

School Board Campaign Planning Template

*Internal planning document for Staff & Governance

Step 1: Map your school board, community & local

Mapping your School Board:

District/Seat	Term Expires	School Board Member Name	Ally, Neutral, or Opponent?	Other relevant information

What seats/districts will you focus on? What seats will help you build or strengthen your majority?

Local Association Mapping:

- Organization Capacity

Building/Committee	Rep/Chair	% Active	% PAC	% Cell	% Email

- Communication Tools

Tool	Administrator(s)	# of Subscribers/Likes/etc.

- Engaging Your Leadership

How will we engage the candidate on our policy priorities and the campaign work we are doing? Who will be the primary point of contact?

What roles for member leaders will we have on the campaign? How will we recruit them?
How will we communicate/update each other?
How will we celebrate and create community?

- How are decisions made? Is it spelled out in our constitution & bylaws?

Who is on the interview team? How are they chosen?
How are recommendations approved?
How are budget decisions made?

- Legal: Consult with your Government Relations Department ASAP

Do we have PAC money? How do we access it? How can we spend it? What are the contribution limits? Who does the reporting?

Do we have dues money committed for member communication? If not, is there a crisis fund or re-appropriation of budget line item we can use?

What are the coordination rules?

What authority lines do we need to use?

Do we need a lawyer to approve items/literature we create?

Are there certain vendors we have to use?

Community Mapping:

- Make a list of all the organizations and influencers that care about your public schools and/or work on local elections. (Page 14 of Participant Handouts could be helpful)
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- Take that list and put them on that X Y axis (template provided on page 13 of Participant Handouts)
 - Think about group’s assets (email lists, PACs, etc) and ability to get involved in elections (tax status).

Group Name	Group Assets and Tax Status

- What groups and influencers will you try to form coalition with? Why?

Group Name	Why form a coalition with them?

Step 2: Goal Setting

Election Data & Vote Goal: Make sure to use data from the past 3 elections cycles for similar electoral years. For example, if the election is taking place during a presidential election cycle, you want to pull data from other presidential election years.

Year	Turnout	Registration	Turnout %

Formula to calculate your Vote Goal:

Step 1. Election Year Turnout % = Total Votes Cast / Total Voter Registration

Step 2. Projected Turnout % = Sum of Previous Election Year Turnout % / Number of Elections

Step 3. Projected Voter Turnout= Current Voter Registration x Projected Turnout %

Step 4. Vote goal for two candidates*= Expected Voter Turnout x .52

Vote Goal for three candidates*= Projected Voter Turnout/3+1

***viable candidates, add 5% cushion**

- **Vote Goals:**
 - Candidate X
 - Candidate Y

Member Voting History:

***contact your state affiliate GR department on how to access this data**

Year	General/Primary	% Members Voted

Members that live in District:

***contact your state affiliate GR department on how to access this data**

District	Members from Local	Members from other Locals	Retirees

Internal Goals:

- _____ new volunteers
- _____% of members voting
- Increase PAC fundraising by_____

Step 3: Campaign Message

Message: Why does this election matter to voters? Why does this election matter to members*?

What message structure will we use (triangle, tully box, RCN)

*these may not be the same messages

Step 4: Vote Contact Tactics

How will we talk to voters? How will we talk to our members?

Tactic Examples: Canvassing, phone banking, direct mail, handwritten letters/postcards, texting, paid digital ads, 10-minute building blitzes, worksite one-on-ones, and organic social media posts

Tactic	Date	Target Audience	What is being communicated?	When is it being communicated?	Who is responsible?

Step 5: Budget

Budget: *make sure you consult with your state affiliate GR department to make sure you are spending money and reporting correctly

Item	Description	Dues/PAC	Cost

Step 6: Timeline

Important Dates (plug these dates into the timeline below or google calendar/template of your choice):

- Candidate Filing Deadline
- Primary Election Day (include early voting, mail ballot requests/return deadlines)
- General Election Day (include early voting, mail ballot requests/return deadline)

- Holidays/school breaks
- Popular community events
- Candidate Recommendation Process Interviews/Votes etc.
- Recommendation announcements to members/public
- Monthly Building Rep Meetings
- Association events that are good opportunities to talk to members about election or recruit volunteers
- Events/activities you have promised candidates to turn members out for

Timeline:

Month	Activity and Dates within Each Month
April	
May	
June	
July	
August	
September	
October	
November	