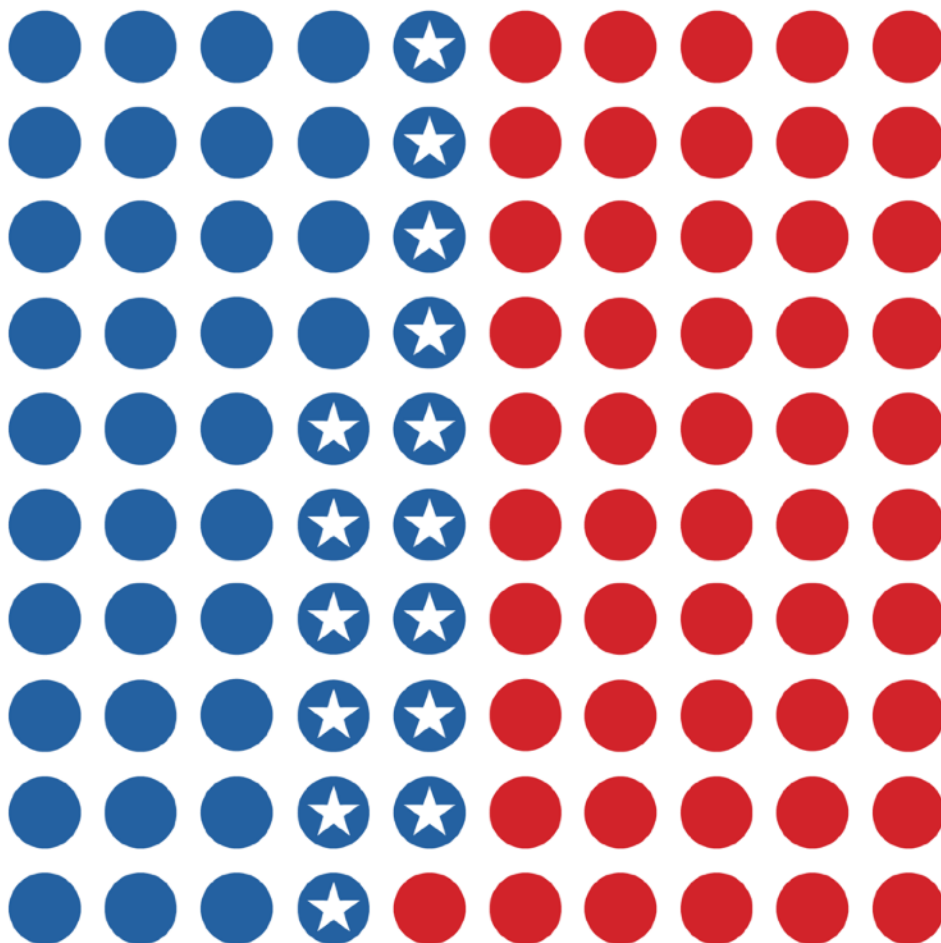


# Lessons Learned from the 2017 Virginia Elections 2.0

## How the Grassroots Helped Flip VA Blue



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“Create a ‘you’re part of our team’  
environment for volunteers.”

- Candidate



## Executive Summary

A coalition of 40 grassroots organizations in Northern Virginia and Washington D.C. began meeting regularly in early 2017 to share ideas and coordinate their activities for the 2017 Virginia House of Delegate races. Members of this coalition now share our “lessons learned” about how grassroots organizations can best support progressive Democratic candidates in Virginia House of Delegate and Senate races. We believe these lessons apply to races in other states and in Congressional races as well. Below is a summary of our findings.

- **Understand campaign realities and constraints.** Campaigns must raise money early and are run on a shoestring budget.
- **Take Advantage of a Blue Wave to Support Candidates Beyond Those Most Likely to Win.** Support candidates getting less attention from large donors or party organizations in purple districts taking into account recent election results, candidate quality, retiring incumbents, and proximity of strong grassroots groups. Even in red districts, a strong Democratic candidate can move the needle by shifting the debate on issues, increasing support for Democrats running state-wide, and enhancing the chances for future success.
- **Listen to what the campaign needs and where its needs match your organization’s capabilities, fill the void.** Be a reliable, dependable campaign partner and your organization will gain credibility with the campaign and earn its trust.
- **Canvassing and fundraising are the two most impactful ways the grassroots can assist campaigns.** Grassroots organizations can also undertake research (donor, opposition, legislative), postcard writing, text, and phone banking efforts. They can write letters to the editor, offer housing to staff and out of town canvassers, and work the polls on Election Day. Grassroots organizations can offer expertise in areas such as social media, graphic design, Facebook or web page design, and videography. Let the campaign know what your organization can offer and follow through.
- **Remember, campaign managers and staff are BUSY.** Be organized and respectful of their time. Consider a single point of contact between your organization and the campaign.
- **Develop coalitions among grassroots organizations.** Use the power of coalitions to determine where to allocate support across multiple campaigns. Create an environment where organizations can learn and strategize together.
- **Volunteer engagement is critical.** Design events and campaign support activities to generate enthusiasm and maintain engagement. Make events fun; personally contact new members and encourage them to attend; offer a range of activities that permits volunteers to choose based on how much involvement they want and that reflect their comfort levels. Be creative!



**Wendy Gooditis and Canvassing  
Packets**

**“Running a campaign is like running a small business; establishing priorities and managing limited resources, including time, is critical.”**

*- Candidate*

## Introduction

The 2017 House of Delegates (HoD) elections brought remarkable change. The Democrats won 15 seats that were formerly held by Republicans, coming within one seat of tying the long held Republican majority. These campaigns were assisted by the energy, enthusiasm and persistence of newly formed grassroots organizations that “popped up” in response to the 2016 presidential election. These organizations were driven by a commitment to better governance and progressive causes, and strove to support candidates committed to those ideals. Their volunteers were intent on making a difference and needed assurance that their efforts were focused and effective.

In April 2017, a coalition of approximately 40 grassroots organizations in Northern Virginia and Washington D.C. began meeting monthly to share ideas and coordinate their activities in the 2017 HoD campaigns. After the 2017 election, the coalition decided to distill the lessons we learned to: (1) empower grassroots organizations to provide earlier and more focused support to future Virginia HoD and state Senate campaigns, and (2) provide the benefit of our experience to grassroots organizations beyond Virginia as they mobilize to support progressive candidates in their states. We also hope that our experiences will be useful to grassroots organizations working on congressional races.

Our lessons were derived from 16 interviews with HoD campaign managers and candidates — some who won and some who lost. We interviewed candidates and campaign managers from suburban and rural districts, as well as from blue, purple and red districts. We also surveyed over two dozen grassroots organizations to learn about their experiences supporting the HoD campaigns.

What we learned was quite remarkable. By harnessing the energy of committed volunteers, the grassroots organizations were pivotal in shifting elections in favor of progressive candidates whose campaigns were considered “long shots” by the Democratic Party of Virginia. By listening to the needs of the campaigns and filling some of their resource voids, we gained credibility with candidates and staff and earned their gratitude and trust. We also gained credibility with local Democratic Committees and elected representatives at the state and congressional levels.

While our successes felt triumphant to us and caught many by surprise, we cannot rest on our laurels. Grassroots organizations must keep their volunteers energized and committed. The opposition will be ready for the next election.

This document is intended to be “living,” and will be updated as we continue to reflect and undertake research. Throughout the document, links can be found for additional resources, guides and tools. These links will continue to be updated as new resources become available.

## Campaign Realities

The newly formed grassroots organizations were comprised of many volunteers who had never worked on campaigns. The grassroots organizations and their volunteers were exposed to a crash course in political activism, including the hard realities underlying most state HoD and senate seat campaigns. So we start our lessons learned with a summary of overarching realities that should inform an organization about how to best use the time and talent of its volunteers. These realities, like all of the lessons learned, are based on Virginia's HoD races; however, we believe that many will be true for candidates running for other offices.

### Reality 1

Like yeast, early money rises. Campaigns for state HoD and senate seats must *immediately* raise money to hire staff, cover filing fees, and attract money from the Democratic party and from donors. They must raise money early.

### Reality 2

Campaigns are run on a shoestring budget. Even if the campaign is successful in raising early money, it inevitably faces critical decisions about how to allocate limited resources and set priorities. How much should be spent on flyers versus social media? When should money be expended to hire additional campaign staff such as field organizers? Campaigns are perennially short-staffed.

### Reality 3

Gold Standard—Canvassing and Fundraising. While the grassroots can play multiple roles, bear in mind that knocking on doors and raising money are the most critical services volunteers can provide to a campaign.

### Reality 4

The primary objective is to get the candidate elected. Make sure the expectations of your organization are in line with the needs of the campaign.

### Reality 5

Be reliable. Campaigns need reliable, dependable partners. Identify the capabilities your organization can bring to the campaign. Once your organization makes a commitment, follow through. Organizations that fail to follow through drain the time and energy of campaign staff.

The Virginia 2017 races were unique. More progressive candidates ran for the House of Delegates than ever before. The Democratic Party of Virginia lacked the fiscal resources and infrastructure to support so many new candidates. Grassroots organizations stepped in to fill the gaps wherever they could.

## BRING POSITIVE ATTITUDE AND ENERGY

“What’s all the excitement about?” Campaigns rely on the energy and optimism of grassroots volunteers to generate interest in the candidate and attract new volunteers, donors, endorsements, and media opportunities.

The grassroots organizations brought the greatest contributions to candidates that were not actively supported by the Democratic Party of Virginia. The Democratic Party channeled most of its money and support into the top 4-5 races that it considered “winnable.” Grassroots groups, however, focused on the next tier races in districts that Hillary Clinton carried but had Republican incumbent delegates. Grassroots organizations deemed these 17 districts as “flippable” and brought energy, a positive attitude, and much needed funds to these races. They helped transform what seemed impossible into a reality.

### THE MID-TIER STRATEGY

Reaching beyond the most electable candidates to support candidates in promising “Mid-Tier” districts proved to be a winning strategy. Aware of the Blue Wave, a number of the grassroots organizations focused on the other 12 or so “Mid-Tier” districts, which had more modest Hillary Clinton margins, but very strong Democratic challengers. It was clear that, given the huge Republican majority in the HoD (66 versus 34), picking up only a handful of Democratic seats would do little to change policies in the Virginia General Assembly.

## LISTEN TO THE CAMPAIGN

The most critical question a grassroots organization can ask is “What does the campaign need?” Repeatedly, the Campaign Managers (CMs) emphasized the importance of asking this question. Campaigns generally know what they need. Like a CEO, the CM continually reassesses the campaign’s highest needs and priorities as they change over time. An organization that adopts the campaign’s priorities is poised to become an invaluable asset to the campaign.

Occasionally campaigns noted that certain organizations had an agenda at odds with that of the campaign. This occurred when organizations, for example, sought to promote issues that were out of sync with the district. Remember, if your organization has chosen to support a candidate, your primary mission is to get the candidate elected. So when your members interact with a campaign, remind them to stay focused on the priorities established by the candidate and campaign staff.

## UNDERSTAND YOUR GROUPS’ SKILLS AND TALENTS

Well organized volunteers serve as surrogate campaign staff. They free up the candidate and paid staff to focus on priorities such as interacting with voters, spreading the message, and raising money.

Grassroots organizations should survey their volunteers to inventory the skills and services their volunteers can and, *are willing to*, contribute to the campaign. A survey questionnaire should include a list of potential services and skills including: canvassing, turn-key fundraising events, donor research, opposition research, legislative research, technology support, social media expertise, personalized postcard writing, texting, phone banking, letters to the editor, providing housing for out of town canvassers, and election day poll work. After reviewing the survey results, determine what your organization can reliably offer.

Remember — be pragmatic and realistic — you can always scale up.

## **UNDERSTANDING CAMPAIGNS**

*“Running a campaign is like running a small business; establishing priorities and managing limited resources, including time, is critical. We have small staffs drowning in paperwork and inundated with endless critical tasks.” —Candidate.*

Campaign managers are busy. Campaign Managers (CM) are constantly juggling their time between (1) interacting with community leaders, local businesses, party officials, donors, voters, and volunteers, (2) determining how many mailers to produce, (3) designing mailers, (4) developing a social media strategy, (5) working with pollsters, (6) conducting opposition research and (7) an array of other campaign-critical tasks and “fire drills.” Time management is the most common challenge faced by CMs.

### **BE ORGANIZED. BE RELIABLE.**

**Be Organized - Internally.** Given the competing demands for the CM’s time, a grassroots organization should designate a single point of contact (POC), whenever possible, between itself and the CM. The POC will introduce the campaign to the grassroots organization — who it is, where it is located geographically, what types of support it can offer, and how much it can offer. To help the campaign remember specific organizations, POCs should re-introduce themselves each time they contact the campaign. Prior to meeting with the CM, POCs should prepare questions in advance and ask follow-ups at that time. By being organized, POCs respect the CM’s limited time.

By far, the most important job of a POC is to coordinate the organization’s volunteer activities with the campaign. But a POC should also be responsible for communicating the campaign’s needs and constraints to its organization. This ensures that volunteers stay informed of campaign activities and events and feel “part of the team.”

For larger groups offering diverse activities or services, consider designating a volunteer to coordinate each separate activity, whether canvassing, social media, or fundraising. Under these circumstances, it may be appropriate to have more than one POC between the campaign and the organization. This topic should be discussed with the CM.

**Be Organized – Coordinate with Other Grassroots Groups.** In the spring of 2017, one of the leaders of a large grassroots organization reached out to leadership in approximately 40 other groups in Northern Virginia and D.C. and instituted monthly coordination meetings. Leaders used these meetings to get to know each other, share ideas, enhance coordination and collaboration. The monthly organizer meetings had a clear and focused agenda, were tightly run, and lasted no longer than two hours. These meetings are particularly beneficial in regions with large numbers of grassroots groups.

## PERCEIVING THE BLUE WAVE—STRATEGY TO WIN

By the summer of 2017, activists observed signs of a wave of voter sentiment moving in the blue direction in Virginia. These included: a hefty 58% larger turnout in the Democratic primary for Governor than in the Republican primary, a strong preference for a Democratic legislature in statewide polls, sizable Democratic wins in special elections, and palpable enthusiasm encountered during canvassing among Dem-leaning voters, including previously low-frequency voters, to turn out for the upcoming election. By tracking and analyzing this data, grassroots organizations felt confident focusing their energy on the Mid-Tier districts, which in some instances, were distant from their geographic base. Of the 15 seats that flipped from red to blue, 9 were Mid-Tier. These mid-tiers were **pivotal in shifting the balance of power** in the legislature. Four additional mid-tier candidates lost by less than 200 votes and are poised to run again in 2019, potentially to win a clear majority.

Grassroots organizations can allocate their time and resources *across* various campaigns by evaluating data on metrics, established by the Democratic Party, such as number of doors knocked per week. This data is available from Mobilize America, local Democratic Committees, and the campaigns. After evaluating the data, coalitions can determine how best to deploy canvassers to help campaigns meet their targets. Similarly, coalitions can ask campaigns for weekly fundraising metrics to determine what assistance they can provide to meet a campaign's fiscal requirements. They can also review data on donations from the Virginia Public Access Project which is updated monthly.

The benefits of a coalition also include:

- Creating a forum to broadcast a campaign's requests and recruit additional volunteers, including those with skills in web design, social media or graphics;
- Allowing grassroots organizations to share best practices and lessons learned with other volunteers; and,
- Improving the delivery of services, minimizing duplication of effort, and ensuring better volunteer resource allocation.

## CO-SPONSORED FUNDRAISER

In Northern Virginia, activists from multiple organizations sponsored a community fundraiser for 25 Virginia HoD candidates. The activists pooled resources, expanded outreach, and created a publicity buzz, which attracted Tom Perriello (Democratic Gubernatorial primary candidate) as a keynote speaker. Together, the activists raised over \$30,000.





**Organize Early and Be Reliable.** Because campaign momentum increases over time, establish working relationships with campaigns early-on. Also, once an organization makes a commitment, it should follow through. Remember — the campaign is now counting on, and planning for, this support. Organizations that drop the ball force the CM to devote time and energy to locate other volunteers to fill the gap.

**Prior to the Primaries.** Before the primaries, grassroots organizations can:

- Canvass to collect missing information on voters/households to improve voter rolls;
- Host Meet and Greet events where voters get to know the candidates;
- Survey candidates or their CMs to learn about their platforms;
- Host voter registration drives, especially on university campuses, in minority communities, at festivals or other public events; and
- Help voters obtain valid voter IDs.

## CHOOSE YOUR APPROACH

In Northern Virginia we found two approaches particularly successful in supporting campaigns: Adopt-a-Candidate and Specialized Support.

### ADOPT-A-CANDIDATE

Organizations that adopted a candidate selected a race to support and stuck with it throughout the campaign. Adopt-a-Candidate volunteers became experts in the campaign and provided an array of support. They were the “go to” organizations when the campaign needed donor or opposition research or canvassing. As volunteers from organizations demonstrated a willingness to roll up their sleeves and take on multiple tasks, their value to the campaign increased.

Keys to a successful Adopt-a-Candidate approach include:

- Selecting a district race to support and sticking with it;
- Meeting with the campaign as early as possible;
- Understanding the campaign’s needs;
- Offering a menu of services that your organization can provide (see more details in Menu of Services section);
- Establishing a POC with clear communication channels between the campaign and the group; and,
- Developing partnerships with grassroots organizations within the district.

### SPECIALIZED SUPPORT

The organizations that developed specialized support became experts in providing a technical skill or other service to multiple campaigns. For example, volunteers with some of the grassroots organizations developed fundraising skills and raised money on behalf of several campaigns. Others focused solely on writing personalized postcards to campaigns throughout the state. In some instances, large groups with a nimble force of canvassers used them to

surge across several campaigns at critical junctures. Organizations that provide specialized support should determine with the campaign whether their specific skills meet the campaign's needs.

### SHOWING UP WHEN MOST NEEDED

The race for Virginia HoD District 21 exemplifies how these two approaches work. Early in the race, candidate Kelly Fowler almost quit because she could not afford to pay her campaign manager. Grassroots organizations spread the word that her campaign needed additional support. In response, volunteers that specialized in fundraising raised enough money to hire a CM. Other activists adopted her district and hosted a turn-key fundraising event, helped draft policy positions, provided donor research and canvassers. While Kelly won, without the support of the grassroots organizations, Democrats might have lost this opportunity to win District 21.



Canvassing	Texting	Work the Polls
Fundraising	Postcard Writing	Technology Support
Research	Letters to the Editor	
Phone Banking	Offer Housing	

The following are key services offered by grassroots organizations in the 2017 HoD races.

### CANVASS, CANVASS, CANVASS

*“Canvassing is everything. It’s so important that in addition to volunteer canvassers, I hired four part-time canvassers. Together, we knocked on 40,000 doors in 2 months.”*  
—Campaign Manager

All campaigns need access to an adequate supply of *trained* canvassers — a perennial top campaign priority. See, [Ground Game Matters](#)

Canvassing serves several strategic goals. Early in the campaign, canvassing:

- Introduces voters to the candidate;
- Helps identify issues important to voters which helps the campaign shape its message;
- Provides opportunities to persuade voters; and
- Determines a voter’s party preference.

Later in the campaign, the goal of canvassing is to get voters to the polls. This is especially critical during the last several weeks of an election, and is aptly known as “Get Out the Vote” (GOTV).

Although campaigns find canvassing one of the most impactful activities offered by volunteers, it is often volunteers’ least favorite task. Many simply dread knocking on the doors of strangers. But once volunteers understand the purpose and importance of canvassing, many are willing to give it a try. After canvassing, many previously skeptical volunteers express tremendous satisfaction with their canvassing experience. They enjoy sharing with voters their enthusiasm for a candidate and why.

### CANVASSING SATISFACTION

A first time volunteer was unsure about canvassing because she felt nervous talking to strangers. Then she knocked on the door of a young mother who opened the door flanked by her two young daughters. The young mother was a first generation American who had recently become a US citizen. She proudly stated to her children that she was excited to vote for first time in her life in 2017. This meeting and others like it motivated the volunteer to continue to canvass nearly every weekend.

**Training.** The importance of canvassing training cannot be overestimated. It builds volunteer confidence, capabilities and positive energy. Campaigns generally provide basic training that introduces the volunteer to the candidate and the issues important in the district. Some campaigns provide training on the unique demographics within their districts — particularly important in rural areas.

A number of grassroots organizations believed additional training would help their volunteers feel competent, improve effectiveness, and instill a sense of team mission. They created their own [training materials or used videos they found online](#) to teach volunteers how to greet a voter, test what issues resonate, gently persuade, and explain why *every person's vote matters*.

Grassroots organizations can enhance canvassing skills in the following ways:

- Cultivate veteran canvassers within an organization to provide periodic training sessions for other volunteers interested in canvassing. Bear in mind, that refresher training for veterans may be helpful.
- Pair new canvassers with experienced canvassers in order to build confidence and competence.
- Encourage repeat canvassers. With experience, canvassers' skills improve and their effectiveness increases.
- Ensure that canvassers understand the key issues in the district.

**Build Capacity.** Grassroots organizations can build capacity by encouraging their canvassers to:

- Recruit volunteers within the community;
- Challenge five friends to commit to canvass throughout the campaign;
- Provide testimonials to encourage other volunteers;
- Sponsor a competition — prizes for most doors knocked or the most number of voters spoken to on a given day; and
- Recruit a coordinator responsible for reaching out to volunteers and confirming volunteer canvass sign-ups.

Encourage the campaign to tap college students to canvass and get out the vote. [NextGen America](#) has college student mobilization programs in a number of states. NextGen mobilized students from American University, George Washington University, and George Mason University in several of the Northern Virginia HoD campaigns. If NextGen or a similar group is not in a district, reach out to college Democrat clubs.

## UNIFIED CANVASSING DAY

*“Create a ‘you’re part of our team’ environment for volunteers.” —Candidate*

Virginia grassroots organizations held a unified canvassing day and deployed more than 100 volunteers across the state to canvass on behalf of Democratic candidates for the House of Delegates. Because over 30% of our volunteers were first time canvassers, we paired them with experienced canvassers. We found that pairing not only increased their comfort but also reduced the “flake” rate — volunteers knew others were counting on them to attend. The event enjoyed such success that we held additional unified canvassing days.

## FUNDRAISING

*“Raising money is a constant struggle; it’s a never ending competition for time and attention of donors.” — Campaign Manager*

Candidates expressed frustration with the realities of fundraising. They had to raise money out of the starting gate in order to get the attention of the Democratic Party of Virginia. Without early fundraising success, the Party was unlikely to offer financial support to the campaign, which, in turn, hampered the ability of the campaign to hire critical staff. Without critical staff, the candidate had to do more, which reduced the time devoted to raising money.

*“It was a vicious cycle.” — Candidate*

Volunteers improved the financial viability of several of the Virginia delegate races. Volunteers pumped significant infusions of cash into several races which were struggling to cover basic campaign costs like staff salaries. Throughout the campaign, volunteers raised funds to cover campaign operations and specific costs such as social media ads and mailers. The more reliable the cash flow, the easier it was for the campaign to make strategic spending decisions. Volunteers raised money through three general approaches: holding events, crowdfunding, and personal asks. All three methods can generate significant funding.

**Events.** Event fundraisers run the gamut, but irrespective of the type of fundraiser, campaigns prefer turn-key events — events that involve no candidate or staff time. An example of a turn-key event is a house party where volunteers invite neighbors, friends and community activists and provide the location and refreshments. All the candidate has to do is show up or “Skype in.” Event ideas include:

- Invite a respected citizen to introduce the candidate — one who knows the candidate well. A local police chief, business leader, or medical professional can be more persuasive than a politician.
- Enhance a fundraising event by soliciting a nonprofit, such as Emily’s List, to provide a matching grant for a limited period of time.
- Have fun [Food Fundraisers](#) including [homemade soup sales](#), “dress your potato” bars, chili cook offs, wine tasting, or cooking classes.
- Harness the power of volunteers from multiple organizations by hosting a unified fundraiser. Consider inviting candidates to attend so potential volunteers can develop a personal connection with the candidates. A summary of the Virginia unified fundraiser is available [here on our google drive](#).

### DINING FOR DEMOCRACY

Dining for Democracy is an example of a fun, turn-key fundraiser. Host a festive dinner party. Invite guests who “Donate to Dine.” The candidate can join the meal in person or by Skype. To keep it simple, consider making it pot luck.

**Fundraising Beyond Events.** Expand your repertoire of fundraising tools to include crowdfunding platforms, email, meetings, and canvassing. One of our groups, for example, created a “Dollar a Door” canvas challenge. Members asked friends and family to donate a set dollar amount per door for each door a member knocked during a canvassing weekend. Irrespective of the tool used, set a funding goal, find ways to keep members accountable, report progress toward the goal, and encourage members to tap friends and family to further the momentum. These efforts not only energize members but also generate a competitive synergy amongst members to seek more and larger donations.

**Crowdfunding.** Crowdfunding entails raising money from a large number of small donations. Set up an online fundraiser using a platform such as Crowdpac, CauseVox, or ActBlue. These platforms have different features, but generally allow an organization to fundraise without directly handling the money. Once the organization chooses a platform, volunteers can solicit donations from friends and family using email and social media with a dedicated link to the online fundraising platform.

**Direct Personal Asks.** Encourage members to build on relationships and connections by making “asks” for donations personal. Use “personal asks” as an opportunity to tell the candidate’s story and generate urgency to donate. When groups combined innovative fundraising tools with personal asks, they were surprised by the level of money raised and subsequently increased their fundraising goals. Two groups within the Virginia Grassroots Coalition raised well over \$200,000. When direct personal asks are paired with a fundraising event, they significantly increase the number of donors and the amount of individual donations. In one instance, volunteers used Evite to invite friends and colleagues to a fundraising event and followed up with personal phone calls and meetings with invitees. Personal contact with invitees yielded a contribution rate of 85% while emails alone yielded only 25%!

Consider the following when planning your “personal ask:”

- Ask your members to make a specific funding commitment at an organization meeting.
- Create a strong “case statement” for making the donation commitment and use it as a basis for “personal asks.”
- Ask potential donors for a specific large one-time donation or multiple smaller contributions.
- Arrange a skype meet and greet with a candidate (when feasible) as another form of “personal-ask” and/or include a candidate video link.

Many volunteers were initially hesitant to ask for donations, but, as with canvassing, they found the experience gratifying and felt a palpable connection to the campaign.

Organizations and their volunteers should be aware of, and comply with, state laws governing fundraising for political campaigns. This includes collection of donor information required by your state at any fundraising event.

For additional information and guidance:

- [Sample Crowdfunding emails](#)
- [Giving Circles](#)
- [Personal Asks Fundraising – High level Perspective](#)

## RESEARCH

Volunteers can provide research on critical issues.

**Donor Research.** Identifying potential donors is a time consuming task. Because of the importance of early money, donor research is most useful at the beginning of a campaign when a candidate may have few, if any, staff members. Volunteers can help a campaign by assisting in this task.

## DONOR RESEARCH DATA

In Virginia, the Virginia Public Access Project ([VPAP](#)) is a great resource for locating potential donors. Databases, such as VPAP, report the names of donors, the amounts contributed, the names of in-kind donors, the value of the in-kind donations, and the type of in-kind donations, i.e. purchase digital ad. From VPAP, volunteers can identify donors who contributed to the last Democrat running in a given district and start a donor list for the existing campaign. Through additional research, volunteers can locate donor contact information.

**Affinity Group Research.** An affinity group is a group formed around a shared interest or common goal, to which individuals formally or informally belong. Examples of affinity groups include education professionals, healthcare professionals, scientists, and environmentalists. Grassroots volunteers can help a candidate identify or develop affinity groups. Individuals who comprise affinity groups can be added to donor lists and included in funding solicitations focused on the common interest.

**Organization Research.** Grassroots volunteers can identify organizations and groups that might provide endorsements, funding, or in-kind support. Examples of organizations that provided support to the Virginia HoD races include:

- [Emily's List](#) (donations, training, endorsements)
- [Sister District](#) (canvassing, fundraising, postcard writing)
- [Planned Parenthood](#) (canvassing, endorsements)
- [Mobilize America](#) (canvassing, phone banking)
- [Flippable](#) (canvassing, donations/fundraising)
- [Forward Majority](#) (donations/fundraising)
- [NY4VA](#) (fundraising for several women candidates)
- [WinVA](#) (campaign training and support, experimental use of technology)
- [Tech for Campaigns](#) (website development and management, Facebook page development)
- [Open Progress](#) (social media campaigns, human to human texting)
- [Arena Digital Strategies](#) (high quality candidate videography)
- [Red to Blue](#) (texting)
- [Emerge America](#) (training women candidates)

**Opposition Research.** Voting records of incumbents can be a powerful tool for candidates. Candidates can use these records to distinguish themselves from their opponents on critical issues such as health care coverage, gun safety, or even positions on local toll roads. Donor research of corporate contributions when viewed in conjunction with an incumbent's voting record can raise questions as to whether the contributions influenced a legislator's vote. A campaign can use this information to its advantage.

## PHONE BANKING

Phone banking involves volunteers calling through lists of voters and talking to them about the campaign. It can corroborate voter information, recruit volunteers, and help get out the vote.

In the past, volunteers “hand dialed” calls. Modern phone-banking has expedited this process considerably through use of software that enables automatic dialing.

Phone banking can be particularly important with older populations and in rural communities where voters are more likely to answer their phones. It can increase recognition of the candidate’s name and boost donations. In one rural race, a local volunteer group made 2,000 calls. For more on phone banking, see [Call Hub](#)

## TEXTING

Like phone banking, texting can be used to increase candidate name recognition and boost funding. It is a more recent tool with new apps having been developed and released during the 2017 HoD races. Some campaigns decided to use these apps. Others declined largely because they were introduced mid-campaign, leaving insufficient time for campaign staff to test the new technology and train volunteers.

Texting has the advantage of engaging younger populations in their medium of choice. Adults under the age of 45 send an average of 85 texts today. Peer-to-peer texting allows for volunteers to have “real conversations” with the voters they text. This medium is perceived as more personal and also appears to have greater success in engaging these voters than email. See, for example the [Hustle app](#). Although the efficacy of texting in the 2017 HoD races has not been systematically analyzed, data from one race demonstrated a 20% response rate from text recipients.

Most campaigns believe that texting will be the wave of the future. See, [Texting Comes of Age](#). However, to be effective, campaigns need access to these apps early to allow time to test and modify them, as well as to train staff and volunteers.

Grassroots volunteers can offer to participate in texting campaigns. Tech-savvy volunteers can assist campaigns who need help to:

- Research and screen texting tools;
- Analyze and test the effectiveness of the tools;
- Provide guidance to the campaigns in selecting the most suitable tools.

## POSTCARD WRITING

Postcard writing campaigns can be helpful although campaigns had differing assessments on their degree of utility. Candidates in rural areas felt postcards conveyed a personal touch and were particularly effective with older populations. Other candidates noted that writing postcards activated and engaged volunteers during the period before canvassing operations revved up. Postcards written early in the campaign can be saved and mailed closer to the election. Learn more about the [impact of postcard writing on volunteers’ civic engagement](#).

All agreed that the messages on the postcards must be consistent with those of the campaign. For examples, messages in rural areas should not be too progressive or otherwise out of sync with voters. Some campaigns carefully targeted their message to different demographics within the district or by specific zip codes.



Grassroots organizations can get voter names and addresses directly from the campaign or through organizations such as [Postcards4VA](#), [Thunderdome Plus 3](#), and [Postcards for Voters](#) (Tony the Democrat). Make sure to coordinate any effort of this sort with the campaign to ensure messaging is consistent and to avoid duplicating other efforts.

Finally, know the campaign finance restrictions in your state. In Virginia, for example, postcard writers for state races must write a disclaimer stating that the postcard was paid for by the sender. Ask the campaign for specific instructions. You can find more information in Postcards4VA's [Guide to Setting Up and Facilitating a Statewide Postcard Writing Program](#).

## LETTERS TO THE EDITOR

Well-crafted letters to the editor supporting a candidate can bring welcome publicity. However, volunteers interested in drafting letters to the editor should coordinate and clear the language with the campaign.

## OFFER HOUSING

Candidates are desperate for volunteers to provide housing for out-of-town campaign staff. Campaign managers are paid a pittance and field operation managers are paid even less. Housing makes these hires affordable. Staff members typically need housing for 8-16 week periods, but due to grueling work schedules, they often spend little time in the homes of volunteers.

Volunteers can also provide housing for canvassers. This is particularly critical in rural areas. Commitments by local volunteers to provide housing permits the campaign the latitude to invite out-of-town grassroots organizations to support canvassing efforts.

## WORK THE POLLS

Volunteers can do a great service to the campaign by staffing shifts at polling locations in precincts on election day. Candidates and CMs agreed that greeting voters *cheerfully*, handing out sample ballots, and thanking folks for voting (irrespective of how they voted) made a difference. Most voters appreciated having a Democratic sample ballot available and responded positively to polite, helpful volunteers. In some counties, this effort is coordinated by the local Democratic committee, so be sure to coordinate with them before organizing an effort.

## TECHNOLOGY SUPPORT

*“Video used in social media was so effective that some voters remembered Facebook ads as TV ads” —Candidate.*

The campaigns recognized the importance of well-designed websites and Facebook pages as well as sharp, effective digital advertising campaigns. They viewed these mediums as

instrumental in professionalizing the candidate and the campaign, disseminating a candidate's view on specific issues, and supporting GOTV.

In 2017, some grassroots organizations provided technical support directly to campaigns. This support included videography, campaign website design, development of Facebook pages, and creation of digital media ads. In other instances, grassroots volunteers served as brokers between skilled experts and companies, contractors, or nonprofits offering technical services either in-kind or at reduced rates. Volunteer brokers introduced candidates to these companies and served as scheduling and communication intermediaries between the campaigns and companies. While none could act as outside, unbiased technical consultants, grassroots volunteers performed the role of “chop shop” — parceling out discrete projects to companies providing services needed by the campaigns. We learned that the chop-shop role did not end after the initial introduction. It required continued engagement by volunteers to facilitate coordination and troubleshoot issues throughout the life of the project.

### **SOCIAL MEDIA ADS — CHOP SHOP**

The process of creating and executing social media ads provides an example of this “chop shop” approach. Volunteers connected many of the HoD candidates to media organizations that created professional videography of the candidates. They also linked candidates with several other companies, nonprofits and volunteers with expertise in designing digital ad campaigns. Using the videography, experts with digital ad capabilities worked closely with the campaigns to create targeted, issue oriented ads for Facebook or other forms of social media. Volunteers also connected the candidates to experts who knew how to target audiences on social media and execute the candidate's ad buying campaign. In some instances, volunteers raised money specifically to pay for digital advertising.

Check out Open Progress's guide to [Getting Your Leader on Video](#).

**Types of Technology Support.** Campaigns found the following types of assistance particularly useful:

- Designing, developing, and maintaining websites and Facebook pages;
- Taking high quality video footage of the candidate to introduce the candidate to the voter and spotlight issues specific to the candidate's district;
- Raising money to purchase ads on Facebook;
- Helping determine key messages, message timing, and target audiences;
- Analyzing the effectiveness of ads through the use of metrics (including Facebook likes) and ad feedback;
- Providing technical coaching, including training on how to produce footage for virtual town halls and high quality images and video using a smart phone;
- Developing apps;
- Testing apps and other tools;
- Connecting campaigns with companies, nonprofits, or contractors who can provide high quality technical services needed by the campaign.

## GRASSROOTS LEVERAGES TECH VOLUNTEERS

Grassroots organizations may not have technical and digital skills in-house and need help building their websites or creating Facebook pages. Volunteer graphic designers in Virginia created digital flyers for fundraisers hosted by other grassroots organizations. In addition, technical volunteers created Facebook pages, tested canvassing apps, and designed websites for different groups. If your organization has technical expertise, consider offering this support to fellow grassroots groups.

**Identifying Campaign Needs.** Campaigns will adopt technology strategies depending on circumstances unique to their districts. For example, in districts that do not have local technology professionals, campaigns must locate this expertise from donor grassroots organizations or companies outside the district. Campaigns in rural districts may opt out of video ads because broadband access is limited. Districts with a large a millennial population may adopt more texting applications than other districts. Similarly, districts with older populations may find that texting apps are not worth the time and effort. Grassroots organizations should support the technology approaches best suited to a given district.

**New Technology Challenges.** New technology, such as recently developed apps for Get Out the Vote, can pose challenges. Campaigns in Virginia were inundated with offers to try this tool or that service. It was tough for their limited staff to track which developers were offering what technology, and whether the technology was effective. Campaigns do not have the time or expertise to sort through the array of new technologies offered. Those grassroots organizations with expertise to review and assess different technologies, such as mobile apps, and determine whether the technology is reliable and effective were a boon to campaigns.

Campaigns wanted answers to two questions - Is this new technology reliable? Is it effective? As one CM put it,

*“It was not clear where and how [the technology] had been successfully used. I wanted to see proof of success.”—Campaign Manager*

Introducing technology early in the cycle gives campaigns time to train users, troubleshoot glitches and incorporate the technology into their planning strategies. Unfortunately, because some of the technology tools were still being developed and were not released until late in the 2017 campaign cycle, the campaigns did not have enough time to master their applications and use them effectively, and in some cases use them at all.

One campaign was shocked by the amount of upfront work needed to launch a digital campaign. It recommended that staff and volunteers stockpile video footage and still photography, early in the campaign for later use. A campaign can then pull the videography or photos off the shelf at a moment's notice to create digital ads and campaign literature.

Remember, if you have a technical skill, make sure it can be applied or adapted for political campaigns. A volunteer with business website design experience offered to create a candidate's website. The final result did not capture the energy the campaign wished to convey. As the CM explained, “The website must be built with guidance from someone who knows how to maximize the benefits of campaign websites.”

**Remember Campaign Finance Laws.** Providing digital or technical support may be considered an in-kind campaign contribution. Discuss this with each campaign to ensure compliance with relevant law.



*Postcard Party*



*Dining For Democracy*



*Community Parade*



*Canvassing*

## Red and Rural Districts

### Additional Resources

*“Red voters in my District agreed with me on most of the issues, but political tribalism prevented them from voting for me.”—Candidate*

Our interviews with candidates and CMs in red or rural, often highly gerrymandered, districts revealed that these areas pose unique, seemingly insurmountable, challenges. On the surface, the cards are stacked against Democratic candidates. We asked them why they ran. The answers, like the two below, are inspirational.

*“Always challenge an incumbent. Otherwise, he is never confronted with why he (1) voted the way he did and (2) supported his position based on ‘facts’ that weren’t true. Voters deserve to have the issues and the lies uncovered. This won’t happen unless a Democrat runs.”—Candidate*

*“Democrats should run in every race so voters get to know what Democrats stand for and to force Republicans to explain their positions.”—Candidate*

We encourage grassroots organizations to support Democrats in red and rural districts, provided they recognize that some districts, or portions of districts, have these challenges:

- **Democratic Party Fiscal Constraints.** Because the Democratic Party of Virginia had limited resources, it could not invest in campaigns in rural or red districts. Funding from local Democratic committees was also limited.
- **Distrust in Government.** Many voters in rural districts do not trust “people in power” yet they re-elect Republican incumbents over and over again. Many believe that Democrats are responsible for “big money distorting and corrupting politics.”—*Candidate*
- **Fundraising.** National organizations such as the NRA, Americans for Prosperity, and the Family Foundation donated to rural Republican incumbents. Dominion Energy donated to candidates who were in favor of the Atlantic Coast and Mountain Valley Pipelines. Rural Democratic candidates had a hard time finding willing donor organizations. In addition, these candidates lacked the support and money generated by the Northern Virginia grassroots organizations. Lack of assets made it hard for some campaigns to hire and maintain even a single staff member.
- **Dispersed Populations, Geographic Distances, and Gerrymandering.** These factors had a crushing effect on rural races. It takes four hours to drive from one end of District 7, which includes Floyd and Pulaski Counties, to the other. Sparsely populated areas and long distances compound challenges associated with canvassing.

## CONSIDERATIONS FOR RED AND RURAL CAMPAIGNS

Grassroots organizations can offer the same previously-discussed menu of services to campaigns in red or rural districts that they provide for other campaigns. However, in light of the unique obstacles in these communities, the following additional considerations should be taken into account by grassroots organizations.

**Name Recognition.** Name recognition is one of the biggest challenges facing Democratic candidates in red and rural districts. Early canvassing is one way to help. We recommend that grassroots organizations work closely with the campaign to determine how best to raise the candidate’s visibility with the voters.

**Canvassing.** Canvassing is every bit as important in red and rural districts as in those that are blue or purple. According to several candidates from rural districts, out-of-district volunteers caught the attention of voters and caused them to look at these candidates more closely.

*“Voters became excited about my candidacy and shared that with their family and friends. They came to believe, I wasn’t just another politician.”—Candidate*

Canvassing in rural districts poses unique challenges. For starters, volunteers who do not live in the district require additional training on canvassing techniques such as how to begin a conversation, how to develop rapport, how to segue into an issue, how to discuss an issue, identification of local hot button topics and phrases that have loaded meaning. Out-of-town canvassers must be mindful of issues that resonate with local voters and avoid those which are out of sync.

Canvassing in a rural district takes time. Because the population is spread out and the distances within a district can be great, it is tough for a campaign to knock on every door once, let alone multiple times. This problem is exacerbated by the disproportionately small number of local volunteers in rural districts. Thus, candidates welcome infusions of outside canvassers to supplement the locals. Given these factors, grassroots organizations from outside the district must coordinate very closely with the campaign to sort out logistics, especially housing.

**Votebuilder Data.** Votebuilder is an online database used by Democratic campaigns to contact voters in individual districts. It is based on the state’s registered voter list and contains voting history as well as commercial data. Based on this data, it predicts whether a particular voter is likely a Democrat, Republican or Independent.

## **VOTEBuilder IN VIRGINIA**

In Virginia, Votebuilder is updated at least quarterly with the most up-to-date voter registration information. Candidates pay the Democratic Party a fee to access Votebuilder. Candidates generally agreed that Votebuilder is a powerful tool used to coordinate canvassing and get out the vote. However, in rural districts it is often incomplete, outdated, and inaccurate. Grassroots organizations should consult with campaigns in rural districts about how they can support efforts, such as canvassing or phone banking, to update Votebuilder data.

**Postcards.** Candidates in rural districts found postcards effective. Voters expressed to the candidates how much the postcards meant to them and put the cards on refrigerators. Given that rural populations may not have the same access to the internet as suburban populations, postcards and other personal means of communication seem to have high impact with voters. Postcard messaging, in rural communities, must be carefully coordinated with the campaign to make sure views expressed are in accord with the candidate’s.

In Virginia, grassroots organizations vary significantly in scope and size, with some having as few as 15 members, and others having upwards of 5,000 members. We polled dozens of grassroots organizations to find out how they recruited, maintained, and engaged volunteers. We found that there is no one-size-fits-all approach. If one method does not work for an organization, try different engagement methods to see what works best. Also, see [slides on volunteer engagement](#).

## ORGANIZATION AND INTERNAL STRUCTURE

Grassroots groups must be well organized to keep their volunteers engaged. Group leaders identified membership engagement as one of the most important, but challenging aspects, of grassroots activism — a high priority for 2018.

Most Virginia grassroots organizations established a leadership team that set goals and priorities. Larger organizations created sub-groups or committees, one of which was dedicated solely to directing the organization's election related activities. Smaller organizations had only one or two leaders who coordinated activities and provided discrete doable tasks to members. Whether the organization was large or small, successful leadership teams were *open* to suggestions and ideas from its members.

## COMMUNICATIONS

Effective communication is essential to effective activism. Grassroots organizations had to assess how to best keep members informed and engaged. Striking a balance is key.

- **Facebook.** Most large grassroots organizations have a private Facebook page which allows members to communicate amongst themselves and leadership to share information about actions and events. Leaders joined multiple Facebook groups to coordinate with each other and to keep tabs on other grassroots activities. Most groups set guidelines for posting - i.e. posts must (1) be action oriented, or (2) refrain from rehashing past political debates to avoid alienating members. To keep divisive issues off its main Facebook page, one grassroots organization established a separate private Facebook page for debate on the 2017 Gubernatorial Democratic primary. Some organizations required all posts to be approved by an administrator prior to posting.
- **Newsletters.** Many organizations published a regular newsletter using a free platform such MailChimp or Action Network. A regularly scheduled newsletter kept busy members informed of all activities on a single email. Newsletters are great for members not on social media.
- **Listservs.** A number of organizations used listservs, such as Google Groups, to email their subscriber members. A listserv maintains the emails of member subscribers anonymously and can also be configured to prevent subscribers from “reply all.” Organizations can create separate listservs for each of its committees or subgroups which permits easy communication among those working on specific projects without

clogging up the organization's main listserv. While most organizations found listservs helpful, they warned against sending too many listserv emails which overwhelm members and can lead them to stop reading emails or unsubscribe.

- **Membership Meetings.** Organizations found that hosting a regular (often monthly) membership meeting was a useful forum to convey information and get feedback from members on projects. Regular meetings help members get to know each other — so consider having a social event at the beginning or end of the meeting.
- **Slack.** Slack is a powerful messaging app that permits members to “chat” group wide, in sub-groups, and one-on-one. Some organizations use [Slack](#) for work on specific projects; others use it as the primary method of communication.

## EVENTS

To avoid membership burnout before Get Out the Vote and Election Day, organizations spaced out events. Organizations also had different event models.

- **Large multi-group events** such as joint canvassing days and unified fundraisers allowed members from different grassroots organizations to meet each other and create partnerships for future events. Large events also generated a “buzz” around the campaign.
- **Regularly-scheduled events** such as weekly canvassing or postcard parties encouraged members to form strong bonds with each other which helped reduce “flake” rates.
- **Special one-time events** such as happy hours or movie nights helped organizations recruit new members through a fun activity. Training events were used to ease members into activities that may be intimidating, such as canvassing.

Larger groups tended to offer all three types of events, while small groups tended to focus on regularly scheduled events. Organizations should adopt strategies that fit their needs.

## ENCOURAGING ATTENDANCE AND PARTICIPATION

Organizations identified several general strategies for encouraging attendance and participation.

- **Make an activity fun.** “Anything social draws people to an event.” Examples of social events include: (1) “Doors and Draughts” — volunteers gather at a local pub following canvassing; (2) Ice cream socials following canvassing; (3) Postcard writing parties featuring wine and cheese or desserts.
- **Maintain a positive social media presence.** As one of our millennial group leaders explained, “If it’s not on social media, it didn’t happen.” Posting festive photos of members on Facebook, or other social media, encourages others to volunteer for the next event or take actions, such as phone banking, on their own initiative. For most organizations, Facebook is the most important platform, however, Instagram and Twitter are effective as well.



- **Give members discrete tasks.** To help with activities or events, ask members to take on discrete, but doable, tasks. Discrete tasks include checking people in, taking photographs/video, making name tags, or bringing a food or beverage.
- **Methods to invite members to an event.** Organizations used several methods, each with its advantages, to invite members to an event. Facebook allows members to see who else is interested in an event — this encourages more members to participate. Eventbrite or Evite offer the advantage of tracking attendees and providing a headcount. In addition, by requiring invitees to RSVP, organizations felt that Eventbrite and Evite reduced “flake rates.” Some organizations also used email to cater to members who do not regularly view Facebook.
- **Personal Outreach.** Irrespective of the event, personal outreach will boost attendance. Recruit more active volunteers to call, send a text or email to other members encouraging them to attend. This is particularly important for new members.
- **Provide Feedback.** One way to increase membership motivation is to announce at meetings or on an organization's Facebook page the number of doors knocked, money raised, or the number of postcards written. In addition, leaders can relate anecdotal stories affirming the positive effects an organization’s volunteers have had on a given campaign. Positive feedback inspires volunteers to stay involved and do more.
- **Think about the membership ladder.** Some groups imagined levels of membership involvement like steps on a ladder. Activities on the lowest ladder step tend to be easier; activities on the highest step require more time and commitment. Canvassing, for example, is a top of the ladder activity. It entails a significant time commitment and can intimidate new members. Rather than asking new members to canvass, consider starting them on something easier — something on a lower rung. Eventually, they may be comfortable taking the next step up the ladder. Offer a variety of activities at each ladder rung. This allows volunteers to choose activities (1) based on their degree of desired involvement, and (2) that reflect their comfort levels.

Examples of events and where they may fall on the membership ladder include:

<b>Level 1</b>	Membership meetings, happy hours, movie nights, informational talks, hearings and rallies, making flyers and posters
<b>Level 2</b>	Postcard parties, texting, helping with meeting or event setup and logistics, attending trainings as well as working group meetings.
<b>Level 3</b>	Phone banking, working the polls, helping a voter registration drive, researching a topic.
<b>Level 4</b>	Canvassing, hosting a fundraiser, taking a leadership role in the organization.

- **Overcome the Flake Rate.** Members are more likely to show up for events if they are personally asked to attend, required to RSVP, assigned to a team, or paired with an

experienced canvasser. These techniques help create a greater sense of commitment. Grassroots organizations that organized the Virginia unified canvassing day paired volunteers and created carpooling groups. They found these methods very successful in ensuring people actually attended the event.

- **Schedule events to match members' interests.** Organizations should offer activities that match their members' interests. Poll members on their interests by creating a questionnaire with google forms or survey monkey. Solicit feedback on Facebook and at membership meetings.

## RECRUITING NEW MEMBERS

Virginia grassroots organizations found it challenging to recruit committed volunteers, especially for leadership roles. In 2018, many are examining ways to increase volunteer commitment.

Greeting new members and following up with them is critical. Find a volunteer to fill the role of Recruitment Coordinator or Greeter. The job would entail:

- Greeting potential and new members at events;
- Capturing contact information for the email or listserv;
- Encouraging them to fill out an interest form and direct them to interest related activities;
- Connect them with members who have similar interest;
- Assigning a “buddy” to encourage their participation; and
- Following up.

Here are a few more tips for recruiting new members:

- Ask members to add friends to the organization's Facebook page and encourage them to attend events.
- Give members ownership of projects.
- Encourage members to attend the leadership meetings and pitch ideas.
- Recruit new members with skill sets needed by the grassroots organization or campaign the organization is supporting. Consider reaching out to professional organizations, universities, faith groups, etc. to expand membership and skill sets.

## FINAL THOUGHTS

We hope our experience in the Virginia 2017 House of Delegates elections will help grassroots organizations channel the enormous energy of their volunteers to elect progressive candidates not only in Virginia but in other states as well. We have seen that despite the odds, volunteers committed to better governance and progressive causes can shift the trajectory of campaigns. We believe that:

***“Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change we seek.” –Barack Obama***

Please contact the Virginia Grassroots Coalition if we can help in any way with tools, contacts, or suggestions: [vagrassrootscoalition@gmail.com](mailto:vagrassrootscoalition@gmail.com).