

I want to run for office... now what?

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Prepared for Main Street
Alliance

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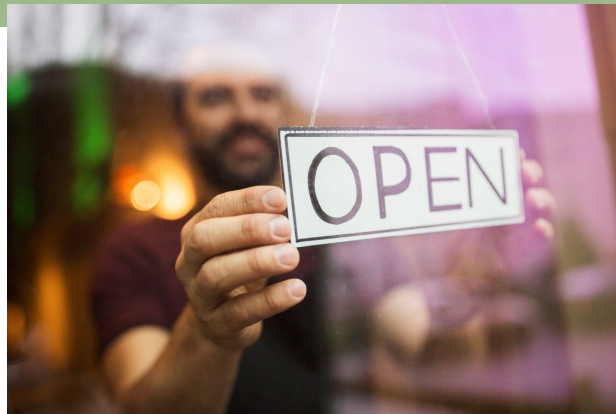
- **Educate.** We engage in research that helps to prioritize and frame issues important to small business owners. We educate policymakers, join coalitions, and work to change the narrative of true small business owners.
- **Organize.** We work with true small business owners to fight for common-sense policies that work for all small businesses and their employees.
- **Run for Change.** We provide small business owners seeking to run for public offices and or elected leadership roles with training, campaign support, and network building.

Educate. Organize. Run for change.

MSA is the nation's leading organization for true small businesses. We support local communities to push grassroots initiatives that work to create a more just economy and inclusive society.

Your donation helps us to build a more just economy and inclusive society.

That means a donation to MSA helps economically vulnerable communities by investing in local strategies that support true locally-owned small businesses, enhancing economic opportunities that improve the quality of life for all.





Introductions - 45 seconds

- Your name
- Your business
- What your business does
- Favorite song

Meet the Presenter

Our program is led by Brent Tercero, an accomplished advocate and political professional with extensive experience in the credit union movement and local government. Brent's expertise in legislative advocacy and campaign management will provide you with invaluable insights and guidance throughout the training.



A close-up photograph of several wooden puzzle pieces scattered on a light-colored surface. The pieces are in various orientations, with some showing the interlocking shapes. The lighting is warm, creating soft shadows and highlights on the wood grain.

Expectations and Outcomes

By the end of today's session, you will be able to:

- Identify the necessary first steps to legally run for office
- Recognize what campaign staff you will need
- Build a campaign budget
- Establish a fundraising network
- Create a voter universe and ask for their vote

A close-up photograph of several wooden puzzle pieces scattered on a light-colored surface. The pieces are in various orientations, with some showing the interlocking shapes. The lighting is warm and focused, creating soft shadows and highlights on the wood grain.

Norms for our session

- Be respectful
- Engage
- Be curious, ask questions, and seek to understand
- Make space for others
- Cameras on whenever possible

Agenda

- Review
- Paperwork and Preparation
- Campaign Team
- Budget
- Fundraising
- Universe Building
- Voter Contact
- Endorsements



Business Plan = Campaign Plan

→ Market Research = Election Research

- ◆ Past elections
- ◆ Fundraising statements
- ◆ Voter sentiment (social media, traditional media)

→ Business Plan = Campaign Plan

- ◆ Goal/Mission = Candidate Statement
- ◆ Raising capital = fundraising
- ◆ Attracting customers = voter contact
- ◆ Customer Reviews = total votes



A hand is shown at the top right corner, holding a single sheet of white paper. Below the hand is a bar chart consisting of six vertical stacks of white paper. The stacks increase in height from left to right. The background is a plain, light-colored wall and surface.

Paperwork & Preparation

Paperwork and Preparation

- Just like starting a business, there is paperwork involved in becoming a candidate
 - ◆ Establishing your election committee
 - ◆ Declaring your candidacy
 - ◆ Filing for tax ID
 - ◆ Opening a bank account
 - ◆ Ethics filings
 - ◆ Campaign/Candidate Manuals
- **EXTREMELY IMPORTANT** – find out from your city clerk or county registrar what officially marks your candidacy



Starting your candidacy

→ Establishing your election committee

- ◆ To start fundraising, talking about your candidacy, or otherwise prepare for your election, you'll most likely need to open up a committee.

→ Declaring your candidacy

- ◆ Separate from your election committee, to officially become a candidate in many jurisdictions, you'll have to file an intent to run for office.



Starting your candidacy

→ Filing for tax ID

- ◆ In order to open a bank account, you'll need a tax ID from the IRS. There are special designations for campaign committees or political organizations.

→ Opening a bank account

- ◆ **BEFORE ACCEPTING ANY DONATIONS**, you must open a bank account. This is critical for keeping track of all of your contributions and expenditures.



Starting your candidacy

→ Ethics filings

- ◆ Otherwise known as “conflicts of interest”, many offices require you to report things like your income from your job, major stock holdings, non-personal gifts, and other income.

→ Campaign/Candidate Manuals

- ◆ Look for your local “rulebook”. These campaign or candidate manuals will be necessary to understand. You should make time to read through it yourself.



Paperwork and Preparation - Research

Questions?





Building your Team

Campaign Team

- When you started your business, who helped you? What roles did you need to fill?
- Think/Pair/Share



Campaign Team

→ As you start building out your campaign team, these are some of the roles you need to consider

- ◆ Candidate
- ◆ Advisors/Kitchen Cabinet
- ◆ Treasurer
- ◆ Campaign Manager
- ◆ Fundraiser
- ◆ Voter Contact Manager
- ◆ Social Media Manager



Candidate

- The Candidate is the single most important campaign “staffer”.
- Everything begins and ends with you.
- Your staff and volunteers will only work as hard as you do.
- Many campaigns fail not because of staff, but because the candidate has not given the necessary effort to win.



Advisors/Kitchen Cabinet

- 3-5 informal roles, but incredibly important
- Your kitchen cabinet can be:
 - ◆ Community leaders
 - ◆ Trusted friends
 - ◆ Business owners
 - ◆ Political leaders
 - ◆ Spiritual leaders
 - ◆ Anyone else that can build your legitimacy as a candidate, but most importantly, they must be someone you trust



Treasurer

- Your treasurer will keep track of all of your contributions and expenditures.
- While they don't have to be a "professional", you should ensure that your treasurer is willing to become familiar with all of the necessary campaign finance rules and laws, even if they are a volunteer.
- **YOU SHOULD NOT BE YOUR OWN TREASURER.**



Campaign Manager

- For most of your campaigns, the only paid staffer you're likely to have is a campaign manager.
- They are incredibly important not just to handle the day to day operations, but to be your surrogate if needed.
- Their role entails all of the campaign work that is not asking for money or contacting voters. That's your role.
- Experience is great. Affordability is also great.



Campaign Team

→ As you start building out your campaign team, these are some of the roles you need to consider

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- ◆ Treasurer
- ◆ Campaign Manager
- ◆ Fundraiser
- ◆ Voter Contact Manager
- ◆ Social Media Manager

→ Identify your Kitchen Cabinet – who are the 3-5 people you want involved in your campaign?

Share Out



Building a Budget





Building a Budget

- Filing fees and Candidate Statement
- Voter database
- Staff (campaign manager)
- Canvassing (materials, gas, food)
- Mailers
- Phonebanking (phones, platform)
- Lawn signs

Filing Fees and Candidate Statement



Filing Fees – Minimum \$150, but can be higher depending on jurisdiction

This fee covers the cost of your jurisdiction processing your paperwork and must be paid



Candidate Statement – plan for a minimum of \$2,000

Many states and counties send out voter information booklets ahead of the election. To publish your candidate statement, you must pay a fee.

This will be the only piece of information about you that ALL voters will be able to access

Voter Database

- Minimum \$2,000
- Many political parties offer access to a voter database
- There are sometimes independent databases, but their quality varies significantly
- Higher quality databases are often more expensive
- This is a necessary expense

Other Costs

- Staff - \$10,000 minimum
- Mailers - \$.60 per mailer
- Canvassing - \$1,000 - food for volunteers at a minimum
- Phone Banking - \$1,000 - food for volunteers at a minimum
- Lawn Signs - \$3 per sign



Building a Budget

Questions?



15 Minute Break





Special Guest

**Kayla Young, Former Small Biz Owner, and Elected
Leader (WV House of Delegates Member)**

SMALL BUSINESS OWNERS. SMALL BUSINESS VALUES.



Fundraising



How did you raise the funds to start your business?

- To open your business, where did you secure the financing needed?
- Did you have any “investors”?
- Did you self-fund?
- Did you get a loan?
- Did you crowdsource?
- Share Out



Funding a Campaign

- Fundraising is essential for any successful campaign
- Start early (within your jurisdiction's limits)
- Build out your small donor base
- Identify large donors
- Secure endorsements and funding



4 Circles of Giving

1. Friends/Family/Acquaintances
2. Ideological Supporters
3. Axe-to-Grind
4. Access to Power



Friends/Family/ Acquaintances

- Family
- Friends from School (High School, College, etc.)
- Friends from Church
- Friends from Civic Organizations
- Friends from past and present employers/businesses
- Others?



Ideological Supporters

- Labor Unions with close affiliation
- Chambers of Commerce with close affiliation
- Religious Affiliation
- Environmental Groups
- Small Business Groups
- Others?



Axe-to-Grind

- Previous political opponents to the current incumbent
- General opponents to the current incumbent
- Policy “losers”
- Others?



Access to Power

- Political Parties
- Labor Unions
- Chambers of Commerce
- Trade Groups
- Others?



Friends/Family/Acquaintances

Step 1

- Create a list of ten categories that fall into “Friends/Family/Acquaintances”
 - ◆ Examples include; High School, College, Rec League, Church, etc.
- For each category, list five names

Step 2

- Who are the groups (PACs) that give money to candidates in your election?
- Identify five groups that you want to pursue

A close-up photograph of an elderly person's hands, showing wrinkled skin and veins, holding a large number of small, light-colored coins. The hands are positioned in the center of the frame, with the fingers slightly curled around the coins. The background is dark and out of focus. Overlaid on the image is the text "The Anatomy of an Ask" in a bold, white, sans-serif font.

The Anatomy of an "Ask"



Making the Ask

When you sought funding for your business, what were the things you included in your pitch?

Anatomy of an “Ask”

1. Establish connection
2. Identify your opportunity
3. Provide the reason
4. Connect the reason
5. Make a hard “ask”



Establish Connection

- The person you are calling needs to feel connected to you.
- If they are a friend or family member, you may be able to establish this easily
- If they are a prospective donor of some sort, find out what they care about and highlight your similarities on that area



Identify your opportunity

→ What are you running for and when?



Provide the reason

- Why are you running?
What is it that you are trying to accomplish?
- This reason should be something that your prospective donor may care about in some way.



Connect the reason

- Why should the prospective donor care that you are running?
- This is where you make a direct connection to the donor. What is it that they want to see that you can help deliver?



Make the “Hard Ask”

- “That is why I am asking for your support in the amount of \$XXX.”
- You **MUST** have a specific dollar amount in your ask.



Anatomy of an “Ask”

1. Establish connection
2. Identify your opportunity
3. Provide the reason
4. Connect the reason
5. Make a hard “ask”

→ Questions?

→ Role Play



Voter Universe Building

Building Your Voter Universe

→ If you don't have an expert helping build your universe, a good way to do that is by accessing a voter database and looking for the following criteria:

- ◆ Voter history and High Propensity Voters

- Specific Voter History - Have they voted in the last three of your type of elections?
- General Voter History - Did they vote in the last primary?

- ◆ Political Party - do they identify with your party? Independent?

- ◆ Age

- ◆ Gender

- ◆ Geographic Area

→ This number = Voter Universe

→ The larger your universe, the more expensive voter contact will be, but the more voters you will reach

Voter Universe Building

→ Questions?





Voter Contact

Voter Contact



Direct Voter Contact

Canvassing
Phone Banking
Texting
Social Media



Mass Voter Contact

Mailers
Robocalls
Lawn Signs
Social Media
Website
Candidate Statement

Direct Voter Contact



Canvassing – high conversion rate; labor intensive



Phone Banking – less effective each year (<6% answer rate), but can be deployed easily and reach voters quickly



Texting – very low conversion rate; ability to reach thousands of voters in hours; with live platform, can be somewhat effective



Social Media – “sliding into DMs” can be a bit intrusive, but if used selectively, it can be effective

Mass Voter Contact



Mailers – expensive and highly ineffective; one of the most prolific ways to reach voters

“A voter must be able to understand your message in the time it takes them to walk from their mailbox to their trash can”



Website – effective for highly informed voters; the best way to control your message



Online/social media advertising – rules seemingly change each election cycle, but social media is a must



Lawn signs – ineffective generally, but can be strategically effective

15 Minute Break



Endorsements

Name _____

Signature _____

Date _____

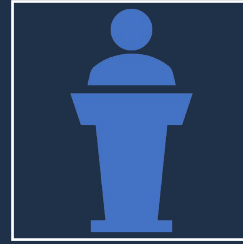


Endorsements



Endorsements are given based on the following:

- Name "ID"
- Viability (Fundraising)
- Ideological Alignment
- Track Record



Endorsements to seek

- Political Party
- Trade Associations
- "Cause" Groups
- Local Leaders

Q&A



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