

# Your Template Campaign Plan

Make a copy of this document, then use this template to organize the key elements of your campaign's plan.

## Table of Contents

<b>Using This Template</b>	<b>3</b>
<b>District Overview</b>	<b>5</b>
<b>Field Plan</b>	<b>10</b>
<b>Fundraising Plan</b>	<b>22</b>
<b>Communications Plan</b>	<b>37</b>
<b>Digital Plan</b>	<b>42</b>
<b>Budget Summary</b>	<b>56</b>
<b>Compliance &amp; Legal</b>	<b>58</b>

## Using This Template

### What is this?

This is the [National Democratic Training Committee's](#) campaign plan template. Your campaign plan lays out how you will win. It can be a living document that you change over time, but starting with a plan is key.

This document provides a structure you can use to create your own campaign plan and instructions for drafting it -- including suggestions for NDTC's courses that can help you with each section. While you create yours, you can also reference NDTC's imaginary School Board candidate [Megan Hammond's Campaign Plan Sample](#) to see what this will look like when you're finished.

### How do I use this?

We've created this template to make your life easier as you draft your own. To make the most of this template, we suggest filling it in as you take NDTC's [online courses](#). The courses provide the formulas, skills, and context to help you build your campaign plan and fill in this template. Even if you're not taking all the courses, we provide individual course suggestions throughout this template to show you where to get help if you want help completing a section.

To use this template, we suggest you:

- [Make a copy](#) of this document.
- Pick a section to start with -- If you don't have a strong preference or workflow already, the order the sections appear in here is a good guide.
- Review the notes and guides within the section and start building your plan!
  - Section descriptions and some suggestions are in italics. Delete these when you're done with them.

- [Guides to what to include in a certain spot are provided in brackets. Replace the text in brackets with the information for your own campaign.]
- Xs indicate that you should insert your number in its place.
- We've left tables blank for you to fill in.
- When you're finished with your campaign plan, delete these two pages and the associated header on the table of contents.
- Share the plan with your team! Your core, trusted team members will be much better at their individual jobs if they have the full context that your campaign plan provides.

## Is this everything?

A campaign plan is an important foundation for a campaign, and it can be pretty hefty. In some courses, you may notice more exhaustive versions of some sections than what you see here. We've made some trims and cuts to keep things concise. If there's more that you'd like to include in your own plan, go for it -- once you make a copy, it's all yours. Write your plan so it serves your campaign and your team.

## Your Template District Overview

<b>History &amp; Industry</b>	<b>6</b>
<b>Demographics</b>	<b>6</b>
<b>Electoral Information</b>	<b>7</b>
<b>This Race</b>	<b>8</b>

A district overview provides important background on your district's residents, economy, political landscape, and voters.

[Use this space to introduce the candidate's district. Include key information about where it's situated like the county and/or towns that the district encompasses. Include the specific district or seat your candidate is running for (if applicable).

## History and Industry

*[Add some background on the district, such as the economic developments, social issues that are important to the community at the moment, and major stakeholders within the community.]*

*[Place a map of your district]*

The major businesses and employers in the district include:

- [Business 1]
- [Business 2]

[How are these issues or developments affecting the people in the community? What are they concerned about as a result of these developments?]

## Demographics

The current population of the district is [XX,XXX], of which [X,XXX] are registered voters and [XX]% of registered voters turned out to vote in the recent election of [XXXX].

Geography	
[Town/City/Neighborhood Division #1]	[XX]% of the district's voting population
[Town/City/Neighborhood Division #2]	[XX]% of the district's voting population
[Town/City/Neighborhood Division #1]	[XX]% of the district's voting population
[Town/City/Neighborhood Division #1]	[XX]% of the district's voting population

Race and Ethnicity	
African-American/Black	[XX]%
Asian-American	[XX]%
Hispanic/Latinx	[XX]%
White/Caucasian	[XX]%

*[Add any additional demographic information on eligible voters that might provide insights as you craft your plan, such as proportion of registered voters who prefer to speak a language other than English or number of unregistered but eligible voters.]*

## Electoral Information

The electorate is registered as:

Democratic	[XX]%	[X,XXX] voters
Republican	[XX]%	[X,XXX] voters
Independent	[XX]%	[X,XXX] voters

**The key office holders representing the district are:**

*[Add as many bullets to list out as many office holders as are relevant]*

<b>[1st Key Office Holder]</b>	[Their party]	[% of the vote won last election]
<b>[2nd Key Office Holder]</b>	[Their party]	[% of the vote won last election]
<b>[3rd Key Office Holder]</b>	[Their party]	[% of the vote won last election]

**This Race**

*[Describe the lay of the land in your race: Is there an incumbent? Of what party? Is the election partisan? What are their key vulnerabilities, issue positions. or openings that may be key to your success?]*

**Nomination/Primary Election**

*[Are you preparing for a primary election? Who are you expecting the challengers to be, or why do you not expect any challengers? If your candidate is running for a non-partisan office that you file for and then go straight to the general election, delete this section.]*

*[When is the filing deadline and how will that play into your preparation for the election whether you will have to compete in a primary election?]*

*[If you are expecting a primary: In a couple sentences, describe your opponent(s) at a high level. What are their credentials and vulnerabilities? What are some key assets (e.g., endorsements, fundraising or timing advantages) your campaign has to help you defeat them?]*



*[If you are NOT expecting a primary: What are you doing to prevent/avoid a nomination fight (e.g., have lined up four top Democratic officials' endorsements, raising early money)? At the 10,000-foot level, how will you pivot and change your plan if someone does crop up to challenge the campaign?]*

## **Candidate Background**

*[Basic info on the candidate: How long have they lived in the area? What is their marital status? Do they have kids? How old are the kids? Are the kids in public school? What does the candidate do for a living?]*

*[What issue or reason propelled the candidate to run? Why is the candidate running for this particular office/seat? Does the candidate have any natural constituencies or organized groups whose early support they can have confirmed and can count on to help get things going?]*

*[A few sentences about the candidate, including their current career and how much time they can dedicate to the campaign and timing restrictions (e.g., working 9-5 M-F, but start and lunch times can be flexible to accommodate campaign needs). How much of their own finances is the candidate willing to contribute to get the campaign started (e.g., buy website domains, filing fees)?]*

## Your Template Field Plan

<b>Vote Goal</b>	<b>11</b>
<b>Ballot Access Plan</b>	<b>12</b>
<b>Voter Targeting</b>	<b>14</b>
<b>Voter Contact Plan</b>	<b>16</b>
<b>Timeline</b>	<b>20</b>

Your Field Plan outlines your campaign’s strategy to contact voters individually in order to persuade them to vote for your candidate and then to actually cast their ballots. It usually includes your plans for canvassing and phone banking -- and how volunteers will support those.

## Vote Goal

For questions about this section, review the [“Calculating Your Vote Goal”](#) course.

Vote Goal		
	Reasonable Estimate	High Turnout Estimate
<b>This Year’s Projected Turnout Percentage:</b>	[% of registered voters]	[% of registered voters]
<b>Current Registered Voters in District:</b>	[Amount of registered voters]	
<b>Projected Turnout:</b>	[Amount of voters]	[Amount of voters]
<b>Vote Goal:</b>	[Amount of voters]	[Amount of voters]

*\*Note: NDTC recommends using 52-55% when determining a campaign’s Vote Goal; we used 55% for this example*

## Background

[Document the reasons you are expecting turnout to be on the higher (or lower) end and any other assumptions you made to come up with these numbers. This may include the competitiveness of up-ticket races and/or that you used past data from a neighboring district since yours hasn’t been competitive in many years.]

## Ballot Access Plan

For questions about this section, review the [“Getting Your Campaign Off the Ground”](#) course.

[What forms must be filled out to declare their candidacy and/or file to get on the ballot? By what date and time are each form or other filing documents/fees required to be submitted, and to what office? Include and double check the address of the office or other method of transmission.]

- [Form 1 Name & Link]
- [Add bullets to list out all the necessary forms and requirements]

### Petition Signatures (if applicable)

#### Petition Signatures Required:

#### [XXX] of signatures

[If this figure wasn't provided by the election official and you calculated it yourself based on population or past voting figures, what is the formula you used?]

#### Goal for Petition Signatures:

#### [XXX] of signatures

[What formula did you use to calculate this figure? How much greater than the minimum requirement are you aiming for?]

**Proposed Schedule of Signature Collection Events (if applicable)**

	Venue	Signature Goal
[Date]		
[Date]		
[Date]		
[Date]		

## Voter Targeting

For questions about this section, review the ["Targeting Voters"](#) or ["VoteBuilder 101"](#) course.

### Vote Goal

#### Your Base Voters

[What criteria did you use to calculate this figure?] Note that you may have 0 Base Voters in many non-partisan and primary elections.]

#### Vote Deficit

[Vote Goal - Base Voters]

#### Persuasion Universe Size

[Vote Deficit x 3]

## Persuasion Universe

*[Each row in this grid is a category of voters that comprise your persuasion universe. The left-hand column total should be greater than the Persuasion Universe Size calculated above. Don't forget to deduplicate your data -- you don't want to count the same individual in multiple categories or rows. You can add or delete rows from this grid, depending on how many categories of voters you're targeting in the Persuasion phase of the campaign.]*

	Total Number of Voters	Conversion Goal	Target Vote Number
<b>Category 1</b> [Document what criteria you used to calculate this figure.]			
<b>Category 2</b> [Document what criteria you used to calculate this figure.]			
<b>Total</b>			

**Persuasion Universe Background**

**[Category 1]**

[Describe any assumptions or estimates that went into defining this category and the proportion of the people within it that you expect to convert to your supporters/voters. How easy will it be for you to convince these types of voters? Why? Estimate what percentage of these voters do you think you can persuade.]

**[Category 2]**

[Describe any assumptions or estimates that went into defining this category and the proportion of the people within it that you expect to convert to your supporters/voters. How easy will it be for you to convince these types of voters? Why? Estimate what percentage of these voters do you think you can persuade.]

Add as many categories and descriptions as you did rows to the Persuasion Universe grid.

## Voter Contact Plan

For questions about this section, review the [“Field Tactics”](#) and [“Campaign Events”](#) courses.

### Current Schedule of Campaign Outreach Events

Add as many rows to the table below as you need to include key outreach events (e.g., meet and greets or volunteer recruitment events) that are already on the books.

[Date]	
[Date]	
[Date]	
[Date]	

[Add any outreach event goals or additional information that will support your planning here. Who are your targets for these events -- what campaign goals will these events support? For example, you may aim for two meet-and-greets per month, with the goal of recruiting at least 2 new volunteers and meeting 2 new potential \$50+ donors at each.]



## Targeted Voter Contact

Supporter ID Goals & Estimated Volunteer Needs for Persuasion Phase				
Pass	No. of Attempts	Target No. of Supporter IDs	Canvassing Volunteer Hours*	Phone Banking Volunteer Hours*
1				
2				
3				
<b>Total</b>				

\*As calculated in the [weekly volunteer goals worksheet](#)

Add additional rows to this table if you will be aiming to attempt to contact your persuasion list more than 3 times (i.e., making more than 3 passes).

[Are different categories of voters or precincts/geographies getting canvassed in some passes and phone banked in others? How did you determine these priorities?]

Precinct Priorities for Persuasion Phase				
Precinct	# in Persuasion Universe	Pass #1	Pass #2	Pass #3

*Add additional rows to this table if you have voters in your persuasion universe from more than 5 precincts (as is common).*

*Add additional columns if you will make more than 3 passes at your persuasion list.*

**GOTV**

**Targeting:** [Which categories of voters will you contact during GOTV?]

**Deadline:** [When should lists and priorities be determined by?]

**Projected GOTV Universe:** [What number of voters are you going to plan to have in your GOTV universe when budgeting and estimating volunteer needs? Double check: This should be larger than your vote goal.]

### Tentative GOTV Voter Contact Sequence

<b>Contact Attempt 1</b>	[Contact Method]
<b>Contact Attempt 2</b>	[Contact Method]
<b>Contact Attempt 3</b>	[Contact Method]
<b>Election Day Attempt</b>	[Contact Method]

*Add additional rows or columns to this table if you will attempt to contact the individuals in your GOTV universe more than 4 times during GOTV.*

## Timeline

For questions about this section, review the [“Field Tactics”](#) course and either [“Targeting Voters”](#) or [“VoteBuilder 101”](#).

Change the months and month segments to reflect meaningful timeframes for your campaign. Insert major deadlines (paperwork deadlines, election date, etc.) and note what phase of outreach/voter contact your campaign will be in during each month. Then add the corresponding volunteer recruitment and supporter identification goals you have for each month that will support your campaign’s plans and hitting your final vote goal.

	Voter Contact Activities	End of Month Voter ID Goal	Volunteer Recruitment Goal*	Major Deadlines
January				
February				
March				
April				
May				
June				
July				
August				

September				
October 1-15				
October 15-29				
Oct. 30-Nov. 3				

*\*This is a running/cumulative tally*

## Your Template Fundraising Plan

<b>Fundraising Goals Overview</b>	<b>23</b>
<b>Quarterly Fundraising Goals</b>	<b>25</b>
<b>SMART Goals</b>	<b>26</b>
<b>Quarter 1: Goals &amp; Tactics</b>	<b>27</b>
<b>Quarter 1: Tactics by Revenue Stream</b>	<b>28</b>

Make a copy of this document, then use this template to organize the key elements of your campaign's fundraising plan.

Pro-tip: To add additional quarters to your plan, copy pages 5-12, paste them at the very end of the document, and then update the quarter numbers as necessary. This way, you'll preserve the document's formatting and be able to refresh and automatically update the table of contents.

## Fundraising Goals Overview

A Fundraising Plan is a detailed listing of the revenue sources you will rely on to hit your fundraising (and therefore budget) goals. Developing these goals is a balance of art and science. To get the science part as close as possible, the [Setting Your Fundraising Goal Research Worksheet](#) will help you ask the most important questions.

### Overall Fundraising Goals

*[Use this space to document your campaign's overall campaign fundraising goals. If you used our Fundraising Goals Worksheet, stick with your Realistic Budget and Fundraising Goal for now (though you should create separate versions of this Finance Plan for both your Ideal and Uh-Oh Fundraising Goals as well.) Divide your Realistic Goal into top-level estimates of how much you'll raise through each revenue stream over the course of the campaign. As you execute your fundraising plan, you should be adjusting your budget and goals accordingly.]*

Overall Fundraising Goal & Budget		
Overall Fundraising Goal	Campaign Budget	Already in Bank ([Date])
\$[XXX]	\$[XXX]	\$[XXX]

### Fundraising Goal by Revenue Streams

Call Time	\$[XXX]
Events	\$[XXX]
Direct Mail	\$[XXX]
Digital	\$[XXX]
PACs	\$[XXX]
Finance Committee	\$[XXX]



## Quarterly Fundraising Goals

*[Use this space to document your primary and general elections' reporting periods (if your state has more frequent deadlines, you can continue to add rows to the table). Divide your overall fundraising goal into those periods, setting the amounts that you hope to raise during each. Make sure you know your state's contribution limits for both your primary and general races.]*

### Reporting Deadlines

Election Reporting Deadlines			
	Deadline	Reporting Period	Fundraising Goal
P1			
P2			
P3			
P4			

Contribution Limits				
	Primary		General	
<b>Individual:</b>	\$[X,XXX] per election		<b>Individual:</b>	\$[X,XXX] per election
<b>PAC:</b>	\$[X,XXX] per election		<b>PAC:</b>	\$[X,XXX] per election

## SMART Goals

[Use this space to translate your goals into big picture SMART goals for your campaign. Read page one of this [SMART Goals Worksheet](#) for a review of the SMART model for effective goal-setting. Feel free to copy and paste in additional rows as you may need.]

1	<p><b>SMART Goal:</b> <i>E.x. We are not starting off with a lot of money in the bank and call time is the most cost-effective way to raise money. We will need to raise \$xx,xxx through call time by the end of the first quarter, [date], in order to have enough money for direct mailers during the second quarter. Based on the strength of our candidate's network, this means they and the relevant staffers will need to spend xx hours in call time during the first quarter.</i></p>
2	<p><b>SMART Goal:</b></p>
3	<p><b>SMART Goal:</b></p>

## Quarter 1: Goals & Tactics

Quarter 1 Fundraising Goal \$[XX,XXX]		
Period: [Date]—[Date]		
	Goal (\$)	% of Total
Call Time	e.g. \$100,00	e.g. 45%
Events		
Direct Mail		
Digital		
PACs		
Finance Committee		

## Quarter 1: Tactics by Revenue Stream

### Call Time

For questions about this section, review the [“Call Time”](#) lesson of our “Writing Your Fundraising Plan” course.

[Use this space to indicate the target dates by which you intend to hit the phone-based fundraising goals you’ve set for the quarter. You can add additional rows as you need.]

Quarter 1 Goal - \$[X,XXX] Call Time Hours Goal: XXX Hours	
[Date]	<ul style="list-style-type: none"> <li>• Raise \$[XXX] in the door</li> <li>• \$[XXX] in new pledges</li> <li>• XX hours of call time needed</li> </ul>
[Date]	<ul style="list-style-type: none"> <li>• Raise \$[XXX] more by this date (for a total of \$[XXX])</li> <li>• New pledges totaling</li> <li>• XX hours of call time needed</li> </ul>
[Date]	<ul style="list-style-type: none"> <li>• Raise \$[XXX] more by this date to meet the quarter goal of \$[X,XXX]...</li> <li>• New pledges totaling</li> <li>• XX hours of call time needed</li> </ul>
Q1 Money Raised - \$[X,XXX]	

## Events

For questions about this section, review the [“Events”](#) lesson of our “Writing Your Fundraising Plan” course.

[Use this space to briefly describe your organization’s strategic approach to calendaring out, holding, and debriefing fundraising events. Copy and paste the blank event table below for as many events as you’ve planned for the quarter. Indicate who owns which parts of the work using the [MOCHA model](#).]

Quarter 1 Goal - \$[X,XXX] (Budget: \$XXX)				
Event: [Event description]				
Date	Fundraising Goal	Budget	Targets	MOCHA
[Date]	\$(XXX)	\$(XXX)	[Is this a hosted or campaign-driven event? Who is your audience?]	M: O: C: H: A:
Event: [Event description]				
Date	Fundraising Goal	Budget	Targets	MOCHA
[Date]	\$(XXX)	\$(XXX)	[Is this a hosted or campaign-driven event? Who is your audience?]	M: O: C: H: A:
Q1 Budget Spent - \$[XXX]			Q1 Money Raised - \$[X,XXX]	

## Digital

For questions about this section, review the [“Digital”](#) lesson of our “Writing Your Fundraising Plan” course.

*[The campaign will send more than one fundraising email and post more than one fundraising ask on social media per quarter. You don’t need to plan them all out here — that’s what your media calendar is for. However, this section of the fundraising plan is helpful to call out the themes or pieces/email campaigns that are most essential for you to hit your fundraising goals. What key issues and calls to action will your emails and social posts be structured around? What key metrics (e.g., open, read through, and conversion rates) will be reported?]*

**Quarter 1 Goal - \$[X,XXX]**  
(Budget: \$XXX)

**Piece/Campaign:**

Audience	Date/Range	Fundraising Goal	MOCHA
			M: O: C: H: A:

**Piece/Campaign:**

Audience	Date/Range	Fundraising Goal	MOCHA
			M: O: C: H: A:

Q1 Budget Spent - \$[XXX]

Q1 Money Raised - \$[X,XXX]

## Unions & PACs

For questions about this section, review the [“PACs”](#) lesson of our *“Writing Your Fundraising Plan”* course.

**Quarter 1 Goal - \$[X,XXX]**

### Labor Unions: \$[X,XXX] Goal

[Which unions have a lot of members in or near your district? Are any unions working to organize in or near your district? Are there any broader political factors (e.g., flipping a state legislative chamber) that your campaign’s success would contribute to? If so, which unions are prioritizing that goal?]

Union	Goal	Deadline	Contact	Phone Number
[1]	\$(XXX)	[Date]	[Person]	(000) 000-0000
[2]	\$(XXX)	[Date]	[Person]	(000) 000-0000

### Other PACs: \$[X,XXX] Goal

[Are there any corporate, nonconnected, or leadership PACs that your candidate should be pursuing an endorsement from? You can start with our list of [Supporting PACs and Organizations](#). Be sure to vet each organization for alignment with your campaign’s message.]

Union	Goal	Deadline	Contact	Phone Number
[PAC 1]	\$(XXX)	[Date]	[Person]	(000) 000-0000

## Finance Committee\*

For questions about this section, review the [“Finance Committee”](#) lesson of our “Writing Your Fundraising Plan” course.

**Quarter 1 Goal - \$[X,XXX]**

What are the expectations of a finance committee member? What is the minimum amount you’re telling them they have to raise or donate directly? Are there interim deadlines for this?

What is the goal for the number of finance committee members you want to recruit? Who are you targeting to join your finance committee?

\*This is an optional revenue stream. Depending on the size and scope of your campaign, you may choose to forego a Finance Committee.

### Committee Targets

Person	Contacted	Confirmed	Not Confirmed	Declined
[1]				
[2]				

### Fundraising Goals

[Use this space to track the progress of your Finance Committee members in meeting their interim fundraising goals.]

[Date]	Raise \$[XXX] by this date
[Date]	Raise \$[XXX] by this date
[Date]	Raise \$[XXX] by this date

**Q1 Money Raised - \$[X,XXX]**



## Notes

*[Use this space to note any important dates or meetings you want to schedule with the club/committee, as well as how you plan to show gratitude for your recurring donors' engagement.]*

- 
- 
-

## Direct Mail\*

For questions about this section, review the [“Direct Mail”](#) lesson of our “Writing Your Fundraising Plan” course.

*[Use this space to briefly describe your campaign’s strategic approach to mail-based fundraising initiatives. Who are the primary audiences for your direct mail campaigns and why? How effective have past campaigns been, in terms of cost per dollar raised? Copy and paste the blank table below for as many mail campaigns as you’ve planned for the quarter.]*

*\*This is an optional revenue stream. Depending on the size and scope of your campaign, you may decide that it is not worth it to spend money on direct mail campaigns.*

**Quarter 1 Goal - \$[X,XXX]**  
(Budget: \$XXX)

Piece/Campaign:			
Audience	Date/Range	Fundraising Goal	MOCHA
			M: O: C: H: A:

Piece/Campaign:			
Audience	Date/Range	Fundraising Goal	MOCHA
			M: O: C: H: A:

Q1 Budget Spent - \$[XXX]

Q1 Money Raised - \$[X,XXX]

Paid for by the [National Democratic Training Committee](#) PAC.  
Not authorized by any candidate or candidate's committee. Printed in house.

## Your Template Communications Plan

<b>Communications Team MOCHA</b>	<b>37</b>
<b>Rapid Response Plan</b>	<b>37</b>
<b>Candidate Boilerplate &amp; Bio</b>	<b>38</b>
<b>Campaign Message Guide</b>	<b>38</b>
<b>Storybank</b>	<b>38</b>
<b>Campaign Communications Calendar</b>	<b>38</b>
<b>Media List</b>	<b>39</b>
<b>Style Guide &amp; Press Kit</b>	<b>40</b>

## Communications Team MOCHA

Assign responsibilities to your communications team here.

M – [Manager]	
O – [Owner]	
C – [Consultant]	
H – [Helper]	
A – [Approver]	

## Rapid Response Plan

### On-Call Schedule

Date	Owner
[Date]	
[Date]	
[Date]	
[Date]	

## Approval Protocol

## Candidate Boilerplate & Bio

Candidate Boilerplate

Candidate Full Bio

## Campaign Message Guide

## Storybank

## Campaign Communications Calendar

	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Message of the Week							
Message of the Day							
Holidays							
Events							
Press Releases/Advisories							
Interviews							
Earned Media							
Email							

Social							
Digital Ads							
Paid Comms							

For an example of a more detailed calendar see [Aisha's Communications Calendar](#).

## Media List

<b>Outlet:</b> e.g. ABC 27			
<b>Media Market</b>		<b>Type</b>	<b>Beat</b>
<b>Reporter</b>	<b>Twitter</b>	<b>Telephone</b>	<b>Email</b>
<b>Editor</b>	<b>Last Contacted</b>	<b>Tags (If Applicable)</b>	
<b>Notes</b>			

<b>Outlet:</b> e.g. ABC 27		
<b>Media Market</b>	<b>Type</b>	<b>Beat</b>

Reporter	Twitter	Telephone	Email
Editor	Last Contacted	Tags (If Applicable)	
Notes			

## Style Guide & Press Kit

Style Guide

Press Kit



## Your Template Digital Plan

<b>Overall Digital Goals</b>	<b>42</b>
<b>Email Program</b>	<b>42</b>
<b>Social Media</b>	<b>44</b>
<b>Texting Program</b>	<b>46</b>
<b>Digital Ads</b>	<b>49</b>
<b>Target Audiences</b>	<b>51</b>
<b>Reporting</b>	<b>53</b>
<b>Approval Processes</b>	<b>54</b>

This digital plan template is designed to be adapted for your campaign. Not every piece of this worksheet will be relevant to your campaign, and you may want to add or remove sections as you go.

## Overall Digital Goals: [Time Span, e.g. Jan 1–Election Day, etc.]

<b>1</b>	[Big picture goal]
<b>2</b>	[Big picture goal]
<b>3</b>	[Big picture goal]

## Email Program

*What do you need to achieve with your email program? Write the goals for your email program below.*

### Email Goals

<b>1</b>	[A specific goal for your email program to support your big picture goals]
<b>2</b>	[A specific goal for your email program to support your big picture goals]

**3**

[A specific goal for your email program to support your big picture goals]

Status as of [Current Month]

Statistic	Performance
Email Subscribers	[Information pulled from email platform]
Active Subscribers (have opened 1+ email in that last 6 months)	[Information pulled from email platform]
List Growth Rate (Oct–Jan)	[Information pulled from email platform]
Average Open Rate	[Information pulled from email platform]
Average Click-Through Rate (CTR)	[Information pulled from email platform]
Average Conversion Rate	[Information pulled from email platform]
Fundraising Emails Sent	[Information pulled from email platform]
Total Contributions	[Information pulled from email platform]
Total # of Contributions	[Information pulled from email platform]
Average Contribution	[Information pulled from email platform]

<b>What's Working?</b> [List the email strategies that your campaign has found works for your target audience and subscribers]	<b>What Isn't Working?</b> [List the email strategies that your campaign has found hasn't worked for your target audience and subscribers]
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>

### Email Goal Tactics

<b>1</b>	[A tactic you will use to achieve your email goals]
<b>2</b>	[A tactic you will use to achieve your email goals]
<b>3</b>	[A tactic you will use to achieve your email goals]

### Social Media

*What do you need to achieve with social media? What platform(s) will you use? If you are using multiple platforms, copy and paste the goals, status, what's working, and tactics templates below and update them for each social media platform you are using.*

## Social Media Goals

1	[A specific goal for your social media program to support your big picture goals]
2	[A specific goal for your social media program to support your big picture goals]
3	[A specific goal for your social media program to support your big picture goals]

## Status as of [Current Month]

Statistic	Performance
Page Likes	[Information pulled from social media platform]
Average Page Likes Per Day	[Information pulled from social media platform]
Page Follows	[Information pulled from social media platform]
Average Page Follows Per Day	[Information pulled from social media platform]
Average Engagement Rate	[Information pulled from social media platform]
Average People Reached Per Month Organic	[Information pulled from social media platform]
Average People Reached Per Month Paid	[Information pulled from social media platform]

<b>What's Working?</b> [List the social media strategies that your campaign has found works for your target audience and subscribers]	<b>What Isn't Working?</b> [List of social media strategies that your campaign has found hasn't worked for your target audience and subscribers]
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>

**Social Media Goal Tactics**

- 1
[A tactic you will use to achieve your social media goals]
- 2
[A tactic you will use to achieve your social media goals]
- 3
[A tactic you will use to achieve your social media goals]

**Texting Program**

*What do you need to achieve with texting? What types of texting will you use in your campaign?*

## Texting Goals

1	[A specific goal for your texting program to support your big picture goals]
2	[A specific goal for your texting program to support your big picture goals]
3	[A specific goal for your texting program to support your big picture goals]

## Status as of [Current Month]

Statistic	Performance
Average Contact Response Rate (replies)	[Information pulled from social media platform]
Average Broadcast List Monthly Growth	[Information pulled from social media platform]
Average Click-Through Rate	[Information pulled from social media platform]
P2P List Size as of [month]	[Information pulled from social media platform]

<b>What's Working?</b> [List the texting strategies that your campaign has found works for your target audience and subscribers]	<b>What Isn't Working?</b> [List the texting strategies that your campaign has found hasn't worked for your target audience and subscribers]
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>
<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>	<ul style="list-style-type: none"> <li>• [Strategy]</li> </ul>

### Texting Goal Tactics

<b>1</b>	[A tactic you will use to achieve your texting goals]
<b>2</b>	[A tactic you will use to achieve your texting goals]
<b>3</b>	[A tactic you will use to achieve your texting goals]



## Digital Ads

*What types of ads will you use to support your overall goals? Include each platform in your Placement Ad Spending breakdown below.*

### Introductory Ads

The goal of these ads is to prime our potential supporter universes and voter universes for the persuasion and acquisition part of the conversation, as well as start increasing follower counts and acquisitions for supporters.

Overall Budget: \$[XXX]		Placement Ad Spend:	
<b>Placement:</b>	\$[XXX]	<b>Social Media:</b>	\$[XXX]
<b>Production:</b>	\$[XXX]	<b>Banner:</b>	\$[XXX]
		<b>Pre-Roll:</b>	\$[XXX]
		<b>Search:</b>	\$[XXX]
		<b>Audio:</b>	\$[XXX]

### List Acquisition Ads

Paid content with a call to action that acquires email addresses.

Overall Budget: \$[XXX]		Placement Ad Spend:	
<b>Placement:</b>	\$[XXX]	<b>Social Media:</b>	\$[XXX]
<b>Production:</b>	\$[XXX]	<b>Banner:</b>	\$[XXX]

	<b>Pre-Roll:</b>	\$[XXX]
	<b>Search:</b>	\$[XXX]
	<b>Audio:</b>	\$[XXX]

### Fundraising Ads

Ads that specifically ask the viewer to give money to the campaign.

Overall Budget: \$[XXX]		Placement Ad Spend:	
<b>Placement:</b>	\$[XXX]	<b>Social Media:</b>	\$[XXX]
<b>Production:</b>	\$[XXX]	<b>Banner:</b>	\$[XXX]
		<b>Pre-Roll:</b>	\$[XXX]
		<b>Search:</b>	\$[XXX]
		<b>Audio:</b>	\$[XXX]

### Persuasion Ads

These ads have the goal of persuading your audience to vote for a candidate - or vote against another candidate.

Overall Budget: \$[XXX]		Placement Ad Spend:	
<b>Placement:</b>	\$[XXX]	<b>Social Media:</b>	\$[XXX]
<b>Production:</b>	\$[XXX]	<b>Banner:</b>	\$[XXX]

	<b>Pre-Roll:</b>	\$[XXX]
	<b>Search:</b>	\$[XXX]
	<b>Audio:</b>	\$[XXX]

### GOTV Ads

The goal of Get Out The Vote (GOTV) ads are to convince people who your campaign has identified as supporters to cast their vote in the election.

Overall Budget: \$[XXX]		Placement Ad Spend:	
<b>Placement:</b>	\$[XXX]	<b>Social Media:</b>	\$[XXX]
<b>Production:</b>	\$[XXX]	<b>Banner:</b>	\$[XXX]
		<b>Pre-Roll:</b>	\$[XXX]
		<b>Search:</b>	\$[XXX]
		<b>Audio:</b>	\$[XXX]

### Target Audiences

#### Data Sources

What Data Will We Use and Where Will We Get It?

[Fill in the sources you will use to collect your data]

## **Audience Targeting**

### **Introductory**

[Who and how will we target during the introductory phase?]

### **List Acquisition**

[Who and how will we target to populate our email list?]

### **Fundraising**

[Who and how will we target to raise money for our campaign?]

### **Persuasion**

[Who do we need to target to persuade to vote for our candidate?]

### **GOTV**

[Who will we target to get out and vote?]

## Reporting

*How will you communicate your progress to the rest of the campaign? What analytics will you monitor? How often will you report them?*

<b>1</b>	[High-level reporting schedule & information]
<b>2</b>	[High-level reporting schedule & information]
<b>3</b>	[High-level reporting schedule & information]

## Reporting Data

Statistic	Performance
<b>Email Performance</b>	[Specific metrics to monitor and report performance]
<b>Digital Fundraising Performance</b>	[Specific metrics to monitor and report performance]
<b>Social Media Analytics</b>	[Specific metrics to monitor and report performance]
<b>Texting Performance</b>	[Specific metrics to monitor and report performance]
<b>Ad Performance</b>	[Specific metrics to monitor and report performance]

## Approval Processes

*Who will create content for each digital program? Who is needed to approve that content? What are your contingency plans if the approver is unavailable?*

Approval Processes by Program	
Program	Process
Email	[Who is responsible for drafting, reviewing, and approving this content?]
Social Media	[Who is responsible for drafting, reviewing, and approving this content?]
Texting	[Who is responsible for drafting, reviewing, and approving this content?]
Rapid Response	[Who is responsible for drafting, reviewing, and approving this content?]

## Your Template Budget Summary

### Realistic Budget

56

A campaign budget is necessary in order to project just how limited your money will be during the campaign. There will be three different versions of a winning budget: a realistic budget which is what you will most likely raise, an uh-oh budget which tells you what you have to cut first if your fundraising is struggling, and your ideal version which will have details about where extra cash will be spent during a windfall.

## Realistic Budget

For questions about this section, review the [“Budgeting & Financial Compliance”](#) course.

	Q1	Q2	Q3	Q4	Total
<b>Finance</b>	\${XXX}	\${XXX}	\${XXX}	\${XXX}	<b>\${XXX}</b>
<b>Field</b>	\${XXX}	\${XXX}	\${XXX}	\${XXX}	<b>\${XXX}</b>
<b>Media/Comms</b>	\${XXX}	\${XXX}	\${XXX}	\${XXX}	<b>\${XXX}</b>
<b>Paid Media</b>	\${XXX}	\${XXX}	\${XXX}	\${XXX}	<b>\${XXX}</b>
<b>Staff &amp; Admin</b>	\${XXX}	\${XXX}	\${XXX}	\${XXX}	<b>\${XXX}</b>
<b>Total</b>	<b>\${XXX}</b>	<b>\${XXX}</b>	<b>\${XXX}</b>	<b>\${XXX}</b>	<b>\${XXX}</b>

*Add your topline numbers from your realistic version of your budget here to serve as a guidepost and double check with the budgets described in each of the other sections. You can also link out to your budget spreadsheet that contains all three versions in more detail.*



## Your Template Compliance & Legal

<a href="#">Contributions</a>	58
<a href="#">Expenditures</a>	58
<a href="#">Reporting Deadlines</a>	59
<a href="#">Advertising Disclaimer</a>	59
<a href="#">Further Legal Questions</a>	60

Your Compliance Plan should outline how the campaign will track contributions and expenses. Tracking should be done regularly so you always know how much cash you have on hand and don't overspend. You will also use a lot of this information when it comes time to submit campaign finance reports.

## Contributions

For questions about this section, review the [“Budgeting & Financial Compliance”](#) course.

### Contribution Limits

**Individual**    \$[X,XXX] per election  
**PAC**            \$[X,XXX] per election

#### Mail Schedule

[Who will check the mail each day and collect contributions?]

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
\$(XXX)	\$(XXX)	\$(XXX)	\$(XXX)	\$(XXX)	\$(XXX)

### Process

1. [List the process of how and when contributions will be collected from the mail and deposited; and how online and check contributions will be entered into the campaign’s tracking system and incomplete donor information followed up on.]
2. [Use as many bullets/steps as you need.]

## Expenditures

For questions about this section, review the [“Budgeting & Financial Compliance”](#) course.

1. [Delineate the rules about who can authorize campaign expenses over a certain amount, what documentation is required for the campaign to issue a

reimbursement or pay a bill, and any other rules the campaign has about expenses.]

- [Use as many bullets as you need.]

## Reporting Deadlines [Your State's]

Primary Reporting Deadline			Gen. Election Reporting Deadlines		
	Deadline	Reporting Period		Deadline	Reporting Period
P1			G1		
P2			G2		
P3			G3		
P4			G4		

[Who is responsible for submitting finance reports and to where?]

[Who will review and audit the books and how often?]

## Advertising Disclaimer

This disclaimer must appear on **[what types of documents or media]**. **[Note any exceptions that the relevant law makes.]**

[Insert disclaimer language here]

## Further Legal Questions

- [Who will team members contact to address any legal questions that you may have throughout the campaign? How can they reach the person?]
- [Add any further information you want your team to have about compliance.]
-