	8.33%	24,544	8.96%	31,025	11.33%	51,261	18.71%
2020	254,672	218,589	36,577	14.36%	25,654	10.07%	26,260	10.31%	20,838	8.18%	22,373	8.79%	27,345	10.74%	36,577	14.36%
2016	206,769	161,453	25,721	12.44%	16,042	7.76%	16,047	7.76%	16,472	7.97%	18,295	8.85%	21,773	10.53%	47,103	22.78%
2012	178,276	134,101	16,413	9.21%	14,611	8.20%	17,058	9.57%	14,408	8.08%	16,783	9.41%	17,986	10.09%	36,842	20.67%
2008	151,667	126,953	26,330	17.36%	16,833	11.10%	16,790	11.07%	12,125	7.99%	12,482	8.23%	13,969	9.21%	28,424	18.74%
2004	120,571	96,497	22,943	19.03%	12,206	10.12%	11,258	9.34%	9,079	7.53%	10,708	8.88%	10,931	9.07%	19,372	16.07%

III. Break down the electorate and create initial universes

Now that you have a sense of how many people will vote total, it's time to dive deeper into the electorate and really craft your Path to Victory. Yes it's time to build your targeting grid.

So first some definitions, this section will be talking about identifying 3 groups of voters that I'll call "universes." No idea why we use that word, but it works. These universes are Base, Turnout, and Persuasion.

- Your "Base" universe are people who are extremely likely to support you AND are extremely likely to vote even without any outreach or campaigning. They are targets for volunteer recruitment and donation outreach.
- The "Turnout" are voters who are very likely to support you, but less likely to vote without either outreach and campaigning, or just a degree of luck.
- "Persuasion" for these purposes refer to voters who are very likely to vote, but less likely to vote for you without convincing (again, let's be honest, or luck).

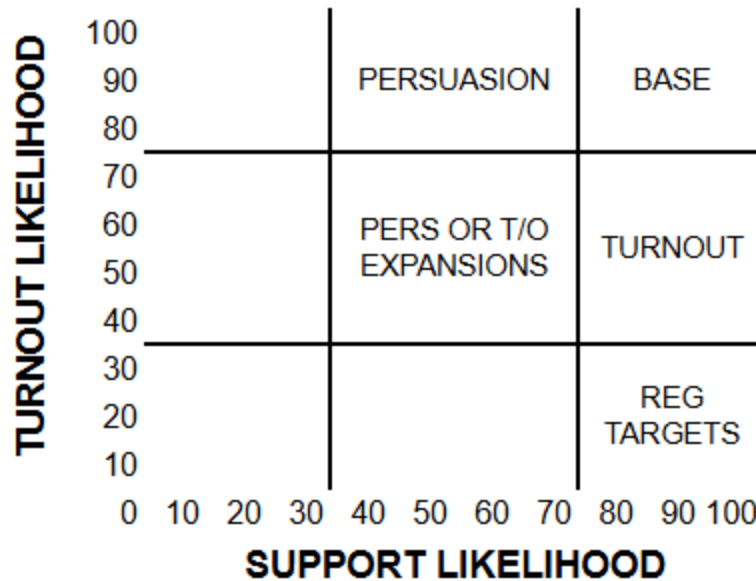
Before we go further, here is the important caveat that - for full disclosure - is at least somewhat controversial: **ALL VOTERS ARE PERSUASION VOTERS.**

Yes, you heard it here, probably not first, but you heard it here. When thinking about a campaign, **all voter outreach is persuasion** - you are always convincing them to support you, whether with their vote or even with their time and money. Even if they were already supporting you before seeing a single ad, or mail piece, or text message, you are going to *persuade* them to take the time to come out and vote. To make a plan (more on vote plan messaging later) to vote.

This may seem like a semantic issue, but it is **critical** framing for your campaign, because it hedges against taking any support or votes for granted. A campaign must earn every vote it receives on Election Day or during early voting, and it is up to the campaign to do the work and persuade voters of all types to cast their votes for them.

Ok, so definitions and soap box out of the way - how do we break out the electorate, and what does this produce for us. What we're building towards is a capacity projection and goals for your field program - how many doors do you want to knock, how many voters do you think you need to contact. Then we're going to put all of this together with the counts, the projections, and your budget to build the backbone of the field program.

So, what does this look like? For this, we use a targeting grid:



Here we are looking at 2 variables: likelihood to support the candidate or campaign, and the likelihood to vote. Thinking of these each on a scale of 0 - 100 (where 0 is basically no chance to support the campaign or vote, and 100 is definitely likely to support or vote), we can create an easy framework to plot out the entire electorate.

And creating a simple tick tac toe board, we can see where the previously mentioned universes would fall on the grid.

The tricky part in these is putting counts for each bucket on the grid, because the campaign has to decide what qualifies a voter as highly likely to support vs not. Which brings us to a brief discussion on statistical modeling. (Fwiw, everything on modeling can also apply as a way to divide up turnout likelihood as well, but you can just use the previous counts on 0/5 voters to 5/5 voters as the scale for turnout likelihood as well).

Modeling

Voter modeling is a relatively recent (at least by my standards, because I'm old) usage of statistics and data to predict different factors about an individual. Now, full disclosure, I'm not a statistician or an econometrician, so don't come looking here for nuanced critique of omitted variable bias in the models or a mathematical breakdown on how models work or anything like that. That's not the point here, nor am I remotely qualified to provide that.

The point is, at a macro / narrative level, modeling takes vast quantities of consumer and commercial data matched against survey and demographic data in order to provide predictive results that can be plotted to an individual. This is where you'll hear stories of "subscribers to car windshield repair magazine are likely to support our candidate" but I do know enough to be able to dispel that myth. Yes, there are large datasets involved in these calculations that may

include whether someone is a subscriber to a particular publication or drives a Ford or whatever, but it's one of thousands of variables, and the variables that are going to be more predictive are more likely to be the macro ones we are more familiar with in punditry analysis - age, race, education level, and party registration.

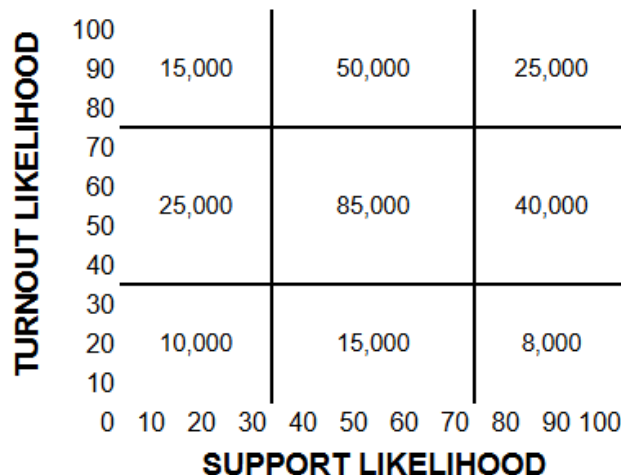
But regardless of which variables are more predictive in a model or the specific regression calculations used to build it, the effect is the same. On the voter file, "scored" voters (i.e. those to whom the model is applied) are given a numerical value, usually 0 - 100 that we can use to create universes. Each model will have model notes somewhere explaining the score range and (ideally) offering cutoff suggestions, but again to brush past the actual statistical nuance, the higher the number the more likely that voter is to support the candidate, to vote, or on an issue model to support the given issue (sorry to all the people who put endless hours and extreme levels of talent into creating these models only for me to generalize them so broadly).

On an average support model, and as reflected on the initial grid above, the most generic cutoffs into buckets are 0 - 30 = "Low" (support likelihood, action likelihood, etc), 30 - 70 = "Medium", and 70 - 100 = "High."

There are numerous cases where this can break down and using models are not optimal: when the model is old (generally anything from previous election cycles), where the model is measuring a different electorate (i.e. voter's likelihood to support a national Democrat vs a Republican applied to candidates in a primary race), or when the scope of the election is different (measuring candidate A vs. B applied to a multi-candidate or ranked choice voting election).

So take this all with those caveats, and know that you can create proxy, non-scientific, models based on campaign polling (i.e. "our campaign polls better with Latino than with white voters, so we'll put frequent voting latinos as our base universe and frequent voting white voters as a persuasion universe) or just with party registration if that's available to you. Dems = 70 - 100, Reps = 0 - 30, everyone else = 30 - 70.

But regardless how you set your modeling cutoffs, once you define them, you can add numbers to your targeting grid:



With these counts, you can determine what the vote deficit is projected to be, use the ratio of persuasion vs turnout vs reg targets to set a proportion of additional votes needed from each bucket, and then use your polling / established knowledge of the race to set performance goals for each bucket.

Dropping this all in a summary table will give you goal sizes for each universe so that you can set your cutoffs and save the actual searches organizers and volunteers will use to create walk lists, call lists, and text lists. Adjust your score cutoffs and modeling criteria from the Tier 1 Persuasion and Turnout buckets as needed to capture voters from the center square / expansion voters until your universes get to the desired size.

PATH TO VICTORY			
EXPECTED TURNOUT	221,537	PERS UNIVERSE	80,749
WIN NUMBER	112,984	T/O UNIVERSE	96,899
BASE	25,000		
DEFICIT	87,984	PERS VOTES	48,449
		T/O VOTES	38,759
PERS PERF GOAL	60.00%	REG VOTES	800
T/O PERF GOAL	40.00%	TOTAL VOTES	88,009
REG	10.00%	+ / - Deficit	25

One final caveat though - not to undercut the importance and attention to detail of everything I just laid out and discussed, but I need to undercut its importance. Despite what many Field or Data Directors would have you believe, targeting numbers and turnout projections are not magic. This is all here to give the campaign and program context to its voter contact programs and allow it to set reasonable and meaningful goals, but that's all it is - context and guidelines. Don't be afraid to adjust the universes and thresholds based on practical considerations. If you can talk to more voters, by all means remember the most basic maxim, the more conversations you have as a field program, the better.

IV. **Look forward and reason backwards - set your goals and structure the program**

As I've (hopefully) emphasized, the point of all this initial work is not to predict the future - there is no precise right or wrong way necessarily to do turnout predictions and create universes. Campaigns are not scientific laboratories created to generate specific predictions - they exist to fulfill the goal of electing a given candidate or slate of candidates or to achieve a specific action. So, the purpose of this planning and legwork is to provide a framework for that more amorphous goal, and to turn it into something more tactile by creating a path to victory.

With that in mind, the next step is to take those campaign wide goals of hitting your win number, and reason backwards to provide monthly and weekly goals for the field program, so you can monitor your progress along the way. Here's a visual representation of how this all looks:

Campaign goal → Turnout projection
Turnout projection → Vote goal
Vote goal → 100% ID goal
100% ID goal → Actual (budgeted) ID goal
ID goal → Voter contact goals (knocks, calls, texts)
Voter contact goals → Volunteer goals
Volunteer goals → Recruitment goals

This may seem like a lot of upfront work, but it provides critical context for the field program overall for both planning purposes upfront and management / performance purposes down the line.

A. Making Your Assumptions

Ok, let's talk about assumptions. Already up to this point we have made a lot of assumptions, but have not really called many of them out because they're pretty universal. We assume vote history is the most important variable to determining future voting habits, we assume there is a finite total universe/electorate that can be divided, etc.

Moving forward, we will need to make a much larger set of assumptions that have a much greater degree of variability. These assumptions will ultimately determine what all of the subsequent field goals will be, so it is important to lay them out clearly in a way that makes them into easy "toggles" that you can use to see the effect on the final product and adjust as needed. Throughout this I'll be using some generic campaign standards based on my experience of what is reasonable or normal, however know that you can and should change these based on turf specifics, knowledge of an existing volunteer base, and in general how aggressive you want to set campaign expectations.

ASSUMPTIONS				
PERS UNIVERSE ID RATE	60.00%			
T/O UNIVERSE ID RATE	80.00%			
		KNOCKS	CALLS	TEXTS
CONTACT RATES		12.00%	5.00%	1.00%
ID DISTRIBUTION		40.00%	50.00%	10.00%
PER SHIFT PRODUCTION METRICS		40	80	1000
SHIFT COMPLETION RATE	0.4			
RECRUITMENT CONVERSION	3			
RECRUITMENT CONTACT RATE	0.05			
CALLS PER RECRUITMENT SHIFT	200			
CAMPAIGN WORKDAYS	150			
ORGANIZER MONTHLY SALARY	\$4,000.00			
REGIONAL MONTHLY SALARY	\$5,000.00			
DEPUTY MONTHLY SALARY	\$6,000.00			
FD MONTHLY SALARY	\$7,000.00			

These assumptions can be thought of in 3 categories: voter program, volunteer program, and operational assumptions.

1. Voter Assumptions: These are questions on how you think voters in your universes will perform. Namely, ID and contact rate.

- a. ID rate = If you contact voters in a given universe, how many of them will be supporters of your candidate/cause? For a persuasion universe this will be somewhere in the ballpark of + / - 50%, in a turnout universe it can be much closer to + / - 90%

- b. Contact rate = If you make a contact attempt on the doors, with a phone call, or text message, what percentage of voters will reply with something beyond a hang up, refusal, or wrong number? Door canvassing will have the highest contact rates, with texting (generally) the lowest, depending on data quality.

Generally speaking the upper limits for reasonability will be approximately 15% on the doors door knocking, 8% for phones, and 5% for texting. You can always set them lower than that, and some volunteers may get lucky with rates above those amounts on certain days / lists, but it's not reliable to count on anything higher than those levels.

2. Volunteer Assumptions: These refer to how your volunteers and the recruitment program will perform.

- a. Shift completion rate = What percentage of volunteers that become scheduled for a shift, on average, will show up to complete it? This has a large degree of variability depending on the campaign. Small campaigns run off a tight network of volunteers very personally connected to the candidate may reasonably expect this to be over 80%, while campaigns with lots of first time or less invested volunteers may see it as low as 20%.
 - b. Per shift production = In a given door knocking, phone calling, or texting shift, how many doors/calls/text attempts will an individual volunteer make to voters? Obviously this is lowest on the doors, generally 40 knocks in a 3 hour shift is a good starting expectation, and highest on text messaging where an individual can send upwards of 1000 or more messages in a single sitting.
 - c. Recruitment conversion rate = How many contacts or conversations between a volunteer prospects and campaign organizer will yield a scheduled shift? Starting at a 3:1 ratio (so every 3 contacts generating 1 shift) is a decent starting point - although having a pre-existing pool of dedicated prospects or quality organizer pitching can improve that significantly.
 - d. Recruitment contact rate = Very simply, as with production contact rates, what percentage of volunteer prospects attempted will answer or reply with something beyond wrong number, hang up, etc. Setting this equal to your phone contact rate isn't bad, although hopefully this will be at least slightly higher since volunteer prospects are more likely to engage with your campaign than a random voter. Theoretically.
3. Operational Assumptions: Finally, assumptions based on campaign logistics, budget, and timeframe.
- a. ID distribution: What percentage of all ID's you collect do you want to get from knocks vs calls vs texts? Face to face ID's from a knock are considered the "strongest" and most valuable, but also take the most work and are the most expensive. At the same time, given the finite number of cell numbers you will have in a given universe and the corresponding response rates, collecting lots of ID's from a texting program has limits as well.
 - b. Campaign workdays: How many days do you have to recruit the volunteers necessary to implement the voter contact program?

Setting it at 150 gives basically 5 months, or a mid-May to mid-October program to account for early voting, GOTV, etc.

- c. Calls per recruitment shift: This can be a standard flat rate that you will set, or it may be covered by a union contract depending on your campaign. Always respect and empower your campaign workers' rights, and make sure whatever you decide upon is an expectation that will yield what the campaign needs to win. 200 calls per day seems to be the standard, union rate, these days.
- d. Salary rates: Also potentially subject to your union contracts, but how much are you expected to pay your field staff per month? Remember final costs will include healthcare and benefits, but as those are often tallied under an operational section of the budget as opposed to the field topline number they don't necessarily need to be included here. If your field topline number (as discussed in section II (A)) *does* include healthcare and benefit costs, make sure that is factored into the estimated monthly costs per person.

B. Setting Your ID Goal

Ok, so now that we have a set of reasonable and very practical assumptions, we are going to do something entirely unreasonable and which will never be used for any day to day purpose in the field program after the field plan is written - calculating the 100% ID goal.

So to explain this. We are ultimately trying to answer the question "how many doors should we knock?" (Also, how many texts to send, etc). And the only truly honest but completely unhelpful response to that question is "as many as possible." Because, again, as mentioned at the very beginning, all of field is based on the idea that the more voters a campaign is able to talk to in as a direct a manner as possible, the better. But, obviously this is unhelpful - there is a finite budget that will yield a certain number of staff and volunteers and resulting voter attempts. But, just projecting field production off the budget topline does not place it in context of the overall goals of the program, and lacks context to what impact that program is making for the campaign. So this offers a balance.

In an ideal world, with an unlimited budget and hiring abilities and volunteer pool, a campaign would ID its entire vote goal. That way, by the time voting starts, all the campaign has ensured it has all of the votes necessary to win. Again, the predictions aren't science, but this would be an incredibly strong position for any campaign, dramatically increasing its likelihood of winning. It would also, in almost all cases, also be an incredibly expensive and time consuming process.

Side note if you are a field director or coordinator reading this, pro-tip: Never ever ever ever ever show the 100% ID goal budget number to your campaign manager, general consultant, or candidate. Pretend it never exists. Burn the spreadsheet where you calculated it after you're done. There is no surer way to give the rest of senior campaign staff and the candidate is to say 500% in your budget after they have already laid that out for/with you. This is for planning purposes only; keep it secret, keep it safe, and keep it to yourself.

Apply the contact rate and ID rate assumptions to get ID's per pass:

22

In subsequent passes, don't forget to factor in shrinkage in the universe size due to ID's collected in previous rounds:

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Drag down the formulas for each contact type and universe until the projected ID totals equal or exceed the vote goal total:

PERSUASION UNIVERSE	PEOPLE	DOORS	PHONES	CELLS	TURNOUT UNIVERSE	PEOPLE	DOORS	PHONES	CELLS
	80,749	60,562	64,599	48,449		96,899	72,674	77,519	58,139
IDS PER PASS 1	6,589	4,360	1,938	291	IDS PER PASS 1	10,543	6,977	3,101	465
IDS PER PASS 2	5,966	3,837	1,841	288	IDS PER PASS 2	9,213	5,860	2,894	459
IDS PER PASS 3	5,413	3,377	1,749	287	IDS PER PASS 3	8,077	4,923	2,701	453
IDS PER PASS 4	4,919	2,972	1,662	286	IDS PER PASS 4	2,968		2,521	447
IDS PER PASS 5	4,477	2,615	1,578	284	IDS PER PASS 5	2,794		2,353	441
IDS PER PASS 6	4,083	2,301	1,500	282	IDS PER PASS 6			2,196	435
IDS PER PASS 7	3,730	2,025	1,425	280	IDS PER PASS 7			2,050	429
IDS PER PASS 8	1,632		1,353	279	IDS PER PASS 8				423
IDS PER PASS 9	1,563		1,286	277	IDS PER PASS 9				418
IDS PER PASS 10	1,497		1,221	275	IDS PER PASS 10				
IDS PER PASS 11	1,434		1,160	274	IDS PER PASS 11				
IDS PER PASS 12	1,374		1,102	272	IDS PER PASS 12				
IDS PER PASS 13	1,318		1,047	270	IDS PER PASS 13				
IDS PER PASS 14	1,264		995	269	IDS PER PASS 14				
IDS PER PASS 15	1,212		945	267	IDS PER PASS 15				
IDS PER PASS 16	1,163		898	266	IDS PER PASS 16				
IDS PER PASS 17	1,117		853	264	IDS PER PASS 17				
IDS PER PASS 18	262			262	IDS PER PASS 18				
TOTAL PROJ. IDS	49,013	21,487	22,553	4,973	TOTAL PROJ. IDS	39,545	17,760	17,816	3,970
VOTE GOAL	48,449	21,802	21,802	4,845	VOTE GOAL	38,759	17,442	17,442	3,876

Reverse engineer the ID's per pass in order to determine the total number of attempts (knocks, calls, texts) needed at contact rates to generate the ID totals.

577,760									
=((E\$3*counta(E\$4:E\$21))*0.9)+((L\$3*counta(L\$4:L\$21))*0.9)									
COUNTA(value1, [value2, ...])									
PERSUASION					TURNOUT				
UNIVERSE	80,749	60,562	64,599	48,449	UNIVERSE	96,899	72,674	77,519	58,139
IDS PER PASS 1	6,589	4,360	1,938	291	IDS PER PASS 1	10,543	6,977	3,101	465
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VOTE GOAL	48,449	21,802	21,802	4,845	VOTE GOAL	38,759	17,442	17,442	3,876
RECRUITMENT TOTALS					ASSUMPTIONS				
PEOPLE	82,608	577,760	1,476,739	1,255,809	PERS UNIVERSE ID	60.00%			
COMPLETED SHIFTS	34,159	14,444	18,459	1,256	T/O UNIVERSE ID F	80.00%			
SCHEDULED SHIFTS	85,398	36,110	46,148	3,140			KNOCKS	CALLS	TEXTS
RECRUITMENT CONTACTS	256,193	108,330	138,444	9,419	CONTACT RATES		12.00%	5.00%	1.00%
RECRUITMENT DIALS	5,123,855	2,166,598	2,768,885	188,371	ID DISTRIBUTION		45.00%	45.00%	10.00%
DAYS OF RECRUITMENT	25,619	10,833	13,844	942	PER SHIFT PRODUCTION METRIC		40	80	1000
ORGANIZERS REQUIRED	171	72	92	6					
REGIONALS REQUIRED	28	12	15	1	SHIFT COMPLETION	0.4			
DEPUTIES REQUIRED	9	4	5	0	RECRUITMENT CO	3			

Apply the recruitment and volunteer assumptions to yield the total expected number of recruitment dials needed to schedule the needed shifts:

36,110									
=E27/\$K\$33									
RECRUITMENT TOTALS					ASSUMPTIONS				
PEOPLE	82,608	577,760	1,476,739	1,255,809	PERS UNIVERSE ID RATE	60.00%			
COMPLETED SHIFTS	34,159	14,444	18,459	1,256	T/O UNIVERSE ID RATE	80.00%			
SCHEDULED SHIFTS	85,398	=E27/\$K\$33	46,148	3,140			KNOCKS	CALLS	TEXTS
RECRUITMENT CONTACTS	256,193	108,330	138,444	9,419	CONTACT RATES		12.00%	5.00%	1.00%
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DAYS OF RECRUITMENT	25,619	10,833	13,844	942	PER SHIFT PRODUCTION METRICS		40	80	1000
ORGANIZERS REQUIRED	171	72	92	6					
REGIONALS REQUIRED	28	12	15	1	SHIFT COMPLETION RATE	0.4			
DEPUTIES REQUIRED	9	4	5	0	RECRUITMENT CONVERSION	3			
					RECRUITMENT CONTACT RATE	0.05			
100% ID GOAL PROJ COST	\$4,517,208.16	\$1,900,681.72	\$2,419,317.73	\$197,208.72	CALLS PER RECRUITMENT SHIFT	200			
ACTUAL CAPACITY BUDGE	\$895,449.00				CAMPAIGN WORKDAYS	150			
ESTIMATED ID GOAL	19.82%				ORGANIZER MONTHLY SALARY	\$4,000.00			
					REGIONAL MONTHLY SALARY	\$5,000.00			
					DEPUTY MONTHLY SALARY	\$6,000.00			
					FD MONTHLY SALARY	\$7,000.00			

Apply the operational assumptions of campaign workdays and salary levels to generate the projected cost of a 100% ID program (remember, this is the internal number that you don't need to share with anyone :))

$= ((\$K\$37/30)*E32*\$K38) + ((\$K\$37/30)*E33*\$K39) + ((\$K\$37/30)*E34*\$K40) + ((\$K\$37/30)*\$K41)$									
	B	D	E	F	G	H	I	K	N
RECRUITMENT TOTALS	PEOPLE	KNOCKS	CALLS	TEXTS	ASSUMPTIONS				
	82,608	577,760	1,476,739	1,255,809	PERS UNIVERSE ID RATE	60.00%			
COMPLETED SHIFTS	34,159	14,444	18,459	1,256	T/O UNIVERSE ID RATE	80.00%			
SCHEDULED SHIFTS	85,398	36,110	46,148	3,140			KNOCKS	CALLS	TEXTS
RECRUITMENT CONTACTS	256,193	108,330	138,444	9,419	CONTACT RATES		12.00%	5.00%	1.00%
RECRUITMENT DIALS	5,123,855	2,166,598	2,768,885	188,371	ID DISTRIBUTION		45.00%	45.00%	10.00%
DAYS OF RECRUITMENT	25,619	10,833	13,844	942	PER SHIFT PRODUCTION METRICS		40	80	1000
ORGANIZERS REQUIRED	171	72	92	6	SHIFT COMPLETION RATE	0.4			
REGIONALS REQUIRED	28	12	15	1	RECRUITMENT CONVERSION	3			
DEPUTIES REQUIRED	9	4	5	0	RECRUITMENT CONTACT RATE	0.05			
100% ID GOAL PROJ COST	\$4,517,208.16	$= ((\$K\$37/30)*E32*\$K38) + ((\$K\$37/30)*E33*\$K39) + ((\$K\$37/30)*E34*\$K40) + ((\$K\$37/30)*\$K41)$					200		
ACTUAL CAPACITY BUDGET	\$895,449.00				CAMPAIGN WORKDAYS		150		
					ORGANIZER MONTHLY SALARY		\$4,000.00		
					REGIONAL MONTHLY SALARY		\$5,000.00		
					DEPUTY MONTHLY SALARY		\$6,000.00		
					FD MONTHLY SALARY		\$7,000.00		
ESTIMATED ID GOAL	19.82%								

Use the capacity budget to compare against the 100% ID goal to give you the actual expected ID goal (round this off to a nice, even number). This also gives you another frame of reference to your assigned budget number - this is ideally going to fall somewhere in the range of 10% - 40%. If it's higher than that, the campaign is opting for a **very** field heavy strategy, and less than that, a very field light strategy. Not that either is necessarily wrong, but useful context to have during budget discussions.

RECRUITMENT TOTALS	PEOPLE	KNOCKS	CALLS	TEXTS
	82,608	577,760	1,476,739	1,255,809
COMPLETED SHIFTS	34,159	14,444	18,459	1,256
SCHEDULED SHIFTS	85,398	36,110	46,148	3,140
RECRUITMENT CONTACTS	256,193	108,330	138,444	9,419
RECRUITMENT DIALS	5,123,855	2,166,598	2,768,885	188,371
DAYS OF RECRUITMENT	25,619	10,833	13,844	942
ORGANIZERS REQUIRED	171	72	92	6
REGIONALS REQUIRED	28	12	15	1
DEPUTIES REQUIRED	9	4	5	0
100% ID GOAL PROJ COST	\$4,517,208.16	\$1,900,681.72	\$2,419,317.73	\$197,208.72
ACTUAL CAPACITY BUDGET	\$895,449.00			
ESTIMATED ID GOAL	20.00%			

C. Determining Your Voter Contact Goals

Alright, one more step and you'll be ready to onboard your team and get them going on executing all of these spreadsheets you have so lovingly built by now.

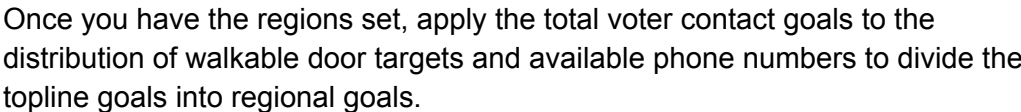
Using the assumptions you have already made, use the actual ID goal in order to determine the actual production goals, and divide that out by month and turf. Working off your previous calculations and assumptions, use the actual ID goal to generate expected number of door attempts, call attempts, shifts required, and recruitment attempts.

VOTER CONTACT OVERVIEW	MAY	JUNE	JULY	AUGUST	SEPT	OCT	TOTAL PRE GOTV
Recruitment Dial Goal	139,500	189,000	260,400	279,000	315,000	325,500	1,508,400
Recruitment Contact Goal	13,601	18,428	25,389	27,203	30,713	31,736	147,070
Recruited Shift Goal	6,801	9,214	12,695	13,601	15,356	15,868	73,535
Canvass Attempt Goal	0	103,655	142,813	153,014	172,758	178,516	750,756
Canvass Contacts Goal	0	18,658	25,706	27,543	31,096	32,133	135,136
Canvass Shift Goal	0	2,073	2,856	3,060	3,455	3,570	15,014
Phone Dial Goal	0	69,103	95,209	102,009	115,172	119,011	500,504
Phone Contact Goal	0	5,528	7,617	8,161	9,214	9,521	40,041
Phone Shift Goal	0	691	952	1,020	1,152	1,190	5,005
Total Attempts Goal	0	172,758	238,022	255,023	287,930	297,527	1,251,260
Total Contacts Goal	0	24,186	33,323	35,704	40,310	41,654	175,177
Total Shifts	0	2,764	3,808	4,080	4,607	4,760	20,019
Shifts/Vol	0	1.25	1.45	0.17	1.85	2.00	1.34
Total Active Volunteers	0	2212	2627	24728	2491	2380	34438

This is also your chance to use the initial analysis done on the district to decide what geographies make sense for dividing up the staff assignments. A team of organizers managed by a single Regional Director is considered a region, and will manage a subset of specific geographic boundaries. Considerations for dividing up districts into regions include:

- A. Physical geography: Considering that volunteers and organizers will go out canvassing from an office in a region, it should be as physically compact and accessible as possible. Rivers, hills, highways, and main thoroughfares / highways can all be good markers to divide a district.
- B. Political geography: County lines, city lines, local district boundaries are all good considerations to take into account when creating regions. If your campaign is going to work with other political campaigns in the area, it makes sense to try and keep those other districts within as few regions as possible to make coordination and cooperation easier.
- C. Community boundaries: These can be official or semi official markers like established neighborhood lines, or unofficial markers surrounding a given ethnic, linguistic, industry, or other commonality like university districts or areas with high LGBTQ+ populations. It is not required to keep these communities together, but it is often an important sign of outreach and

D. Reasonability factors: Oftentimes there will be parts of a district that are, for one reason or another, inaccessible - especially to canvassers. Generally these are going to be highly rural or undeveloped areas, but depending on the turf could be areas covered by another campaign or a paid canvass, or have legally restricted access like a military base. It can make sense to assign these areas to a specific region, or just a region for planning purposes with no staff assigned to help calculate good knock goals on a regional level.



REGION	JUNE TOTAL KNOCKS	JULY TOTAL KNOCKS	AUGUST TOTAL KNOCKS	SEPT TOTAL KNOCKS	OCT TOTAL KNOCKS	TOTALS
StL	9044	12266	16355	16958	20443	75066
NE	20252	27467	36622	37973	45778	168092
SE	20755	28149	37532	38915	46915	172266
KC	13621	18473	24631	25539	30789	113053
GKC	12601	17090	22787	23627	28484	104589
MM	8531	11571	15428	15997	19285	70812
SW	8344	11316	15089	15645	18861	69255
TOTALS	93148	126332	168444	174654	210555	773133

Then break the regional goals out by month, ramping them up throughout the year in line with your staffing timeline and production abilities (i.e. earlier months have lower share of the monthly goal distribution to compensate for new staff learning best practices and building a reliable volunteer base).

St. Louis City	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	TOTALS
KNOCKS	9044	12266	16355	16958	20443	75066
CANVASS SHIFTS	181	245	327	339	409	1501
PHONES	18004	27092	36101	45002	54030	180229
PHONE SHIFTS	150	226	301	375	450	1502
Total Shifts	331	471	628	714	859	3003

XI. Building the team - roles & responsibilities

A. Staff roles

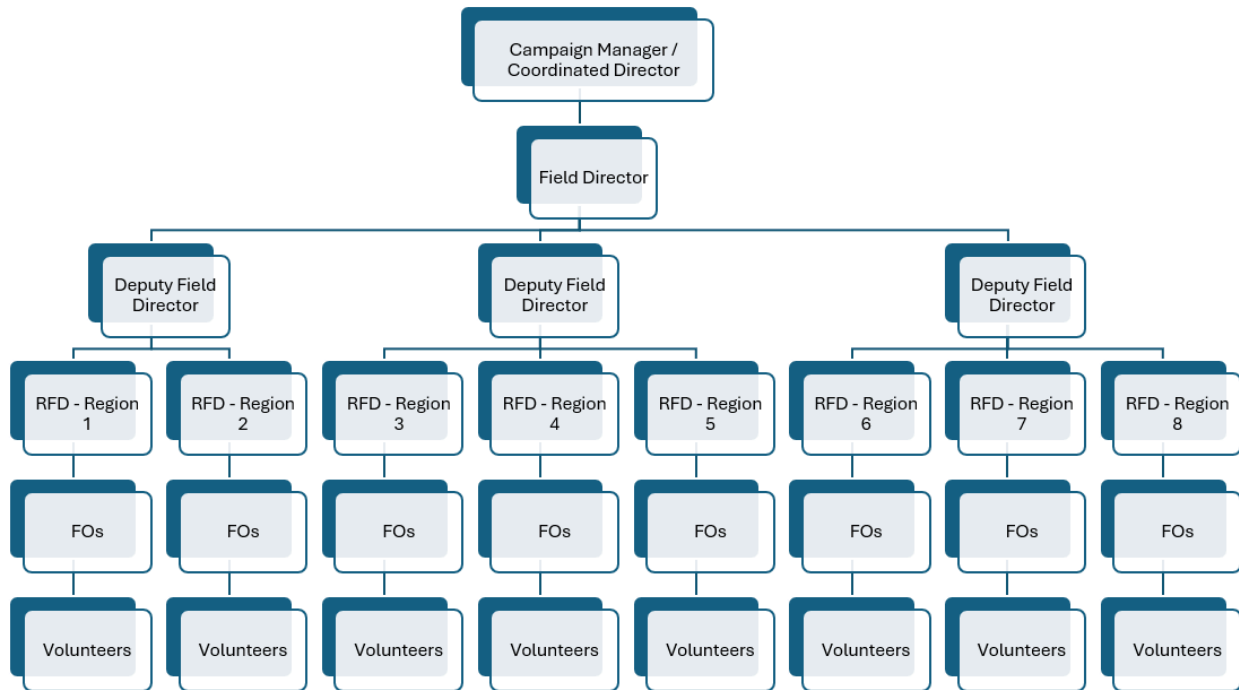
Alright, you have your field plan - your budget and goals - now it's time to hire the team to execute it! Now it's important to state up front that not all campaigns need to fill every possible field role - many won't need anything more than a few organizers and a field director, some just need a single field director. The roles listed below are descriptions as they would likely be seen for a statewide campaign like a contested U.S. Senate race. Presidential races could have even more roles to fill.

Controversy caveat: I'm purposely not listing out various support roles for distributed teams, college teams, GOTV teams, or (most controversial) data teams. While certain turf by nature of the area and targets it covers be more of a "college" organizing role or GOTV focus, I caution against explicit labels like that. Campaigns tend to over specialize and over label responsibilities when at the end of the day, everyone on field has the same role - recruit and train people to have quality conversations with voters. Whether those people are college students or live in a neighborhood dense in a specific ethnic, or whether they are volunteering remotely, they're still all doing the same work for the same purpose. Adding additional titles leads to more bureaucracy and likelihood for ego to get in the way of productivity, without any discernible benefit.

Specifically on the lack of a data team, everything discussed in this guide, from calculating vote goals to pulling universes to creating walk lists and daily reports is data work that can be done by the field team itself. That's one of the reasons why I'm offering such a detailed look at example spreadsheets and screenshots from previous campaign plans - to walk through those steps to show how manageable it is. Data teams can have a role to play supporting all that, but there is incredible value that can be missed by over reliance on them. Having regionals pull walk lists, deputies pull reports, and field directors pull universes mean there are additional eyes on the final product from the people who can best spot potential problems. A regional could pull a walk list and see instantly "oh, this list contains a gated community or a somewhat rougher area, I better set it aside for a specific volunteer I know can handle it." A deputy pulling a report would see low knocks per shift for a region and know right away "yeah, they had an office opening right after this, must have cut into the end of the canvass."

And so forth. Big picture to this caveat being that the more you can keep with the field team itself the more room you end up giving them to succeed, grow, and exceed their goals.

So soap box over, here are some basic descriptions of the basic roles you are likely to see on a standard field campaign:



Field Director -

General Job Description: The Field Director will supervise all field staff and will be responsible for executing all direct voter contact programs. Additionally, the Field Director will be responsible for all data management – targeting, voter file admin, and reporting – needed for the campaign.

Reports to: Campaign Manager.

Deputy Field Director -

General Job Description:

Deputy Field Director will supervise Regional Field Directors and Field Organizers to execute the Field Plan as laid out by the Field Director. DFD will be responsible for ensuring all staff is properly trained, that daily, weekly, and monthly goals within their regions are met and exceeded, and that all given priorities are being executed. Deputies will also assist the Field Director in tracking the field program's progress through regular daily, weekly, and monthly reporting of capacity, productivity, and universe penetration and performance.

Specific Day to Day Responsibilities:

- Oversee the Regional Field Directors, monitoring their regions' progress to goal, the performance of all organizers, and their production.
- Track the volunteer recruitment of all organizers and supervise all organizer training, pitch development, coaching, and volunteer management practices.

- Serve as the Statewide Internship Coordinator, developing the Internship Program, and ensuring that all RFD's and FO's are properly trained in interviewing, onboarding, and managing their assigned interns.
- Assist the Field Director with generating assigned daily campaign reports to track the field program's success and monitor areas of improvement, recommending and implementing solutions in rapid response to ensure maximum productivity of all direct voter contact activities.

Reports to: Field Director.

Regional Field Director -

General Job Description:

Regional Field Directors will supervise Field Organizers within their region. RFDs will be responsible for ensuring that all staff is properly trained and consistently productive, that daily, weekly, and monthly goals within their region are met and exceeded, that all given priorities are being executed, that all required reporting is accurate and timely, and that all regional data is entered on time.

Specific Day to Day Responsibilities:

- Monitor the volunteer recruitment, management, and retention of the field organizers in their region.
- Act as the Internship Coordinators for their region – working with the Field Director and Deputy Field Director to execute the Internship Program as specified in the Field Plan and in day to day priority communications.
- Track progress to goal and other metrics within their region and work to build on the margins and improve the efficiency/productivity of the campaign.
- Maintain a canvass tracker and progress to pass completion report for their region, monitoring priority turf and assigning canvassers to the appropriate areas.
- Make a minimum of 200 volunteer recruitment calls per week.

Reports to: Deputy Field Director.

Field Organizer -

General Job Description:

Field Organizers are required to recruit and train volunteers to do direct voter contact. Organizers will be given daily, weekly, and monthly goals for capacity building and volunteer productivity and will be expected to meet and exceed all given goals. Organizers will be responsible for preparing canvass and call materials, entering data accurately and on time, and making sure all required reporting is accurate and timely. Additionally, some Field Organizers may be selected to take on additional responsibilities within their region such as internship or confirmation coordinators.

Specific Day to Day Responsibilities:

- Make an absolute minimum of 200 volunteer recruitment calls per day
- Participate in recruitment training sessions with their Regional Field Director or other assigned field staff.
- Train, launch, and manage volunteer canvasses and phonebanks in their assigned office/region.
- Hold assigned satellite canvasses to ensure full penetration of the canvass universe within their region.
- Organize assigned “volunteer appreciation” or other special Direct Voter Contact events as assigned by senior campaign staff.
- Prepare all canvass and phonebank materials every night.
- Oversee and maintain data integrity within their office – enter all daily direct voter contact and volunteer recruitment data into VAN by the end of the day.
- When needed, Organizers will be expected to participate in canvasses as well, on average expecting to knock 200 doors per week.

Reports to: Regional Field Director

B. Volunteer roles

In addition to the staff roles, many campaigns will also rely on volunteers to fill leadership positions within the field department as well. This is not required, but can help expand the capacity of the program when the capacity of a single organizer grows beyond what they can reasonably manage themselves. These roles are most often filled during GOTV as part of staging location management (more on that later), but were most famously implemented early in the 2008 Obama campaign due to the huge capacity seen in many field offices and organizer turfs during that time.

These roles can include:

Staging Location Directors

The most highly dedicated and well trained volunteers responsible for overseeing an assigned staging location, collecting and reporting numbers, and passing down directives from Regional Field Directors or Field Organizers. Staging Location Directors may double up on other roles as needed depending on the capacity in their assigned staging location. Staging Location Directors must have a direct line where they can be reached at all times that is not an office main line.

Confirmation Coordinator

Responsible for volunteer in-take/out-take, confirmation calls, flake chasing, and reschedules.

Canvass Captain

Responsible for canvass in-take/out-take, canvass trainings, making sure precincts are canvassed in order of priority, and (when applicable) strikethroughs.

Phone Captain

Responsible for ensuring all phone callers and texters have the necessary materials and training.

Runners

Each may need multiple runners. These individuals are in charge of running logistics in the region, in addition to running logistics to the local staging locations as needed. They are on call to help distribute supplies, drive canvassers, and give rides to the polls on Election Day.

Comfort Volunteers

Responsible for food and care of volunteers in the region. Ideally they should be tasked with providing meals for GOTV to increase productivity.

C. Hiring and recruitment

Once you've settled on your staff structure, the next job is filling it - and hiring for field is its own skill, distinct from anything else on this list.

For paid staff (Field Directors, Deputy Field Directors, Regional Field Directors, Organizers), you're mostly filling on referral and network - former organizers, campaign alumni networks, local Democratic Party contacts, and college politics departments are your best sources, supplemented by posting on campaign job boards. Screen for the things a resume can't fake: has this person actually cold-called strangers before, are they comfortable with rejection, and have they organized something real (a campus group, a union drive, a community project)?

That track record tends to outproduce a stronger-looking resume with no comparable experience. Don't be shy about asking a candidate to do a mock recruitment call or a mock canvass conversation on the spot in the interview - it tells you more in five minutes than a resume tells you in five pages.

For your volunteer-facing capacity - interns and fellows - you need volume, and volume needs a defined pipeline, not an ad hoc process. A workable model looks like:

Applications come in through an online form, campus recruiting, referral, or a direct call, and get uploaded/coded into VAN daily so nobody falls through the cracks.

An Internship or Volunteer Coordinator (see roles above) works the uncontacted-prospects list a minimum of 3x per day until every applicant is either scheduled for an interview or has been genuinely exhausted as a contact.

Interviews happen in person where possible (phone as the fallback), run short (15-20 minutes), cover the applicant's background and interest, and close with a direct offer - a field program that's short on capacity should almost never be turning away a willing body. Set a rule for the rare exception (e.g. "no applicant is turned away except with explicit sign-off from the Field Director") so the exception stays an exception.

Once accepted, new interns/fellows sign the handbook, get a schedule, and are onboarded (see Volunteer Management above) before their first shift.

Track this pipeline the same way you track voter contact - applicants received, interviews scheduled, interviews completed, accepted, and active-but-unscheduled - on a daily or weekly report (more on this in Data & Reporting). Hiring is a numbers game exactly like voter ID is, and it deserves the same rigor.

D. Operations and employment considerations

Somebody has to keep the lights on, the paychecks correct, and the campaign compliant, and that job usually falls to the Field Director or a designated operations lead. A few things every campaign needs to nail down before staff show up on day one:

Pay periods & payroll: decide your pay schedule (bi-weekly is standard) and stick to direct deposit - it's faster, cheaper, and leaves a cleaner paper trail than paper checks.

New hire paperwork: every new staffer completes a hiring packet on day one (W-4, I-9, direct deposit form with a voided check, offer letter) before they touch a phone or a walk list. Designate one person or inbox responsible for collecting and reviewing these so nothing sits incomplete for weeks.

Health care & benefits: if your budget includes staff health coverage, get enrollment/waiver paperwork out and signed on day one too - coverage should be effective from date of hire, not whenever the paperwork eventually surfaces.

Expense reimbursement: require prior approval for any purchase, an original (or scanned) receipt, and a fully filled-out form; set and enforce a submission deadline (30 days is standard) so unreimbursed expenses don't linger into the campaign's final accounting.

Gas/mileage: prepaid gas cards are cleaner than mileage reimbursement for staff driving turf regularly - fewer receipts to lose, and an easy weekly balance check.

Equipment: every campaign phone, laptop, and hotspot should be logged to a specific staffer or office and tracked. A lost burner phone is a data-security problem, not just a \$30 problem - treat it that way. Sign-out sheets solve most of it.

Worker's compensation: any injury requiring medical attention gets reported to the Field Director immediately, with the details documented, full stop.

Supply requests: build a lightweight process (a form, a standing email) so offices can request supplies before they run out rather than after - waiting for people to notice they're empty is how you end up staging a canvass with no clipboards.

None of this is glamorous, but a field program that trips over its own payroll or reimbursement process bleeds staff morale fast, and a distracted, unpaid organizer is not a productive one.

XII. Volunteer recruitment - goals, universes / data, confirmations, and pitching

A. Breaking program goals into turf and individual goals

We covered getting your topline field goals - shifts, dials, knocks - in the “Look forward and reason backwards” section above; the next step is turning that topline into something an individual staffer can actually be held to.

Blanket goals are lazy, and they let people hide. The whole point of an individual goal is that it reflects what a specific person, on a specific piece of turf, with a specific track record, can and should be doing. Build individual goals off the same building blocks as your regional goals:

Their share of turf/universe: what fraction of the region's remaining universe, doors, or dial list belongs to this person or this office?

Their track record: what has this person's shift-completion rate, contact rate, and knocks/dials-per-shift actually been? Don't set a goal off an assumption when you already have real production data to use instead.

Time remaining: how many workdays are left in the cycle, and how should the goal ramp as the program matures - lower expectations in month one while someone is learning, higher by GOTV?

A good individual goal is clear, fair, and aggressive: clear enough that there's no ambiguity about what's expected (a number and a date, not “about 10-ish shifts this week”), fair in that it reflects what this specific person is actually capable of, and aggressive in that it still asks them to stretch. And a goal that isn't communicated might as well not exist - tell people their goals more than once and in more than one format (say it out loud, put it in writing, post it on the wall) so there's no excuse for anyone not knowing exactly what's expected of them today.

Once goals are set, enforce them the same way you enforce voter contact goals: check progress daily rather than waiting for the weekly report to discover someone's behind, know why someone is or isn't hitting their number, and adjust the goal itself if the underlying assumptions (turf size, contact rate) turn out to be wrong - not as an excuse to lower the bar, but because a goal built on a bad assumption isn't actually measuring performance.

B. Volunteer tiers, universes, and data

Volunteer recruitment universes are divided up into different tiers based on different criteria, and each have different requirements for how often they must be called.

Tier 1 – Volunteers who have completed shifts on the campaign that haven't been rescheduled for future shifts. Call 3x per day.

Tier 2 – Prospects with “Vol Yes” as their most recent response to the volunteer survey question, plus people who last said “Vol Maybe” over two weeks ago.

Tier 3 – Prospects who have signed up for a shift but have never completed one.

Tier 4 – High partisan scorers on TargetSmart’s Partisanship Model, plus any other suitable prospects on the file.

C. Call time management

Recruitment dial time is exactly like a voter contact shift - it needs a start time, an end time, a hard target, and active in-shift management, or it will quietly evaporate into “getting to it eventually.”

Set a daily dial minimum for every staffer doing recruitment, and let it graduate over the course of the program as your goals ramp (e.g. 250 dials/day early in the cycle, climbing to 300, then 350 as GOTV approaches). An RFD/DFD can push an individual’s number up if their turf or role calls for it, but nobody should fall below the campaign-wide floor.

Post benchmarks, not just a goal. A daily target only means something if people know whether they’re on pace at any given moment during the shift. Post a simple benchmark schedule in every office - for a 300-dial day, something like 50 dials by noon, 125 by 3pm, 175 by 6pm, goal by the end of call time - so organizers can self-correct instead of finding out they’re behind at 8:45pm.

Show the math behind the number. Dial goals feel arbitrary unless people can see the line from dials to votes: X dials yields roughly Y contacts at your measured contact rate; Y contacts at your contacts-per-shift ratio yields Z scheduled shifts; Z shifts at your completion/flake rate yields the actual votes that dial goal is worth. Posting that chain next to the benchmark (literally, e.g. “300 DIALS = 100 VOTES”) turns an abstract quota into a visible reason to keep dialing.

Protect the block of time itself. Call time only works if it’s actually protected time - a fixed daily window (not “whenever things are slow”), phones as the only priority during it, and a real end time so people know exactly how long they need to sustain the pace.

Report out of it. At minimum, staff should self-report their numbers at set check-in points during call time and again at the end (more on how this feeds your regional reporting docs in Data & Reporting). A dial goal nobody checks on until the next morning isn’t really being managed - it’s being hoped for.

D. Confirmations and flake chasing

The purpose of a field program is to recruit a massive volunteer base to engage in direct voter contact. However, even if you recruit 1,000,000 volunteers, it would do the campaign no good unless they actually show up and complete their shifts. The confirmation and flake procedure is designed to fight the flake rate, so that we have the robust and active DVC program necessary for victory.

Confirmation/Flake Schedule:

Pre-Call Time:

SEND CONFIRMATION TEXTS TO EVERYONE
SCHEDULED/CONFIRMED TODAY

10:00 AM – Round 1 of SAME DAY CONFIRMS

Round 1 of NEXT DAY CONFIRMS)

10:15 AM – Round 1 of FLAKE CHASING

11:15 AM – Round 2 of FLAKE CHASING

11:30 AM – Round 2 of SAME DAY CONFIRMS

Round 2 of NEXT DAY CONFIRMS

1:00 PM – Round 3 of SAME DAY CONFIRMS, Round 3 of NEXT DAY
CONFIRMS, Round 1 of 2 DAY OUT CONFIRMS

1:15 PM – Round 3 of FLAKE CHASING

2:15 PM – Round 4 of FLAKE CHASING

3:00 PM – Round 4 of NEXT DAY CONFIRMS

Round 2 of 2 DAY OUT CONFIRMS

4:15 PM – Round 5 of FLAKE CHASING

5:00 PM – Round 5 of NEXT DAY CONFIRMS

Round 3 of 2 DAY OUT CONFIRMS

Round 1 of 3 DAY OUT CONFIRMS

6:15 PM – Round 6 of FLAKE CHASING

7:00 PM – Round 6 of NEXT DAY CONFIRMS

Round 4 of 2 DAY OUT CONFIRMS

Round 2 of 3 DAY OUT CONFIRMS

8:15 PM – Round 7 of FLAKE CHASING

9:00 PM – Call time ends

Post-Call Time:

SEND CONFIRMATION TEXTS AND EMAILS FOR THE NEXT DAY

E. Pitching & direct recruitment

A good pitch not only allows you to schedule more shifts but also sets the tone for what a volunteer should expect when they come in for their shift. A good pitch will lead not only to more volunteer shifts recruited but also harder shifts, fewer flakes, and more dedicated, motivated volunteers. Crafting your pitch begins with the mentality that every supporter you talk to WILL come in to volunteer if pitched the right way.

The Six Pitch Commandments:

- **Tone:** Tone is crucial. Content is huge, but content has no impact if delivered in a dry, boring, condescending or overly cheesy way. People are more likely to volunteer if they genuinely like the sound of the person they are talking to on the other end of the phone. You should pitch enthusiastically and with sincerity. You should also be confident. People are much more willing to speak to you when you're confident, and you have every reason to be – the worst the person on the other end can say is no.
- **Urgency:** Every single pitch, whether it's an initial pitch or a repitch, should have a line of urgency that's compelling and explains to the person being pitched why this activity is important, and why it's important right now. Good lines of urgency generally provide context about the state of the race and how it'll come down to talking to voters, and why the person being pitched is essential to the solution.
- **Specificity:** To begin with, a specific date, time, and activity must be pitched and repitched as the essential part of any hard ask. One or two of the above is not enough – without pitching all three of these at once, the volunteer can shut down an organizer's pitch entirely. Secondly, you should be perpetually aware of the language you use. This is the easiest and quickest thing to correct. Soft language= soft commitments= soft shifts= flakes. "Can I count on you?" "Will you be there?" "Right at 10am" "You will be knocking doors." NOT, "Do you think you might be able to come in?" "Are you interested in?" "Some time in the morning." "Do some volunteering." Direct asks get more shifts and harder shifts.
- **Objection Response – Feel/Felt/Found:** You will almost certainly be told no the first time you ask any volunteer prospect to do anything. The only way to recruit enough shifts to win is to overcome these objections. Objection response can take many forms, but the most formulaic and effective is Feel/Felt/Found.
 - **Feel:** Identify with the volunteer. Say that you understand why they feel that way and validate their objection.
 - **Felt:** Express to them that you used to feel the same way, or tell them a story of someone you know feeling the same way at one point. This will help you transition into responding to their objection.
 - **Found:** While you used to feel this way, after you looked at it you found that the opposite was true. This allows you to validate their opinion, agree with it, and then show them why it's incorrect and thereby provide a counter to any objection that they have.

- Personalize and Connect—Listen for openings or insights into people’s lives and open up about your own. If someone says they can’t volunteer on Saturday because they have to watch their grandkids, ask how old they are. Take any opening possible to connect. The best recruitment calls always involve talking about something that doesn’t involve the election for a minute or two, so that the person on the other end of the phone gets comfortable with you. Then, the connection you’ve made will serve as a jumping off point to a second and third ask. This will produce more shifts and begin the process of establishing a strong personal relationship that will lead to high production and reschedules.
- Multiple Pitch — Ask multiple times. Never end on a no and never end on a yes. Reframe the ask each time by reinforcing/repeating the expression of urgency. Refuse to take “no” for an answer. There’s rarely good reason to take “no” for an answer. Go through the full list of asks... Get SOMETHING from every conversation with a supporter.

Everyone must have the list of pitches memorized, and they need to understand that this is a list of pitches, not a list of asks. Every time an intern or lead goes to the next item on the list, they must re-pitch it, to underline the importance and urgency of each one.

Will you...

CANVASS
 CANVASS
 CANVASS
 CANVASS
 PHONEBANK
 PHONEBANK
 TEXTBANK
 OFFICE WORK
 OFFICE SUPPLIES
 COMFORT VOLUNTEER

XIII. Volunteer management & training - canvassing, phonebanking, texting, relational

A. Growing your active volunteer base - they stay for you

Recruiting a volunteer and getting them in the door once is the easy part — the real measure of a field program is whether they come back. The saying to live by here is: the volunteer comes for the candidate, but stays for you. People will show up once out of genuine belief in the cause, but a second, third, and tenth shift almost always comes down to whether they felt welcomed, valued, and like part of something, not just processed and sent out the door.

That starts the moment they walk in — greet every volunteer enthusiastically, thank them for coming, and make sure they're never left standing around without a task or a person checking in on them. It continues through the shift (organizers should never "abandon" a canvass or phonebank once it's launched — see below) and past it, with a genuine thank-you and an ask to come back. Building this into a repeatable habit matters more than any single gesture: hold regular volunteer appreciation events (aim for at least bi-monthly per office) that pair something fun — a potluck, a themed morning, a team competition — with actual direct voter contact, so the appreciation reinforces the mission rather than distracting from it.

Track this the same way you track voter contact. Active volunteer retention is a real, reportable metric (more in Reporting and Monitoring below), and a shrinking active volunteer base is a leading indicator of a program in trouble long before a missed knock goal shows up.

B. Office management and flow

A well-run field office runs on a few non-negotiable habits, all designed to protect volunteers' time and the integrity of the day's data:

1. Sign-in is a bottleneck, not a formality. Every volunteer, regardless of activity or whether you already have their information, signs in completely on a standardized form before being taken anywhere else. No one should be able to wander into a canvass training or phonebank without going through it.
2. Flip shift statuses fast. Within 15 minutes of sign-in, every volunteer's shift status must be updated in VAN so that flake-chasing calls can begin on anyone who was expected but hasn't shown. Stragglers get flipped the moment they arrive.
3. Make progress visible. A canvass tracker, goal thermometer, and leaderboard should be clearly posted and kept current in every office — people work harder toward a goal they can see.
4. Keep functions physically separated. Data entry should be sequestered away from phonebankers and canvassers, with clearly labeled intake boxes (volunteer call data, intern call data, walk data, goal sheets, etc.) so nothing gets mixed up. A dedicated training area, with the script and

talking points posted in large print, means anyone can run a training without hunting for materials.

5. Track your equipment. Every campaign phone should be labeled, logged to a specific office, and accounted for at the end of each day — a missing phone is a data problem, not just a supply problem.

C. Rescheduling and follow ups

No volunteer should ever leave the office without being scheduled or rescheduled for their next shift — this is not optional, and it's the single highest-leverage moment in the entire volunteer lifecycle, because it's far easier to get a "yes" from someone standing in front of you than to reach them cold later.

Use a standing volunteer calendar, filled out as far as two months in advance where possible, that always includes the volunteer's contact information and a clear record of the days/shifts they've committed to. Keep two copies — one for the office file, one for the volunteer to take with them — so both sides have a record of the commitment. At the end of every shift, make sure tallies are completed accurately, all campaign materials (scripts, phones, clipboards) are collected, and the volunteer is thanked — twice — before they leave with their next shift already on the books.

D. Canvassing

Canvassing is the most important tool in the field program's toolbox, and running a good canvass launch is one of the most consequential things an organizer does. Nothing about it is complicated, but it does require real preparation — as the saying goes, "when did Noah build the ark? Before the flood." Before your volunteers arrive, make sure you have:

1. A firm headcount of who's confirmed, so you know how many packets and how much staging space you need.
2. Canvass packets cut and ready — each with a turf map stapled to the front, driving directions on the back, the current script, talking points, a canvassing do's/don'ts sheet, and a tally/goal sheet.
3. A sign-in/sign-out sheet with everyone's cell number and which packet they've taken, so you can track down any missing lists at the end of the day.
4. Personalized tally sheets prepared in advance for each volunteer (50 knocks for a new volunteer; roughly 10 more than their last shift for a returning one).
5. Basic supplies — pens, water, and literature.

Keep the training itself tight — no more than 20 minutes — and structured: the first five minutes sell the urgency and identify who they're talking to; the next five walk through the script with an example read-through; the next five cover the coding system and stress how useless a poorly marked sheet is; the last five explain how the list is organized and send them out with a clear sense of how many hours are left and how many contacts still stand between the program and its goal.

While they're out, check in roughly once an hour (every 30 minutes for any canvasser under 18) to catch problems early and keep morale up — ask how the script is going, how they're tracking to their goal, and whether they need anything. Volunteers should never be paired up hitting the same doors together; if a nervous first-timer needs a partner, cap it at a couple of doors before splitting up. When they return, debrief the day, collect all materials, and get them re-scheduled before they leave.

E. Phone / text banking

Phonebanking reaches people canvassing can't — voters behind gates, in secure buildings, or simply not home when a canvasser knocks — and it covers more ground per hour than any other tactic, even if its contact rate runs lower than the door. A few keys to running one well:

1. Call the right list, in priority order, and know exactly who you're calling and what you're asking them for before you dial.
2. Jump straight into the script. Volunteers who ask "do you have a minute?" lose more people than those who launch directly into the ask — it should sound natural, not read verbatim.
3. ID and persuade on every call, for every candidate on the script, regardless of the first answer given.
4. Make the hard ask with strong supporters and volunteer prospects — a specific day, time, and activity, not a vague invitation.
5. Never stop at one ask. If someone says yes, ask for a second shift. If they say no, don't hang up — address the objection and ask again.
6. Dial, dial, dial. Wrong numbers and not-homes aren't wasted calls — a wrong number found and corrected makes every future call to that list better.

As with canvassing, preparation before volunteers arrive and active engagement during the shift (sitting near volunteers, listening in, correcting and encouraging in real time) separate a good phonebank from a room full of people quietly making bad calls. When they finish and turn in their data, reschedule them immediately — the same rule as canvassing.

Text banking runs on the same coding and ask discipline as phones, but at much higher volume and lower contact rate — a single volunteer can send upwards of 1,000 messages in a sitting, so tone and brevity matter more than a long script. Treat it as a lower-cost supplement to knocks and calls, not a replacement for either.

F. Relational organizing

Relational organizing flips the model: instead of a volunteer or organizer contacting strangers, you're asking supporters to reach out to the people who already trust them — friends, family, coworkers, neighbors — with a personal message rather than a campaign script. It tends to produce higher trust and higher response rates per contact than cold outreach, precisely because it isn't cold.

The tradeoff is that it's harder to manage and measure at scale than canvassing or phonebanking — you're relying on volunteers to actually follow through on their own time, using their own networks, rather than working a list you've handed them. Treat it as an additive program layered on top of your core canvass and phone universe, not a substitute for either: give relationally-inclined volunteers a clear, specific ask (e.g., "text five people this week and ask them to commit to voting"), and check back in with them the way you would on any other recruitment ask.

G. Volunteer leadership and growth

As your program's capacity grows — especially heading into GOTV — a single organizer can only personally manage so many volunteers before quality slips. That's the moment to start promoting your most dedicated volunteers into the leadership roles described in Building the Team (Staging Location Directors, Confirmation Coordinators, Canvass Captains, Phone Captains, Runners, and Comfort Volunteers).

Promote based on merit, enthusiasm, and demonstrated reliability — not tenure alone — and be deliberate about it rather than letting it happen accidentally. A volunteer leader should be someone who's already shown they'll show up, follow the data and coding standards without being reminded, and bring energy to a room. Investing in this pipeline early means that when the program truly scales up before Election Day, you already have a trained bench of people who can run a staging location or a canvass launch without an organizer standing over their shoulder.

XIV. Setting up and managing data & VAN - pulling lists, entering data, good coding

A. Types of data - MyVoters vs. MyCampaign

Every field program runs on two distinct databases, and knowing which one to use for what is the first thing anyone touching VAN needs to internalize:

MyCampaign is the organization's volunteer database — used for intern and volunteer recruitment, scheduling, searching, and management. If someone isn't a registered voter, or you simply want to track them as a volunteer prospect, you create and manage their record here.

MyVoters is the state voter file — every registered voter in your state or district. It's used for direct voter contact: creating lists, pulling universes, and entering the results of voter contact. Critically, new people can never be added to MyVoters directly; the file only updates through official voter file refreshes. Some MyVoters instances have a connected MyCampaign tab, but that tab should never be used to house actual volunteer data — keep the two strictly separate.

If you're ever unsure which database a task belongs in, don't guess — ask.

Understanding data on a profile:

The fastest way to find (or add) a person in VAN is Quick Look Up, available from the main menu. Search on a few letters of a name rather than the full name to avoid typos throwing off your results, and remember it behaves almost identically in both databases with one key difference: in MyCampaign, if there's no match you can create a new record on the spot; in MyVoters, if someone isn't already in the file, they simply can't be added by campaign staff. Enter as much information into a profile as you have — an unrecorded detail might as well not exist the next time someone needs it.

B. Lists and searches - pulling data

Unless you have explicit instruction otherwise, you should never pull your own voter contact lists — always narrow from the pre-established folders shared with you, since each folder represents a specific targeted universe that senior staff have set up intentionally.

It's worth understanding the distinction between a search and a list: a search is dynamic and re-pulls everyone matching its criteria against the most current data (so someone who moves from undecided to a strong supporter drops off an "Undecided" search the next time it's run), while a list is a fixed, unchanging set of people. When editing a loaded list or search, the tools you'll use most are Add People, Remove People, and Narrow People (the one you'll reach for constantly, since it's how you go from a shared regional folder down to your specific turf). Use the Preview My List function to check a list's size before committing to it, and

whenever you touch a list, always select Remove Suppressions — never adjust suppressions manually, just clear them.

C. Data entry

If a voter contact happened but wasn't entered correctly, it might as well not have happened — you'll end up calling or canvassing that same voter again, wasting the effort a second time. Good data discipline is not optional overhead; it's the product.

1. Voter data

When entering the results of a canvass or call, data is entered under a generic canvasser name representing the team or region (e.g., "Volunteer, Northeast" or "Intern, Northeast"), never under the individual's own name — this keeps reporting clean and aggregable at the region level. Double-check the Date Canvassed field, since it defaults to the current date and doesn't auto-correct if you're entering data after midnight — you'll need to manually roll it back to the correct day. Set Source to Canvass for door data and Phones for call data, save every page before moving on, and remember that any inactivity longer than 15 minutes will log you out and lose unsaved work.

Once data is in, it needs to be checked, not just trusted. Two built-in tools do this: Canvassing Summary lets you compare data entered by county, team, or canvasser against what your tally sheets say should be there — a mismatch (say, 800 recorded knock attempts against only 300 actual walk attempts reported by canvassers) means something was miscoded and needs correcting immediately.

2. Volunteer / event data

Every volunteer shift lives in the event calendar in MyCampaign, and getting the event type and status right is what makes every downstream report accurate.

Event types (canvass, phonebank, data entry, intern interviews, etc.) each have defined shift-time blocks, and statuses carry precise meanings that senior staff rely on to project capacity and turnout:

Scheduled (a hard verbal commitment), Confirmed (a follow-up hard confirmation, generally for next-day shifts), Tentative (a soft commit that doesn't count toward real shift projections), Completed, No Show, Declined, and Rescheduled all mean something specific, and marking someone incorrectly distorts the campaign's picture of its own strength.

If you're not sure what to schedule someone under, ask rather than guess.

D. Coding: Survey questions, activist codes, and event data

Coding is what turns a pile of individual conversations into a program that can be measured and managed. Survey question responses (like the "Vol Yes" / "Vol Maybe" responses referenced in the volunteer tiers above) are what let the campaign build and refine its recruitment universes automatically rather than by hand. Activist codes tag people so they flow into the right pre-built searches — a new applicant, for instance, gets coded so they land on the uncontacted-prospects list a coordinator is working. Event data coding (see above) is what makes every goal-vs-actual, flake-rate, and universe-penetration report trustworthy.

The underlying rule is the same one that governs everything else in this section: if it isn't coded correctly, it doesn't exist. A conversation that happened but wasn't coded is invisible to every report the campaign uses to make decisions — treat coding accuracy with the same seriousness as the conversation itself.

E. Using built in tools to access lists

1. Virtual phonebanks

A Virtual Phone Bank (VPB) lets volunteers cycle quickly through a loaded list of voter or prospect profiles without needing a physical list in hand. To set one up: narrow your list down to the correct universe and geography, select the "Calls" icon and "Create Virtual Phone Bank," title it clearly (date, area, and list description, so anyone can tell what it is at a glance), choose the correct script, and add the users who'll be calling into it. Call results in a VPB include options like Not Home, Left Message, Wrong Number, Other Language, and Hostile — and two, Disconnected and Deceased, that permanently delete the associated number, so they should only ever be used when the call itself makes that explicitly clear.

2. Turf cutting

Walk lists need one more step before they're canvass-ready: cutting them into physically walkable packets, always one precinct at a time. Load the appropriate list from your Walk folder, narrow to county and precinct, and use the turf-cutting map to draw walkable groupings by clicking to enclose an area — turf is always measured and cut by number of doors, never by number of people, with a firm minimum of 50 doors per packet so volunteers have enough to make a shift worthwhile. Keep areas non-overlapping and continue until every voter on the list is assigned to a packet. When saving, follow a standard naming convention (Date_Region_County_Precinct) so packets are easy to find later, and remember that turf cutting doesn't register as "activity" in VAN — keep another tab open and active so the 15-minute timeout doesn't wipe out your work.

3. Pushing lists via through the API

Many modern canvassing and calling tools sync directly with VAN through its API rather than requiring a manual export and print — meaning a narrowed, suppression-cleared list can be pushed straight to a volunteer's phone for a mobile canvass or dialer session instead of being printed into a paper packet. This doesn't change any of the underlying discipline described above: the list still needs to come from the correct folder, be properly narrowed, and have suppressions removed before it's pushed out — the API just changes the delivery mechanism, not the standards.

F. Accessing reports and exporting data

Once a list or search is loaded, running it through Counts and Crosstabs lets you break results down by a variable like precinct or region without leaving VAN, which is often the fastest way to sanity-check a universe's size before committing to it. Where permissions allow, exporting a list to Excel is useful for building the reference tables and formulas that feed a campaign's reporting spreadsheets (see Reporting and Monitoring below) — and it's typically these nightly exports, not manual counts, that feed the statewide reports senior staff use to track the whole program.

XV. Reporting and monitoring - tracking progress and program evaluation

A. Key metrics

A handful of core metrics recur across nearly every report a field program generates, and it's worth having them cold:

- **Contact rate** — of the attempts made (knocks, dials, or texts), what percentage resulted in an actual conversation?
- **Knocks/dials per shift (KPS)** — how much a given volunteer or intern actually produces in a shift, the core measure of individual productivity.
- **Shift-to-contact ratio** — how many recruitment dials or contacts it takes to generate one scheduled shift; a ratio that's drifting the wrong way usually flags either a pitch problem or a bad calling list.
- **Flake rate** — the share of scheduled shifts that don't actually show up and complete.
- **Decline rate** — the share of scheduled shifts that are proactively canceled before the shift ever starts.

Every report below is really just these numbers sliced a different way — by region, by staffer, by universe, or by time period.

B. Voter contact program reports

1. Goal vs actual

The single most important recurring report in a field program lays out, on a weekly or monthly basis, goal against actual for shifts, doors/dials, and contacts — broken out separately for volunteers and interns, since the two often perform very differently. Alongside the raw goal-vs-actual numbers, this report should calculate the **percentage to goal**, the **deficit**, and the underlying **rates** (contact rate, knocks/shift, contacts/shift, decline rate, flake rate) that explain *why* a region is on or off pace, not just that it is.

2. Universe penetration & performance

This tracks what share of a named universe (Persuasion, Turnout, GOTV I/II, or whatever you've defined) has actually been attempted and contacted so far. A universe that's badly under-penetrated relative to the calendar is an early warning sign — either it needs more capacity thrown at it, or its priority relative to other universes needs to be reconsidered before it's too late to catch up.

3. Daily and all time volunteer activity

Pair a daily snapshot with cumulative, all-time totals side by side. The daily number tells you about today's momentum; the all-time number tells you where the program actually stands against its full-cycle goal. Looking at either one alone gives an incomplete picture — a strong day can mask a program that's still badly behind for the month, and a strong month-to-date number can mask a program that's stalled out this week.

C. Volunteer program reports

1. Staff recruitment and contact to shift ratio

This tracks each staffer's own recruitment dials, contacts, and the shifts those calls actually produce. A staffer with strong dial numbers but a

weak shift-to-contact ratio isn't converting — that's a coaching opportunity on their pitch, not just a numbers problem to flag.

2. Active volunteer retention and growth

Think of this as a funnel: start with everyone who's ever completed a shift, subtract anyone already scheduled for a future shift, subtract anyone who's told you "Vol No," subtract anyone who said "Vol Maybe" too long ago to still be live, and what's left is your genuinely eligible, callable active volunteer base. Tracking this funnel over time — rather than just raw cumulative volunteer counts — is what catches a shrinking base before it becomes a capacity crisis you can't recruit your way out of in time.

3. Confirmation, flake chase, and rescheduling

This tracks how well the confirmation/flake-chase schedule (see Volunteer Recruitment above) is actually working in practice — confirmation rates by round, how many shifts and doors are being lost to declines each week versus regained through new recruitment, and critically, the **reschedule rate**: what percentage of volunteers who complete a shift get rebooked for another one on the spot. Of everything in this report, reschedule rate is probably the single best leading indicator of a healthy, sustainable program, since it's a direct measure of whether "they stay for you" is actually happening.

4. Tier penetration & performance

This tracks how far each region has worked through its volunteer tiers (as defined in Volunteer Recruitment above) and how each tier is converting into scheduled and completed shifts. When a tier is thoroughly worked and conversion is dropping off, that's the signal to expand into the next, broader tier rather than continuing to squeeze a tapped-out list.

D. Using data properly - adjusting goals and expectations

All of this reporting exists to help the campaign make better decisions tomorrow — not to produce an impressive-looking spreadsheet. As I said back in the targeting section, numbers and projections aren't magic; they're context. Use reports to diagnose *why* a number looks the way it does, not just to note that it does. And when a report reveals that an underlying assumption was wrong — a contact rate that's consistently running lower than planned, a completion rate that's consistently higher — go back and adjust the goal itself rather than grinding forward against a number that was never realistic to begin with. That's not lowering the bar; a goal built on a bad assumption was never actually measuring performance in the first place.