Precinct and Ward Chair Resource Manual

Produced by the Grassroots Activist Support Committee
Democratic Party of Bernalillo County

Rev. January 2023

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Copies with previous revision dates are obsolete.

This manual is designed to support Democratic Party volunteers in
Bernalillo County and is based on the rules and practices of the
Democratic Party of Bernalillo County (DPBC) and the Democratic
Party of New Mexico (DPNM).

Modification of this document is prohibited without written permission
from the DPBC. Templates found in the appendices may be modified.

This document may be copied and shared with volunteer leaders.

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Table of Contents

Appendices are in DPBC Google Drive folders so sample documents may be downloaded and modified.

PC users: You may need to press Control-Right Click to activate the links to the Appendices depending on the version of your web browser.

Introduction

First, thank you for volunteering to put your Democratic beliefs into action by taking a leadership role in your ward or precinct in Bernalillo County. You are playing a vital role in building our grassroots organization in our precincts, wards, communities, and across counties in our state.

As grassroots organizers, we are interested in:

- Getting to know local Democrats
- Learning and addressing their concerns
- Building a network for discussing issues and
- Working together with like-minded persons and giving them the tools to successfully effect the change we collectively seek.

This creates the strong network that is essential in getting out the vote (known colloquially as GOTV) to elect government officials who will transform our hard work into actionable policies that reflect our Democratic platform.

Our values link the local and national levels of the Democratic Party. Democrats across our county, across our state, and across our country work together to achieve common goals. These goals are reflected in the party platforms defined at each level of participation, by the party members. There is a hierarchy that binds the party as we do our grassroots work.

This Manual Is Your Pathway to Developing or Enhancing Expertise in Your Role

This manual was developed as a resource for you, the grassroots leaders of the Democratic Party of Bernalillo County (DPBC). (We realize that party organizers in other counties can benefit from it too.)

- It has useful information for the newbie and veteran political leader, alike.
- It is intended to help anyone realize their self-expectations as a precinct or ward leader.
- It is a reminder that we are all in this together; that we can teach each other, and that we can learn from each other, by using this information.

This manual provides a roadmap for your success in key areas of Democratic Party leadership:

- Developing and growing your grassroots precinct or ward
- Recruiting and managing volunteer leaders and volunteers
- Effectively engaging your community

By applying the information and tools in this manual, you will become a more effective leader. You will be able to empower your volunteers and community more effectively. You will have the tools to encourage registered Democrats to exercise their right to vote. These skills can also minimize frustration and make you more efficient.

The DPBC realizes that it is not always comfortable to be new to a job, whether a career role or a volunteer role. We encourage you to recognize your trajectory as you gain experience in the role of precinct chair or ward chair.

Where Do I Need to Start?

Take a quick self-assessment of your knowledge of and comfort level in your role. Look at the model below. What is my current level of expertise in my volunteer role within the DPBC?

Figure i.1. Dreyfus Model of Competency Development

The Dreyfus Model – How You Build Skills

Novice: If you are a new precinct or ward chair, you have an exciting journey ahead. Much of the information in this manual may be new to you.

Advanced Beginner: As you absorb the information, you will move to Advanced Beginner, where you can take advice in context.

Competent: After a few election cycles, you gain real life experience and not depend as much on written instructions.

Proficient: You will be more comfortable at solving problems as you become Proficient. You can mentor others.

Expert: At the Expert level, your work becomes intuitive. You are a master.

Do not feel pressure to know all the answers when you are new to the role. Take time to develop your competency. Seek advice from a mentor. Ask for help. Relax and enjoy the role.

Other Resources Available

This manual offers both models for community organization and "how-to" tools. It contains 12 chapters and a host of appendices that provide a more detailed collection of information, resources, and forms to assist with the organizational nuts and bolts. Each chapter includes references to related information in the appendices, as well as links to other resources. Use it as a go-to reference, reading it from cover to cover, or looking up a specific topic to answer questions about specific aspects of the job.

The DPBC has your back in another way. Along with this electronic manual, we have developed an online training center with slides and videos to provide training to Democratic Party leaders and volunteers in each ward or precinct. The training modules and this manual support each other. Remember, there are always other party leaders and volunteers who are willing to answer your questions.

Reference Tools

At the end of each chapter, you will find a summary of appendices to this manual where you can find related references, resources, and toolkits.

Appendix A contains training materials produced by the Democratic Party. Developing your skills is essential to the success of our mission.

1. Democratic Party Structure and Governance

What Can I Learn in this Chapter?

- How grassroots work relates to the overall hierarchy of the county, state, and national Democratic parties
- How party rules guide what grassroots organizing volunteers can and cannot do
- The structure of the Democratic Party, including wards and precincts, as well as caucuses affiliated with the state party
- Detailed explanation of wards and precincts.

The Democratic Party Structure

As a volunteer at any level, it is important to know there are important reasons for all the things that volunteers and party leaders do.

- The Democratic National Committee of the Democratic Party (DNC) provides direction to all the state Democratic Parties.
- Each state party provides direction to all county Democratic Parties within the state.
- Each county Democratic Party is the closest link to the grassroots level of involvement.
- Party rules dictate what we can and cannot do in our specific roles.

The following diagram shows the relationships of each level of the party.

DNC
Democratic National Committee

~447 DNC Members
- All State Chairs and Vice Chairs
- ~200 elected by state parties (4 from NM)

Democratic Party of New Mexico

Executive Committee
Members
- State Chair
- Vice Chair
- CD 1, 2, 3 Vice Chairs
- Secretary
- Treasurer
- Young Dems Pres.
- Dem Women Pres.
- DNC Committeeman and DNC Committeewoman
- County Chairs
- Statewide elected officials on the SCC

State Central Committee (SCC)
Members
- Some elected by each county
- County Chair & 1st Vice Chair
- State officers
- 2 NM State Senators
- 2 NM House members
- 2 members of each affiliated organization (caucus)
- All statewide elected Dem officials

County Parties

Executive Committee
Members
- Chair
- Vice Chairs
- Secretary
- Treasurer
- Ward Chairs*

County Central Committee (CCC)
Members
- County Chair & Vice Chair(s)
- Ward* & Precinct Chairs
- Addt'l CCC members elected in some pcts
- Representatives of approved county caucuses

Wards
Bernalillo County
~70 Wards

Chair, Vice Chair, Secretary, Treasurer
- Elected at Ward mtg every 2 yrs

Precincts
Bernalillo County
~687 precincts

Chair
- Elected at Ward mtg every 2 yrs
- Addt'l officers optional

Grassroots of the party!

Figure 1.1. Levels of the Democratic Party

The Role of Rules in Party Governance

The Democratic Party governs itself and defines its leadership and operations by adoption of party rules at the national, state, and county levels. Rules of a higher level of the party control those of a lower level, and the lower levels of the party are bound by the higher level's rules. **(See Appendix B for links to rules.)**

The Role of the Platform in Party Governance

The platform is a statement of the party's core principles at each level of party organization. **(See Appendix B for links to platforms.)** The platform includes position statements on topics such as civil rights, education, health care, labor, etc. The state party platform is adopted at the State Pre-Primary Convention in even-numbered years.

The Role of Caucuses within the Democratic Party

A caucus is a group of Democrats united to advance a common interest or represent the interests of a particular group of Democrats. A group of at least 15 party members representing the state's congressional districts who choose to form a caucus must meet the Rules Committee requirements of

the state party. **(See Appendix B for links to caucuses. Details are provided in Section 10.2 of the "Rules of the Democratic Party of the State of New Mexico.")**

The Establishment of Precincts and Wards

A precinct is a neighborhood-sized group composed of approximately 750 registered voters regardless of party affiliation, with the boundaries designed by the county clerk and approved by the Secretary of State. The precinct is where the grassroots organization is built and where voter engagement takes place.

Prior to a new census, the county commission reviews precinct voter turnout in the previous year's general election. Precincts with more than approximately 750 voters may be split before the following year's primary and general election. After each census, the NM Legislature redraws Congressional and NM House and NM Senate districts. This may result in the creation of additional precincts drawn by the county clerk and approved by the Secretary of State, as well as the rearrangement of precincts within each ward.

Bernalillo County precincts represent about one-third of the voters in the state.

Wards are a creation of the Democratic Party of Bernalillo County. Wards are generally divided and numbered according to NM House Districts. There are usually two to four wards in each house district, depending on the number of registered Democrats in the district.

Precinct Chairs are elected at the ward and precinct meetings held in the spring every odd-numbered year; precinct chairs serve for a two-year term. To be elected as a chair, a voter must:
- Have been a registered Democrat, as shown on the official list of registered voters maintained by the county clerk, for at least 30 days prior to the election and
- Must reside in the jurisdiction in which he/she/they want(s) to hold office.

Ward Chairs (and related officers, such as a ward treasurer or secretary) are elected at the ward meeting, which occurs on the same day as the precinct meetings. The ward chair serves for two years and has responsibility for all precincts in his/her/their ward. To be elected as a ward chair, a voter must have been a registered Democrat, as shown on the official list of registered voters maintained by the county clerk, for at least 30 days prior to the election. The ward chair must reside within the ward boundaries in which he/she/they want(s) to hold office. Ward chairs have the power to appoint Democrats to vacant ward and precinct positions, whether the position was not filled during the last election or has become vacant for some other reason. **(See DPNM Rules, Art. IV, Rules 3.1.6, 5.2, 5.3, 5.4.)**

The Core Purpose of Wards and Precincts

Ward chairs and precinct chairs, working together, form the grassroots organization of the Democratic Party. Their primary purpose is threefold:
- Building relationships with Democratic voters in their wards and precincts by getting to know voters and their concerns
- Educating voters about elections and issues of concern to them and
- Encouraging and assisting as necessary voters to exercise their right to vote in elections.

The Structure of the Democratic Party of New Mexico (DPNM)

The State Central Committee (SCC) is the governing body of the DPNM. Members meet in late spring of odd numbered years to elect the chair, vice chairs, secretary, and treasurer, which become the Executive Committee of the DPNM; to approve changes to the Rules and Platform; and to conduct other business of the DPNM. The chair is the DPNM's chief executive with general management of DPNM affairs and election campaigns. The Executive Committee of the DPNM advises the chair on all matters assigned to it and performs duties delegated by the SCC. **(See Appendix B for more information about party organization and officers.)**

The Structure of the Democratic Party of Bernalillo County (DPBC)

All county, ward officers (including treasurer and secretary) and precinct officers are elected every two years in odd-numbered years.

- **Ward chairs** are elected at the ward meeting, as described above.

- **Precinct chairs** are elected at the precinct meetings.

- At large County Central Committee (CCC) members, determined by size of precinct, are elected at the precinct meetings.

- **Precinct chairs, any at large County Central Committee (CCC) members and ward chairs become part of the County Central Committee**. The CCC is the governing body of the county Democratic Party. Its members elect county party leadership (county chair, vice chairs, along with State Central Committee (SCC) members. The day-to-day operation of the DPBC is delegated to the Executive Committee, and the county chair serves as the DPBC's chief executive.

- County Party Rules Committee members are elected, one from each ward

- County Party Resolutions Committee members are elected, one from each ward.

Occasional Redistricting

Precinct boundaries occasionally are redrawn because of population growth and changes in voter participation. This process involves county clerks and the NM Secretary of State. Ward boundaries can change as the Democratic Party finds more efficient ways to group precincts for grassroots organizing. Redistricting following a census can also affect boundary decisions.

Reference Tools

Appendix B contains additional information about the organization of the Democratic Party at all levels, including links to Democratic Party Rules, a Table of Contents of the DPNM Rules, Platforms, a summary of the DPNM Platform, Committees, Caucuses, and related organizations.

2. The Roles of Ward and Precinct Chairs

What Can I Learn in this Chapter?

- Summarize your leadership role
- Explain how precinct and ward leaders are elected
- Contrast your precinct or ward activities from candidate activities
- Develop your team to meet your organization's strategic needs.

Functions of Grassroots Leadership

Grassroots leaders (ward chairs and precinct chairs) function as cheerleaders, administrators, and party leaders, undertaking a series of functions that require different skill sets. These skill sets are dependent on the interests, abilities, amounts of time they can commit to the job, as well as the prior and current levels of ward/precinct organization. This manual is both a stepwise analysis of how to build a stronger grassroots organization and is aspirational, given that progress often occurs in incremental steps.

Ward chairs and precinct chairs are integral parts of the leadership structure of the Democratic Party at all levels and of the Democratic Party of Bernalillo County (DPBC), in particular. They are the face of the Democratic Party on a neighborhood level, building relationships year-round to create brand loyalty for the Democratic Party and engaging voters in the political process. They are the connection between the people and the party, representing the concerns of their neighbors upward through the party and sharing information about what the party and its candidates are doing to address those concerns.

Election of Volunteer Leaders

As introduced in Chapter 1, ward chairs and precinct chairs are publicly elected party officials, elected to a two-year term by the Democratic voters in their ward or precincts each February or March in odd-numbered years. Precinct chairs and ward chairs automatically serve as members of the County Central Committee (CCC), which is the governing body of DPBC. They are expected to attend regular meetings of the CCC to conduct DPBC business and to be familiar with CCC rules and procedures. Ward and Precinct chairs can also serve on a variety of DPBC and DPNM committees and task forces. **(See Appendix B for lists.)**

How Does Grassroots Organizing Differ from Candidate Campaigns?

A candidate for office has the overarching goal of winning the election. The candidate's strategy is determined by what they need to do to win a majority or plurality of votes and it often results in voters being contacted multiple times to the point of election fatigue.

A vibrant grassroots effort is not only concerned with helping candidates to win elections; it is equally concerned with building long-term loyalty to the Democratic party by getting to know local

Democrats, addressing their concerns, and providing them with information about how to exercise their right to vote.

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Critical Guidelines for Supporting Candidates

- It is very important for grassroots leaders to understand that they cannot share information they obtain while canvassing with candidates, their staff, and volunteers.

- Candidates pay the Democratic Party to license VoteBuilder (the Democratic Party database) and must gather information for their campaigns independently of the Democratic Party.

- This does not prohibit grassroots leaders and other volunteers from also participating as volunteers in candidates' campaigns.

- Precinct Chairs and Ward Chairs are allowed to state a personal preference for a primary candidate, if they make clear it is a personal position rather than that of the Party.

- As a general rule, all canvassing and phone calls should be made between the hours of 9:00 AM and 9:00 PM. On Sunday, do not call before noon.

- It is ILLEGAL to place any printed material on or in a mailbox. Violators could face severe penalties.

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This manual concerned with traditional ways of relationship building through canvassing and more contemporary ways of outreach such as social media. As discussed briefly in **Chapter 6,** this approach works better with some groups than others. Strategies to engage hard-to-reach groups will be explored in subsequent training modules.

To increase voter turnout effectively for Democratic candidates, grassroots leaders and their teams work throughout the year to build relationships and get to know the voters in their wards and precincts. **(See Chapters 6, 7, and 8 for relationship building.)** By gaining personal knowledge of voters and providing them with useful information on issues, voting, and events on topics that matter to them, one builds relationships and trust that makes it easier to get out the vote. Isolated GOTV efforts that are visible only at election time will be less effective.

Steps New Chairs Should Take to Develop their Organizations

Building a successful grassroots organization is a major undertaking that may happen quickly or over a period of many years. Some wards have no grassroots leaders, no precinct chairs, an incomplete complement, or new precinct chairs who previously have not been involved in party politics. Some have a full complement of seasoned volunteers who know Democrats in their precincts like the backs of their hands. In addition, ward chairs and precinct chairs are volunteers with limited time and disparate interests and skill sets that they bring to their jobs. All these variables affect plans for engaging voters at the grassroots level.

It is the exception rather than the rule that all grassroots functions specified earlier can be performed all the time; rather, grassroots leaders must consider their resources, the stages of development of their wards and precincts, and the strengths and interests of the grassroots leaders.

There is no one way to organize at the grassroots level or to determine what functions should be undertaken. The importance is to develop both short and long-term plans that will move the group forward in its efforts to inspire, activate and engage local Democrats.

How to Build Your Team

Look through the table to learn the tasks that need to be performed in your team.

Identify what tasks you can and cannot do. Determine what tasks you like to do.

Assess if any tasks are currently being performed by volunteer(s).

Recruit volunteers for specific tasks that are unfilled.

The ward is the larger organizational unit, with the ward chair serving as the administrator, overseeing and delegating certain functions to special committees or precinct chairs. Business meetings usually occur at the ward level, as do organization of canvasses, and educational and social events. Wards will often work together to host programs with common legislators and about issues of common concern to their constituents. The ward chair may also work to recruit precinct chairs and other volunteers for leaderless precincts.

Precinct chairs are responsible for participating in ward meetings, recruiting volunteers, and execution of canvasses and GOTV activities in their precincts.

Having discussed this division of responsibility, it is important to note that ward chairs and precinct chairs often divide responsibilities based on their interests and available time to commit to their volunteer roles.

We believe certain functions are essential to this endeavor, although they may be performed at lesser rates depending on the level of grassroots organization. Others can be undertaken as capacity grows. **(See Chapter 5 for a more detailed discussion.)**

Wards and precincts that do not have a history of effective leadership may be limited in the functions or tasks they will be able to perform initially. Building a mature organization may take several years. The following table identifies useful functions, or tasks, that grassroots leaders perform, along with suggested ways to assign the responsibility for each function.

Major Tasks	Who Could Perform
Assemble resources	Ward and precinct chairs
Hold a meeting; schedule additional meetings	Ward and precinct chairs, assisted by a volunteer who understands the process and software for scheduling
Build capacity by recruiting Democrats to fill unfilled ward and precinct positions	DPBC chair and ward chairs, with input from block captains and active volunteers
Train or arrange for training of ward and precinct chairs	DPBC and ward chairs
Analyze the ward/precinct's level of development and create an annual grassroots action plan	Ward chair and precinct chairs at an annual planning meeting
Train block captains and volunteers	Precinct chairs with help from the ward chair and DPBC
Connect with the people in your ward/precinct and build loyalty to the Democratic Party through canvassing	Precinct chairs/block captains and other volunteers who are outgoing
Host educational and social events build the Democratic Party	Ward chair/precinct chairs and volunteers who are outgoing and good planners; some wards have an Event Committee
Engage in Get Out the Vote (GOTV) activities during elections	Precinct chairs usually responsible for organizing GOTV canvassing and delivery of election information. Outgoing volunteers do the canvassing. In some cases, the ward chair will draft templates for consistent messaging throughout the ward.
Conduct a post-election analysis	Ward chair prepares voter turnout analysis. Precinct chairs report progress on canvassing, distribution of flyers and getting voters to the polls. Volunteers who are good with data analysis are a plus!
Develop a system to regularly communicate with voters: newsletters, phone calls and texting, social media, websites, etc.	Can be centralized at the ward level and precinct chairs can also plan local communications. Multiple wards in one state house district may want to share resources for communications. Block captains may wish to personalize communications to develop long-term relationships. **(See Appendix N for samples of diverse types of communications and Appendix P for different systems of communication.)**
Create/maintain records; can be a local database (preferred) or paper records	Ward and/or precinct chairs and/or any volunteer experienced with spreadsheets and who have good organizational skills can develop and maintain a database that provides local voter data.
Planning for succession	Ward chairs and precinct chairs

Figure 2-1. Building Your Team: Major Tasks and Who Could Perform Them

Reference Tools

Appendix B lists Democratic Party roles, responsibilities, powers, resources, and contact information.

Appendix N contains samples of diverse types of communication.

Appendix P describes various systems for communication.

3. Assembling Resources

What Can I Learn in this Chapter?

- Determine what information to obtain from outgoing leaders, including voter contact information and data

- Assess resources available to you as a new leader.

There are numerous resources available to assist grassroots leaders in their jobs. Some will be available from outgoing precinct chairs and ward chairs. Others are available through the websites of the DPBC and DPNM. Identifying the resources you will need and how you obtain them will be dependent on the ward and precincts' prior levels of organization and stages of development.

Step 1 – Ask Outgoing Ward and Precinct Chairs for their Resources
The more developed and better-organized ward chairs and precinct chairs may have extensive information about their jurisdictions including:
- training materials
- forms for various functions
- email listservs of Democratic voters within their jurisdictions
- contact list to for text communication with Democrats
- a local database of Democratic voters.

Some outgoing ward and precinct chairs will automatically provide incoming chairs with this information. If you have not received it, contact the outgoing chair to determine whether such information exists. If it does, arrange for a transfer. It is important to obtain resources from all outgoing grassroots leaders, even if replacements have not been identified. Thus, a ward chair should obtain it from outgoing precinct chairs within the ward, if the outgoing chairs do not have replacements.

Step 2 – Obtain Guiding Documents
Upon election to office, ward and precinct chairs must assemble materials and obtain training to understand the structure of the Democratic Party and the role of grassroots leaders in it. You may have obtained some or all of this information from outgoing ward or precinct chairs or you may have to obtain this information on your own. You are already on the way by reading this manual. **(See Appendix C for instructions about how to obtain a map of your ward or precinct. See Appendix D for instructions about how to get a list of all registered Democrats in your ward or precinct.)**

The DPBC electronic newsletter, "The Blue Review," is published twice each week. It provides information on topics of interest to all Democrats, as well as free advertising for precinct and ward events. We strongly recommend that all grassroots leaders subscribe to this. **(Appendix C provides a link to subscribe.)**

Essential Documents to Obtain

- A map of your ward or the precincts in your ward **See Appendix C.**
- A printable list of all registered Democrats in your ward or precinct. **See Appendix D.**
- Subscribe to the Blue Review Newsletter. **See Appendix C.**
- Training materials that can help me. **See Appendix A.**

Reference Tools

Appendix A provides instructions about how to access training materials, along with a list of materials currently available. There is a link to download this manual, along with links to individual chapters and appendices.

Appendix C contains instructions about how to obtain a map of your ward or precinct, along with information about how to find precincts in your ward, look up the ward your precinct is in, along with email addresses for Ward and Precinct Chairs. Subscribe to the Blue Review and access other materials essential to performance of your job as a ward or precinct chair.

Appendix D contains instructions about getting trained to pull your own lists on VoteBuilder, the program to access the DNC database. It also contains instructions about how to obtain a list of registered Democrats in your Ward or Precinct.

4. Building Capacity: Recruiting and Training

What Can I Learn in this Chapter?

- Consider best practices for recruiting precinct chairs and ward chairs
- Consider best practices that ward chairs can train their precinct chairs
- Provide effective training for block captains and other volunteers.

Recruiting and training volunteers go hand in hand. This chapter includes tips for recruiting and training key precinct leaders (chair and CCC members) and key precinct volunteers (block captains and other volunteers). Here are the key sections:
- Common recruiting and training tasks for both ward chairs and precinct chairs
- Training precincts chairs
- Recruiting key precinct volunteers
- Training key precinct volunteers.

Occasionally, ward and precinct elections will result in a complete set of elected party officials, including a ward chair, precinct chairs, and CCC members. Sometimes, one or more positions will remain unfilled. The ward chair may appoint people to unfilled positions within 30 days after the election. Thereafter, the chair of the DPBC may fill vacancies, usually at the recommendation of the ward chair. **(See DPNM Rules, Art. IV, Rules 3.1.6, 5.2, 5.3, 5.4.2.)**

Although all grassroots leaders can recommend persons to fill vacant positions, it is usually necessary to actively recruit volunteers. This job falls to the ward chair.

Recruiting Precinct Chairs, CCC Members, and Other Volunteers

This section applies to recruiting by both ward chairs and precinct chairs. The following sources can be tapped in the search for a precinct chair or CCC member, as well as other volunteers:

- Lists of Coordinated Campaign volunteers or DPBC volunteers in the precinct **(See Appendix D for instructions about how to request a list of Coordinated Campaign volunteers and Appendix E for a list of volunteers in the DPBC TeamBuilder system. See Appendix D for instructions about how to request a list if you cannot pull your own lists.)**

- Democrats in the precinct who have a strong voting background, as well as a high 2020 DNC Volunteer Propensity ~~Civis Liberalism~~ Score **(Obtain a list through VoteBuilder. See Appendix D.)**

- If you are in touch with the previous precinct chair or the previous ward chair, ask them to share any contact information they have for active Democrats within the precinct who have volunteered to help in the past.

- Check with caucuses in the DPNM and coalitions within DPNM and DPBC. Check with the DPBC to identify CCC members or SCC members reside in the ward or precinct. **(See Appendix B and Appendix E.)**

- Drive around the precinct and look for bumper stickers or Democratic political signs, such as the blue Progressive Democrat sign. Note the address and perform or request a VoteBuilder Quick Look-Up that shows registered voters at that address. **(See Appendix D for a discussion of the Quick Look-Up function in VoteBuilder.)**

- Contact dedicated Democrats you know within the precinct to see if they will assume a leadership role or if they know somebody who might be interested. Ask your family, friends and neighbors, and members of your other organizations. Then ask them for their recommendations for other potential volunteers.

- Contact other political groups such as the Indivisibles, Progressive Democrats, and others. Although they may not be willing to release names of members in the precinct, they may allow you to place a notice of ad in a newsletter or make an announcement at a local meeting.

- Once you have collected lists of potential volunteers, call them, or knock on their doors to see if they are interested in becoming a grassroots leader or in coming to a meeting to learn about the job.

- Follow up with one or more phone calls.

- Appoint or recommend appointment of precinct chairs and CCC members as they are identified. **(See DPNM Rules, Art. IV, Rules 3.1.6, 5.2,.5.3, 5.4.2. To recommend an action or change information, see Appendix C.)**

Training Precinct Chairs

New ward and precinct chairs should plan to attend live training and/or download training in how to be a grassroots leader soon after their election. Some experienced ward chairs run training sessions for all new precinct chairs. For less organized wards and precincts, chairs may wish to access live and/or online training materials prepared by the DPBC. **(See Appendix A for a discussion of online training resources, including threads for training ward chairs, precinct chairs, and other volunteers. See Appendix P for training in various systems of electronic communication.)**

Recruiting Key Precinct Volunteers

The Importance of Recruiting Block Captains and Other Volunteers

Unless you have unlimited time and talent yourself, assembling a team with special abilities to help you is imperative. While ward chairs are responsible for recruiting precinct chairs and County Central Committee (CCC) members to fill vacancies, precinct chairs are responsible for identifying block captains. Block captains will canvas or telephone a limited number of registered Democrats on their streets or in their neighborhoods (both to determine issues about which voters are concerned and to get out the vote). Precinct chairs also help to identify other volunteers to assist them with organizational efforts at the ward or precinct levels.

The volunteers you recruit will be your best tool to reach out to all parts of your precinct to identify and mobilize your fellow Democrats.

Based on the interests, skills, and level of engagement of the volunteers you develop, you may be able to create a ward or precinct team to effectively manage the other aspects of ward and precinct work. Below is a list of roles that chairs have found useful. You should feel free to achieve the objective of organizing your precinct or ward in a way that reflects your own leadership style, your skills and comfort level with the various tasks an effective chair must perform, and the resources available at both the ward and precinct levels.

Examples of Roles Volunteers Can Fill

- **Block Captain** contacts and organizes smaller groups of voters and volunteers in his/her/their own neighborhood within your precinct. A block captain will often assume responsibility for canvassing neighbors about issues of concern to them and distributing information about elections.

- **Communications Manager** uses MailChimp, Constant Contact or another email or text management system to allow newsletters, voting flyers, and other information to be distributed to residents.

- **Data Manager** keeps a record of ward or precinct data and voter information collected.

- **Event Committee** plans social and GOTV events to engage both reliable and unreliable voters.

- **Newsletter Editor** creates newsletters on a regular basis or as needed with information on upcoming elections, current issues, candidates, relevant local events, etc.

- **Outreach Volunteers** take on door-knocking, canvassing, distributing flyers, phone-calling, and texting, as needed.

- **Phone-Tree Organizer s**ets up a phone tree among volunteers for rapid sharing of important information.

- **Researcher** investigates current issues, candidates, relevant local events, etc.

- **Social Media Coordinator** creates a social media presence for the precinct and/or works with the ward chair to support ward-level social media announcements sent to precinct residents.

- **Webmaster** builds and maintains a website for your precinct and/or works with the ward chair to include a precinct presence in the ward website (if one has been developed) that may be used to post announcements, link to other Democratic websites, and share contact information for the ward/precinct.

Recruitment Strategies

- **Ask for a List of Former Volunteers.** The easiest is to ask the past chair of your precinct for their list of volunteers and people who had previously expressed an interest in volunteering, if you have not yet received this information. Sometimes this information will have been turned over to the new ward chair who should distribute it to the precinct chairs. If you do not know who the past precinct chair was, contact your ward chair for that information. If you receive such a list, call each person to see if they will continue to serve. If a database was previously created for your precinct, you should have received a copy of it. It may contain notes about people who are Democrats who vote in all elections and voice strong support for guiding principles of the Democratic Party and those who have said they might be willing to volunteer.

- **Attract New Team Members – requesting lists of people to contact.** If you are unable to locate a list of past volunteers, or if you would like to recruit more volunteers, follow the steps outlined in this chapter to identify new precinct chairs and CCC members.

- **Attract New Members – contacting people on your lists.** Once the lists are assembled, begin to email call, or visit people on your lists. Explain that you are their neighbor and a registered Democrat. Tell them that you are their local precinct chair and you are calling or visiting to see if they would be willing to assist by becoming a block captain or other volunteer. **(See Appendix H for sample documents to use in recruiting volunteers.)**

  If you go door-to-door to speak with potential block captains or other volunteers, you may wish to create a flyer or letter to introduce yourself. **(See Appendix H for model documents.)** If a person is not home, you can tape a flyer to the door or other conspicuous place.

  As you begin to talk with people, sharing a brief, well-crafted "public story" can be an especially effective way to motivate others to join your team. This technique is based on the Public Narrative Leadership model developed by Marshall Ganz, an organizer for Cesar Chavez.

Most people you contact will be Democrats who vote in all elections and voice strong support for the guiding principles of the Democratic Party, so they will most likely be happy to talk to you. Stress that the Democratic Party volunteers are a wonderful group of people, volunteers will be trained, before they contact their neighbors, and the work of a block captain or other volunteer should not take too much time.

Checklist for Canvassing to Recruit Volunteers

- Painter's tape.

- Walk list, specifying active voters and activist status from Civis.

- Introductory letter stating the benefits of volunteering.

- Beware of dogs!

- Decide if you will leave letter or a flyer when no one answers the door. You may wish to return and have an in-person discussion, rather than leave it up to the person to contact you.

- Door hangers are an effective alternative to taping materials or leaving under door mats.

- **You can face severe penalties if you place materials in a mailbox or on a mailbox. Using a mailbox for private use is illegal.**

How Many Volunteers Should I Recruit?

There is no magic number of volunteers; however, the more volunteers you recruit, the less burdensome the work for each will be. After assessing your knowledge and openness to performing the tasks outlined in Chapter 2, recruit to ensure you have someone identified to handle each task. Many volunteers will also reduce your workload.

Holding an Event to Recruit Potential Volunteers

This section provides a roadmap of how to plan an initial event to recruit precinct volunteers. Some ward and precinct chairs find hosting an event an effective way of building camaraderie among potential volunteers and, thus, increasing the likelihood that they will volunteer. Others have found it more efficient to dispense with planning and holding a larger event.

In person or by phone, flyer, email, postcard, or letter, introduce yourself to the active Dems you have identified. Invite them to join you for an event to hear more about how they can get involved and talk about how you can help each other activate your neighborhood. This could be a simple house meeting, house party, BBQ, potluck, coffee shop event, etc. **(See Appendix H for model documents.)**

Your Initial Event: Here are some ideas for how to use your first event effectively for engaging volunteers:

- Have an agenda ready

- Collect all contact info on a sign-in sheet. **(See Appendix J for a model sign-in sheet.)**

- Discuss why you are working in the Democrat Party

- Introduce everyone

- Ask people to share their reasons for getting involved and their ideas on how to activate the ward or precinct

- Use a form to learn about people's skills and interests **(See Appendix K for a model interest sheet.)**

- Identify upcoming elections and explain how volunteers can help. A ward chair might be seeking one or more precinct chairs. Precinct chairs might be seeking block captains. If seeking block captains, divide the precinct into blocks and ask volunteers to be **block captains**. They will help contact and build relationships with the Dems on their blocks. Training will be provided for all recruited individuals.

- Bring ward or a precinct map. Have attendees mark the map with their home addresses.

- Ask your attendees to identify other precinct residents they know who might be interested in getting involved (they could look through a VoteBuilder list of All Dems or All Registered Voters to identify friends and neighbors)

- If people do not commit initially to become volunteers, make follow-up phone calls, as are necessary.

Training Block Captains and Other Volunteers

As precinct chairs identify volunteers within their precincts, it becomes necessary to provide training. Typically, training focuses on canvassing, but there are many other tasks where training is either needed or helpful. Here is a list of training that is often requested by ward and precinct chairs, as well as volunteers, but remember that there are opportunities for one-on-one help sessions. Ward chairs often have some of this expertise and if they do not, they can find someone who does.

Task-specific training for grassroots organizing and outreach:

- DPBC has an extensive library of online training materials. Registration is required on the DPBC website. Most are available on YouTube. Some in-person training can be held, as well.
- The National Democratic Training Committee (NDTC) offers a wide range of one-hour mini-sessions and longer curricula on topics geared to grassroots activists, candidates and their campaign teams, and others. Go to traindemocrats.org for a list of current classes.

Software for communicating with each other and with voters is often readily available on YouTube. This includes "how-to" training about:

- Newsletters (Constant Comment or MailChimp)
- Websites (development and maintenance)
- Social media platforms **(see more discussion in Chapter 10)**
- Virtual meetings (such as Zoom)
- Chat groups
- Shared document files (such as Google Docs).

Training that is helpful "behind the scenes":

- Spreadsheets (such as Excel)
- Word processing
- Graphics
- Virtual meetings.

There are distinct types of canvasses, and each has nuanced training. **(See Chapter 8 for discussion of the distinct types of canvasses and the mechanics of each.)**

The ward or precinct chair may wish to conduct a general training session once all block captains are identified, or the ward or precinct chair may wish to train individuals in person and distribute materials as individuals come on board. Training could also be a formal, in-person class, a virtual module that could be self-paced, or simply a one-on-one interaction **(See Appendix A for a discussion of training materials, along with Appendix I for a discussion of documents and samples of scripts, report formats, and canvassing instructions.)** Ward or precinct chairs who conduct group training may wish to incorporate a role-playing segment in which trainees get to practice canvassing on each other.

It is always fun to combine a training function with a social gathering involving food, giving volunteers the opportunity to get to know each other, and socialize before or after the training session.

How volunteers will be trained should be discussed when the annual action plan **(see Chapter 5)** is developed.

When block captains or other volunteers are trained and have received their walk lists and scripts, they should be given a timeframe to complete the canvass and return the walk lists.

Reference Tools

Appendix A contains a list of training materials, along with information about to access them.

Appendix B contains information about caucuses and coalitions within the DPNM and DPBC.

Appendix C contains links to the DPBC website for the appointment of ward officers, precinct chairs, and CCC members. It also contains a link to enable change of this information.

Appendix D contains instructions about how to request or pull a list of Coordinated Campaign Volunteers, how to request or pull a list of reliable voters with high 2020 DNC Volunteer Propensity Score (a group is perceived as likely to volunteer), and how to determine names of registered voters at a particular address (Quick Look-Up).

Appendix E provides instructions about how to obtain a list of DPBC activists within your Ward or Precinct.

Appendix H contains materials and sample documents for recruiting block captains and other volunteers.

Appendix I contains information about creating a personal narrative or story that can be used by precinct chairs to recruit volunteers, as well as information about canvassing to find volunteers.

Appendix J contains a model sign-in sheet for potential volunteers attending a recruitment event, along with materials for planning an event.

Appendix K contains a model skills and interest sheet for potential volunteers attending a recruiting event.

Appendix P contains information about various forms electronic communication and training in how to establish and use them.

5. Planning for the Coming Year

What Can I Learn in this Chapter?

- Assess Democratic Party and election timeframes that impact precinct and ward planning

- Bring your volunteer leaders together, and assess their skills and capacity

- Schedule regular meetings to gain momentum

- Assess your organization's level of maturity

- Identify your community's diverse characteristics

- Ensure inclusion strategies

- Create a meaningful annual plan to engage the community

- Fund your activities for the year.

Importance of Democratic Party and Election Calendars in Planning

Assess election calendars, as a first step to developing your precinct or ward's meeting and activity calendar.

Both the Democratic Party and the state operate on two-year election cycles. **(See Appendix L for the DPNM Two-Year Schedule and a Generic Planning Calendar that melds both the DPNM Calendar and the Election Calendar.)** In developing an annual plan for your precinct or ward, be aware of these calendars and schedule activities so that they do not conflict with but complement these calendars.

Party Elections: For example, ward and precinct chairs are elected in the spring of odd-numbered years. The first order of business is to recruit (if necessary) and schedule training for new ward and precinct chairs. The next order of business is to plan for the upcoming year.

Political Elections: Most elections held in odd-numbered years in Bernalillo County are non-partisan:

- City, municipal, and village elections

- School board elections for Albuquerque Public School and Community College of New Mexico

- Albuquerque Metropolitan Arroyo Flood Control Authority District Elections

- Conservancy District Board Elections for the Middle Rio Grande Conservancy District Election (open to property owners only) on the first Tuesday after the first Monday in June.

As a result, there are no primary elections in these years. Thus, the spring and summer of odd-numbered years can be devoted to building the Democratic Party base by canvassing or hosting

events. Even-numbered years have a primary election schedule and a pre-primary convention, both of which have implications for the planning process.

Schedule Meetings

Initial Planning Meeting: After the election and initial training of ward and precinct chairs, the ward chair should hold a meeting of precinct chairs, along with interested block captains, and other volunteers. The purpose of the meeting is to assess the level of ward and precinct development, identify the number of functions that the ward and precincts were able to fulfill over the past two-year cycle, and develop a plan of engagement for the coming year.

If there is a new leadership team, contact the old team to obtain information about activity and records, if you have not already received it.

Holding Ward or Precinct Meetings: As a ward or precinct identifies leaders, it will be important to schedule regular meetings. There is no one way to do this, although, to some extent the nature and frequency of meetings is determined by level of development, the number of leadership positions that have been filled, and the level of activity the ward or precinct wants and is able to support.

Some wards and precincts hold meetings solely for business purposes, with meetings for Democratic voters, such as candidate forums, legislative prequels, legislative wrap-up sessions, picnics, and parties held separately. Some combine both functions in the same meeting, inviting leaders, volunteers, and registered Democrats. Sometimes ward chairs may want to have joint meetings for topics of mutual interest of the wards. Set up meetings that work for you and enable you to have fun at the same time!

The Ward/Precinct Team and Its Stages of Maturity

Your ward and precinct contain enthusiastic activists with special talents to help manage the needs of the grassroots organization and increase the efficiency of your operation. The division of labor will make the work easier and more fun. It is your job as ward chair and precinct chairs to recruit and build that team.

It is important to assess your starting point as a new ward or precinct chair. There are precincts in Bernalillo County that have had strong leaders for years and there are precincts that have not. This section helps you to get started, no matter where your starting point is.

With this in mind, each precinct chair, old or new, should do a simple assessment of your precinct's current capabilities. It may be helpful for all precinct chairs in your ward and ward chair to do this together.

Set Realistic Expectations
based on your organization's maturity

Chairs in most precincts

Active Committees

History of active participation from community

Chairs in some precincts

Some community recognition of precinct activity

Few volunteer leaders

No history of outreach of events
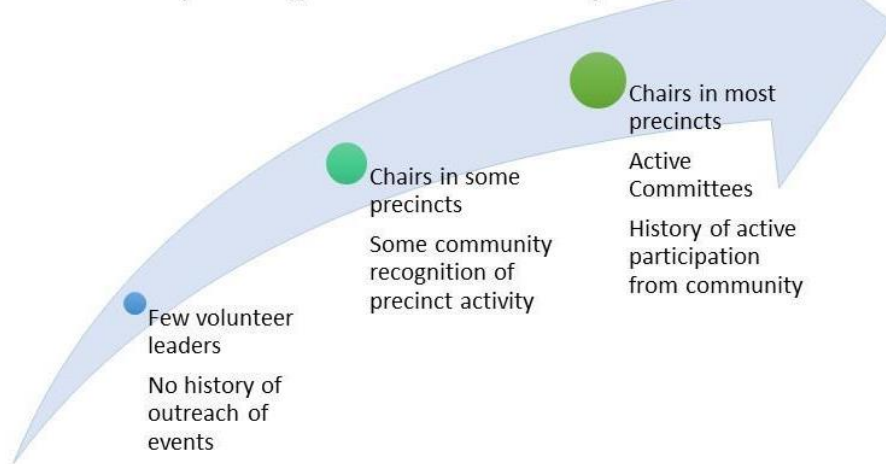
Figure 5.1. Levels of Ward Maturity

Brainstorming is an effective tool to use for finding a solution to a specific problem. In this case, the "problem" would be to determine the precinct's current capabilities to reach out to voters in the coming year. The brainstorming "solution" could describe the probable amount and type of outreach you can do with your current number of volunteers and with voter information gathered (or not) from the past. Here are some questions to get you started:

Evaluate Existing Volunteer Capacity
1.   How many volunteers do we have?

2.   What are their skillsets?

- Get Out the Vote (GOTV) canvassing (phone calling, texting, going door-to-door, etc.)
- Deep canvassing to build an issue-based relationship with voters
- Communicating with voters in your precinct (meetings, newsletters, flyers, etc.)
- Building records of voters in your precincts.

3.   Based on this answer, what outreach do we have capabilities for right now?

- Canvassing
- Deep canvassing
- GOTV canvassing
- Newsletters
- Events.

4.   What skillsets do we need to recruit this year, for the activities in the following year?
Is there a way to "share" volunteers among precincts in the ward, at least temporarily?

Recruit Volunteers

5.   How many volunteers with which skillsets do we need, by what date, to be minimally successful?
  - Work with ward chair and other precinct chairs to define recruiting activities to meet your goal.
  - Go out and recruit.

Identify Your Precinct's Diverse Characteristics

Whether your ward and precincts are a few blocks in diameter or miles of country roads, the size, population density, demographics, voting history, geography, and other characteristics will affect how you organize.

Here are some factors to consider when planning outreach at the grassroots level:

Density: Can volunteers easily reach residents by walking, or is it necessary to drive? With very low density, it may be advantageous to use email and phone calls to set up invitations for coffee, tea, walks, wine and cheese, or other precinct social functions where you can organize and distribute literature. In higher density neighborhoods, it may make sense to recruit block captains who accept responsibility for their own streets and maybe a few contiguous streets.

In areas with apartment buildings, it may make sense to recruit a volunteer to accept responsibility for the entire complex, or an individual building in larger complexes. Apartment superintendents or rental agents may be willing to share information about Democrats who are registered at but no longer live at the complex. Some apartment complexes have common areas that residents can reserve for meetings to register voters, host a candidate meet-up, or apply for absentee ballots.

Demographics: Demographics can significantly affect your work, both in terms of your outreach strategy and the issues your ward and precinct's residents are concerned about. For example, many elderly people or retirement communities may require help with absentee ballots or getting to the polls. At the same time, retired residents may have more time to volunteer in various ways. Demographics can also dictate whether to schedule precinct-wide events and/or to canvas door-to-door.

Transiency: Longstanding neighborhoods may have better social networks to draw on, more registered voters and correct names and contact info in the VAN system. Transient neighborhoods may need more voter registration outreach and collection of names and contact information.

Community hubs/meeting places: Are there central locations in your ward or precinct, including common rooms of large apartment complexes, community centers, senior citizen centers, which can be used for registering people to vote, tabling, or flyering to reach a broad swath of precinct residents?

Geographical elements: This includes ditches, roads, highways, parks, community centers, boundaries of state and national parks, etc. These may determine the boundaries of workable units in your precincts.

Rural/Urban: Bernalillo County has a residential mix that ranges from the very urban to the very rural. Does your ward/precinct have a mix of urban and rural land use? Does this present a challenge to you when planning block walks for your volunteers? Take this into consideration as you plan your neighborhood walking strategy.

Ethnic and Cultural Diversity: All people living in the United States fall on a continuum of the beliefs formed by their ethnic heritage, their upbring, and social connections. It is essential that volunteers do not stereotype someone based on their heritage or appearance. Asking and listening is what helps to understand a person's beliefs and values, and to build relationships and trust.

People may hold strongly to the beliefs resulting from their ethnic heritage, religion, and upbringing. These can influence how they perceive social issues such as abortion, access to health care, violence, and crime, etc. Their beliefs and life experiences can affect their perception of their ability to have a voice in the community, as well as their acceptance of certain aspects of the Democratic Party Platform.

It is important to understand and respect diversity and its impact on Democratic Party organizing by appealing to the party's respect for all human beings and respect for their life choices, while emphasizing our support for common human values and the needs of human beings, which enable us all to thrive. These include the availability of meaningful work that provides a livable wage and benefits; the ability to love and marry those we love; the ability to have families, and the ability to provide food, education, housing, health care, and childcare for our families.

Education and Literacy Diversity: It is vital that written material be inclusive of those who have low-literacy skills. People in your community will have a range of reading at the 5th grade level to the 12th grade level. People at all reading levels prefer easy-to-read information. Verbose information can be confusing and does not capture the attention of your community.
Google gives priority to web pages written at the 5th to 6th grade level. They know that people want material that is easy to read. **(See detailed discussion in Chapter 10.)**

Nationally, 10% of Americans are functionally illiterate. Recognize that this rate may be higher in some parts of your community. That means that over 10% of people who receive a flyer on their doorstep will not be able to read it. Infographic cards can be an alternative. For this reason, door knocking and talking to people is more effective.

Languages Spoken: While English and Spanish are the primary languages spoken in the Albuquerque urban area, statistics say that over 30 different languages are spoken in homes here. What are the primary languages spoken in your ward and precincts? You may need to recruit volunteers who can speak and/or read, write, and speak in Spanish, various Native American languages, languages spoken in Southeast Asian countries, and others. Look to neighborhood associations or homeowner associations to get more information about languages spoken in your ward/precinct, for a start.

Socioeconomic Factors: Poorer working families, and especially poorer single parent working families, while required to be given time off on Election Day, may be less able to vote for a number of reasons. They may require more support and education about early voting and absentee voting.

Age: Younger voters can be cynical about traditional party politics. They tend to be upset by constant partisan bickering and the belief that the major parties and their elected leaders do not care about issues of utmost importance to them. Unfortunately, many vote with their feet by refusing to vote at all. Although the DPBC does not currently have capacity to engage younger non-voters, it is essential to strategize about ways to convince them that their voices can and will have very real policy implications. Consider addressing this issue in your annual plan or joining a coalition to engage younger voters.

Inclusion: We have outlined some of the diversity in our constituents and their living situations. It is essential that people feel that they are part of your outreach. Inclusion ensures that your outreach provides equal access to opportunities and resources for people who might otherwise be excluded or marginalized. This may include people with physical or mental disabilities. It may include our Lesbian Gay Bisexual Queer and Transgender (LGBQT) neighbors. It includes sensitivity to those who are a different gender. We reflect on inclusion of those who have different beliefs for issues such as abortion rights, euthanasia, civil rights, women's rights and men's rights. It all boils down to a core value of respect for others.

Inclusion Strategies

A primary inclusion strategy is to recruit volunteers who reflect the diversity of your ward, precinct or even a segment of the community. Constituents feel more comfortable when approached by people who look like them, believe what they believe, and have similar life experiences.

One example of an inclusion strategy for print material is to include a series of diverse images. A banner across the top of a flyer may include people of different races and ethnicities, a gay family, or those in alternative living situations. We recently saw a candidate website with the candidate facing two men and his back turned to the woman. We are reminded that images send a strong message and that we must select them carefully.

Create a Meaningful and Realistic Plan of Engagement

The first step in creating your action plan is to assess the stage of your ward or precinct's development and the extent to which you have been able to elect or appoint a full complement of leaders, including a ward chair, precinct chairs, and CCC members. **(See Appendix F for a form to assess past ward or precinct activity for affective planning. See Appendix G for of the planning process and planning templates.)**

When one or more precinct chair positions remain vacant, the group may decide it does not have the capacity to engage in many activities within that precinct for the coming year. Alternatively, if a precinct has volunteers but no leader, the ward chair may be able to organize volunteers to canvass and engage in GOTV activities.

A good start is to create a plan for the coming year. Any action plan should indicate the activity to be performed, the person or persons who perform each step, materials needed to complete the step, training needed for volunteers, the time framework for performance of the activity, and evaluation of the activity.

In developing the action plan, consider barriers to voting, such as:

- Lack of knowledge about elections and candidates
- Lack of transportation or inability to take time off work
- Language barriers
- Belief that all politicians are the same
- The fact that elected officials and candidates do not or traditionally do not, look like, speak like, or speak about issues of concern to them
- Belief that voting does not matter because no politician will improve the life of or care about issues important to the person who does not have a strong voting background.

Fund Activities for the Coming Year

All party activities have a cost, whether in materials and labor donated by volunteers or paid for by the donations of others.

It is a good practice to have a donation jar at all planned activities. Although donations may be small, they add up over time.

Certain expenses may be reimbursed by the DPBC. **(See Appendix C for information about how to seek grant reimbursement.)** In addition, the DPBC awards grants of up to $200 per grant to fund activities at the grassroots level.

Reference Tools

Appendix C contains links to the grant application form and instructions about how to apply for and receive reimbursement of expenses incurred pursuant to a grant.

Appendix F contains a checklist to use both in evaluating accomplishments over the past year and in planning for the future.

Appendix G contains a discussion of the planning process.

Appendix L contains the DPNM the two-year political calendar and the generic planning calendar under which we operate.

6. Building Relationships with Democratic Voters in Your Ward/Precinct through Canvassing

What Can I Learn in this Chapter?

- Plan basic "build your base" canvassing activities
- Implement "deep canvassing" to further engage voters
- Orient to GOTV canvassing.

'Build Your Base' Canvassing

Canvassing is a process of contacting people in your ward or precinct, either by telephone or walking. Each canvass targets a particular audience (e.g., registered Democrats, registered Democrats under 25, decline to state voters, etc.). Each canvass has a specific purpose, e.g., to identify volunteers and to get out the vote (GOTV). A particular script (set of questions) is developed to achieve the canvas purpose. A walk or call list is developed to list the names and phone numbers/addresses of people to be contacted and to record answers to the questions asked.

When conducting this initial canvass, it is often nice to prepare a written document that the canvasser can leave if nobody is home **(See Appendix H for sample letters of introduction and Appendix J for sample invitations to events.)** It can be very effective to ask the voter to a ward or precinct social event like a picnic or event to meet elected officials. If an election is approaching, you might also consider combining the canvass with an election flyer or introductory letter with information about the election.

Deep Canvassing

Deep canvassing focuses on listening to issues of major concern. Inquiry may also be made about how individuals are happy or unhappy with what the Democratic Party. Deep Canvassing, in which the voter is front and center, is also known as a relationship building. **(See Appendix I for more information about how to prepare for this type of canvass, and Appendices A and I for training and support materials to conduct this type of canvass.)**

Information about this type of canvassing and walk lists of Democrats to contact may be handed out during volunteer training in Chapter 4. If not, the precinct chair should distribute walk lists and a canvass or phone script to block captains and other volunteers who are willing to call or canvass.

Get out the Vote (GOTV) Canvassing

The goal of GOTV Canvassing notifies your community of election details and encourages people to vote. It can be done through phone banking, text banking, and flyering or writing postcards. **(See Chapter 8 for full details about GOTV Canvassing.)**

Critical Guidelines for Outreach

- Precinct chairs and ward chairs are allowed to state a personal preference for a primary candidate, if they make clear it is a personal position rather than that of the Party.

- As a rule, all phone calls should be made between the hours of 9:00 am and 9:00 pm. On Sunday, do not call before noon. Canvassing should conclude before sunset.

- **It is illegal to place any printed material on or in a mailbox. Violators could face severe penalties.**

Reference Tools

Appendix A contains training for canvassers.

Appendix D contains information about how to order or pull a walk list, as well as the distinct types of canvasses, scripts, and report formats applicable to each.

Appendix H contains sample documents for volunteer leaders to introduce themselves to voters when they perform a walking canvass.

Appendix I contains information about the different types of canvasses, along with sample scripts, report formats, and instructions applicable to each.

Appendix J contains sample invitations to events.

7. Planning Educational and Social Events to Build Community

What Can I Learn in this Chapter?

- Plan and execute events that engage voters
- Use a 10-step planning process for smooth sailing
- Plan virtual events
- Appreciate the benefits of co-sponsoring with other precincts and wards.

Plan and Execute Events that Engage Voters

As wards and precincts build capacity, they may consider events, either individually or in combination with other wards or precincts, to educate and build community among Democratic voters. Some will be primarily educational, such as introducing Democrats to candidates, elected officials, and legislative issues of concern at the local, state, and national levels. Some may be purely social, such as potluck gatherings, picnics, and other parties to celebrate electoral victories. Some will contain elements of both.

Appointing an event chair can alleviate time commitment for precinct and ward chairs. A committee to assist in planning and implementation will bring different viewpoints and enhance the planning process.

Ten-Step Process for Planning Events

1. **Identify your target population**

It is helpful to segment your region and select a target group for your event. Targeting everyone is expensive and takes a great deal of promotional resource, both in printing and flyering. Precincts and wards may target younger voters or voters who do not vote regularly. What group do you want to engage? Some precincts and wards hold events to reward regular voters. One ward targeted non-regular voters across all precincts for one event. Another ward targeted three entire precincts with the lowest voting rate for their event.

2. **Set an objective of how many people will be engaged**

Determine how many people are in the target population. Is this a realistic number to invite? Set an attendance goal. It is normal to experience a 2-5% response rate. Do not feel discouraged because you are still reaching a larger population with your promotion—it is great public relations. You may experience as much as a 10+ percent response rate if your Registered Democrats are highly engaged.

3. **Determine an activity appropriate for your target population and your budget**

Picnics are very traditional events for Democrats in our region. Breakfast events are also an option; morning timeframes can provide cooler temperatures. Some organizations hold events at

breweries to attract younger voters. Open houses can draw a local crowd and are great for apartment dwellers. Some organizations host intimate candidate forums and speakers on important social issues. Many organizations do not have the funds to provide free food and drink. They are creative with volunteer contributions such as potlucks.

4. Establish a realistic budget
Grassroots organizations can host events at little to know cost. Consider that volunteers can print flyers and signs, avoiding costly print shop fees. People can bring tables and chairs. You can sort through a re-gifting box for raffle items. Many of these items can be obtained by precinct or ward volunteers or donated by local business.

5. Establish a promotion plan
Flyering is the soundest option to get your message about the event in front of your target audience. Email is a low-cost option, but not everyone will open an email. Expect a 20% open rate. Posting on neighborhood websites is also low-cost, but it is impossible to target promotions are your select audience.

Next to food, promotion can be the costliest expenditure of financial and volunteer resource in your budget. Get bids for printing to find the best price. Grassroots organizations are not required to use union printers, though some organizations may wish to support their union shops. Consider two-sided printing if you want to distribute bi-lingual flyers. Designate the organization responsible for flyer or brochure printing at the bottom of your flyer. For example, "Designed and Printed by Ward XYZ of the Democratic Party of Bernalillo County."

6. Create a project plan
A simple milestone chart outlines each action step and when it should be complete. This will avoid chaos and stress. Action steps include facilities, presenters, audio-visual, signage, etc. It also includes promotion timelines and getting promotional materials designed and printed in advance of the promotion cycle.

7. Recruit volunteers
Consider the resources needed for flyering and promotion. Volunteer commitments for the event itself should be assigned in advance and include set up, greeters, early voting information, voter registration, food servers, people movers, and tear down.

8. Create a donation plan
Seek cash and in-kind donations from your volunteer leaders to help offset costs. Consider asking for donations from local businesses, as appropriate. Putting out a donation jar during the event, can generate more revenue than you imagine. Everything helps to offset the cost of the event.

9. Implement your event
A well-planned event will reduce stress on everyone. Advance planning of the event layout, flow of people, and advance set-up create a positive experience for attendees. Chaos decreases the credibility of your organization and doesn't promote the goal of GOTV.

10. Evaluate the results in the next election cycle

Hold a volunteer meeting soon after the event to evaluate what went well and what aspects of planning need improvement for future events. Your event may not have been perfect, and you can learn lessons for future events. Evaluation criteria include number of people reached in the promotion, number attended, response rate (number attended divided by number reached), and budgeted expenditures to actual. Finally, did your event have an impact on voting behavior if that was the objective? A feel-good event is as important for getting your population to recognize your Democratic Party efforts.

(See Appendix J for sample materials to plan events.)

Park Permits May Be Required

- The City of Albuquerque requires a park permit when serving food, renting a porta-potty, having a microphone and speaker, electricity, or bounce-house for kids. The application process is simple and mostly free. There are charges for electricity and bounce houses.

- Check with your city for guidelines on park use. Alcohol is prohibited at parks in most jurisdictions.

Planning a Virtual Event

Speaker events are held on platforms such as Zoom or GoToMeeting. They can be held live or recorded for viewers to watch according to their own schedules. Virtual meetings are convenient and low-cost. The downside is that people are not able to mingle and have a networking experience. They may not have a sense of community in a virtual setting. The platform also limits groups who do not have access to the required technologies. Therefore, they may not be as inclusive as in-person meetings.

In response to COVID-19 pandemic restrictions, virtual events that are advertised in The Blue Review and open to the public have been well attended and immensely popular. Many of these events are recorded on the DPBC YouTube Channel and posted for viewing by people who have not been able to attend in person.

(Appendices C and P contain information about how to schedule, view, and run a virtual event.)

Co-Sponsoring Programs to Maximize Resources

Decisions include the nature of the event, whether it will be co-sponsored with other wards, whether it will be open to the public or limited to members of sponsoring wards, how people will be notified of the event, and what the budget will be.

Reference Tools

Appendix C contains a links to schedule and host a Zoom meeting if you do not have a Zoom account. Also find information about how to view Zoom meetings saved to the DPBC YouTube channel.

Appendix J contains sample documents for planning events.

Appendix P contains information about how to facilitate a Zoom meeting.

8. Getting Out the Vote (GOTV)

What Can I Learn in this Chapter?

- Employ common goals of the candidate campaigns and party grassroots efforts in your outreach

- Register new voters to expand your base

- Plan outreach around election day and early voting dates and times

- Plan and schedule GOTV outreach

- Use effective telephone and text strategies

- Use VoteBuilder to support last-minute canvassing.

The Difference between Candidate Campaigns and Democratic Party Activities

A candidate for office has the overarching goal of winning the election. The candidate's strategy is determined by what they need to do to win a majority or plurality of votes, and it often results in voters being contacted multiple times to the point of election fatigue.

A vibrant grassroots effort is not only concerned with assisting candidates to win elections; it is equally concerned with building long-term loyalty to the Democratic party by getting to know local Democrats, addressing their concerns, and providing them with information about how to exercise their right to vote.

Sharing Information with Candidates Is Prohibited

It is very important for grassroots leaders to understand that they cannot share information they obtain while canvassing with candidates. Candidates pay the Democratic Party to license VoteBuilder (the Democratic Party database) and must gather information for their campaigns independently of the Democratic Party. This does not prohibit grassroots leaders and other volunteers from also participating as volunteers in candidates' campaigns.

This manual is primarily concerned with traditional ways of relationship building through canvassing and event planning. As discussed briefly in Chapter 6, this approach works better with some groups than others. Strategies to contact hard-to-reach groups will be explored in subsequent training manuals. To increase voter turnout for Democratic candidates effectively, grassroots leaders and their teams work throughout the year to build relationships and get to know the voters in their wards and precincts. **(See Chapters 6 and 7.)** By gaining personal knowledge of voters and providing them with useful information on issues, voting and events on topics that matter to them, one builds

relationships and trust that make it easier to get out the vote. Isolated GOTV efforts where residents see you only at election time will be less effective.

Depending on your grassroots level of organization and the annual plan your ward or precinct develops, you may undertake one or two canvases per year. If two, the first is likely to be a Deep Canvass, in which you introduce yourself to Democratic voters and spend time discussing issues of greatest concern to them. If done well in advance of the election, materials can be developed that speak to their issue concerns.

If the ward's development is such that it decides not to mount two canvasses, a canvass to discuss issue concerns may be combined with a canvas to educate voters about the upcoming election and get out the vote. **(See Appendices I for a discussion of the various types of canvasses.)**

Election Timelines
Elections in Bernalillo County follow a cycle through even and odd years.

Odd-year elections are typically local and non-partisan. Candidates do not run on a party line; thus, there are no primaries. These include:
- Municipal Elections (Mayor, City Council, Ballot Measures, Municipal and Village)

  School Boards (APS, CNM)
- Albuquerque Metropolitan Arroyo Flood Control Authority District
- Conservancy District Boards (Middle Rio Grande Conservancy District) Election for property owners only. On the first Tuesday after the first Monday in June

Even-year elections focus on state and federal elected roles:
- State government positions include governor, treasurer, lieutenant governor, secretary of state, treasurer, attorney general, and auditor
- New Mexico State house and senate positions
- Bernalillo County Commissioner and Sheriff elections
- Presidential elections every four years
- Primary Elections are held the first Tuesday in June to select party candidates
- General Election the first Tuesday in November for most national, statewide, and countywide positions, NM House and Senate elections

Voter Registration
One way of building one's base is to register people to vote. **(See Appendix M for a more detailed discussion of voter registration).**

Voters may register to vote in many ways:
- Online at the Secretary of State's website
- In person at the county clerk's office
- Through a Third-Party Voter Registration Agent

- At public state offices, such as the Department of Motor Vehicle, the Human Services Department; and public libraries, colleges, and universities, and at organized voter registration drives.

Although voters may register to vote prior to their 18th birthday, the registration is activated so that they can vote if they will be 18 by the day of the election. There is one exception to this general rule. Voters who will turn 18 by the date of the general election, may register and vote in a primary while they are still 17.

Restoration of Voting Rights

Convicted felons may have their voting rights restored after the imposed judgment and sentence is discharged by the State of New Mexico Corrections Department. **(See Appendix M for more information.)**

Voting Options

(See Appendix M for a more detailed discussion of ways to vote and supporting documentation. Portions of this appendix may be printed as information sheets to educate people about ways to vote.)

There are three ways voters may cast a ballot:

- **Absentee Ballot** available to any registered voter upon application. No special conditions, such as absence from the state on Election Day, are required.

- **Early voting** at designated locations during early voting periods

- **Voting on Election Day** at any voting location.

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Voting Dates and Times

You can get the important dates and deadlines for upcoming elections, as well as information on absentee ballots and early voting, from the Bernalillo County Clerk's Office.
(See Appendix M **for contact information.)**

- https://www.bernco.gov/clerk/current-and-upcoming-election-information.aspx

- (505)-243-VOTE (8683)

The following general deadlines are important to be aware of to make sure every eligible voter in your ward or precinct can participate in elections. Verify these dates through the Bernalillo County Clerk's website.

- Voters can apply for an absentee ballot any time before the election. They may apply Online at the Secretary of State's website. The clerk will begin mailing ballots out 28 days prior to the election.

- Make sure to provide absentee ballot applications and instructions to Democratic voters who may not be able to access the polling locations or who live in nursing homes and in assisted and independent living residences in your precinct starting about 60 days prior to the election.

- The last day to register to vote is 28 days prior to the election, though NM now allows same day registration (registration on the day you vote) at early voting locations. Same day registration on Election Day is available for statewide elections, which are held in even years.

- Early voting is available, the first day of early voting is two - four weeks prior to the election, depending on the election, and early voting generally continues through the Saturday prior to the election.

- The last day for the county clerk to receive applications for Absentee Ballots is 5:00 pm on the Thursday before the election.

- Election Day Voting: Polls are generally open from 7:00 am to 7:00 pm. Absentee Ballots must be returned to the county clerk or a voting location before 7:00 pm on Election Day to be counted (only the voter, an immediate family member, or a caregiver can deliver the ballot).

Plan and Implement Activities to GOTV

Develop or obtain written election materials: Many wards or precincts develop election flyers and or election editions of newsletters to inform voters about the election and candidates. During the Covid-19 pandemic, voters turned to absentee and early voting, necessitating information about how to vote safely. Some voters need information about candidates' positions on issues; some will vote only for Democrats and need to know which candidates are Democrats, especially in non-partisan elections. **(See Appendix O for samples of these documents, along with messages for text delivery.)**

Keep flyers concise: There is a need to keep the flyer or newsletter as concise, informative, and financially viable as possible, often by limiting it to a single sheet, printed on both sides. Content can be expanded by printing on legal-sized paper or adjusting spacing and font size. Different elections may demand distinct types of flyers.

Deliver flyers or newsletters: Once a flyer has been developed, a method or methods of delivery must be determined. For registered Democrats who vote reliably in each general election, electronic delivery via email or text message is probably sufficient to remind them to vote.

If your ward or precinct is in the early stages of development and you have not engaged in deep canvassing or other types of canvassing prior to the election, your access to email addresses and cell phone numbers through the VoteBuilder system will be limited. VoteBuilder can be of limited use for electronic contacts because cell phone numbers and email addresses are often missing or inaccurate. You should consider delivering the flyer or newsletter as part of a canvassing campaign.

Talk to Voters

More than TV ads, emails, recorded calls, or yard signs, a face-to-face conversation with someone is more effective in persuading them to vote.

Canvass to get out the vote: If you have not already done so through the annual planning process, plan a canvass to get out the vote. The breadth and depth of this plan will be determined by the number and time commitment of grassroots leaders, block captains, and other volunteers within the ward.

Steps include:

- Determine the script (a written dialogue and set of questions) you will use in talking to voters. If your ward or precinct has been previously canvassed to determine issues of concern to voters, a straight GOTV canvass, in which voters are asked if they have a plan to vote and plan to vote a straight Democratic ticket, should suffice. If not, you may wish to conduct a hybrid canvass, in which you ask voters to discuss issues of importance to them and then hand them a flyer and discuss their voting plans.

- Second, determine which voters you will target in the canvass. If you have not conducted a deep canvass, you may wish to target all registered Democrats. If you have limited volunteers and do not have reliable contact information to deliver the flyer/newsletter electronically, you may wish to target only reliable voters. If you have conducted a canvass and can deliver the flyer or newsletter electronically, you may wish to target those voters who do not vote reliably in the general election.

- Arrange with your VoteBuilder team to prepare a walk list. **(See Appendix D for information about how to request a walk list.)**

- Make copies of the flyer/newsletter so that you can leave a copy at every house visited by canvassers. Alternatively, ask the candidate's campaign to provide the flyers in sufficient quantities.

- Distribute walk lists, scripts, instructions about how to canvass and when to return walk lists, **(See Appendix D for an explanation of different types of canvasses, scripts, and report formats. See Appendix for I for Sample Instructions for Canvassers and a sheet for precinct chairs to record information received during the canvass.)**

- Provide voters with information or assistance in voting as requested.

GOTV Canvassing Toolkit

- Painter's tape

- Voter Information Flyers with Early Election and Election Day Details

- Walk list

- Script, with list of details for voting information

- If there is a dog loose in the yard, do not attempt to enter unless you first determine the dog is friendly. If there is a dog sign in the yard or on a gate, do not attempt to enter until you have determined the dog is not outside. It is better to be safe than sorry. If there is any danger of a dog, tape the flyer to the gate, mark the house as inaccessible, and attempt to contact the voter by phone or mail.

- Do not place the flyer or letter in the mailbox or tape it to the mailbox. This is illegal!

Conduct a Phone Bank Canvass: If you cannot conduct an in-person canvass, whether because of the danger of COVID or a lack of volunteers to assist you, the next most effective means of reaching voters is through a phone bank canvass. The steps to plan a phone bank canvas are like those in a walking canvass, with the exception that you cannot provide a flyer/newsletter unless you get an email address or number to which to text it. **(See Appendix D for an in-depth discussion about different scripts for phone bank canvassing.)**

If you are unable to reach the voter on the first try, you might leave a message or call back again. Often it will take three tries to get a response.

Guidelines for Placing Phone Calls to Community Members

- As a rule, make phone calls between the hours of 9:00 am and 9:00 pm.
- Do not call before noon on Sunday.

Candidate Support: Some candidates are happy to have Democratic Party volunteers distribute their campaign literature as part of a canvas. In planning a canvas, you might want to contact candidate campaigns to see if you could carry their literature for distribution. It will be necessary for volunteers to have one piece of campaign literature for each door they will visit.

As a grassroots leader, you can offer to provide candidate yard signs to Democratic voters who would like them. If you deliver yard signs, please keep a list of those to whom you deliver signs, so that you can pick them up and return them to the candidate after the election.

Registered Democrats may volunteer directly for candidate campaigns in addition to conducting GOTV activities of the Democratic Party.

Monitor Voter Turnout during the Election
If somebody in your ward or precinct has permission to use the VoteBuilder system, it is often worthwhile to monitor requests for absentee ballots and early voting.

By doing this, one can fine-tune last minute GOTV efforts to those who have neither voted early nor requested an absentee ballot. For instance, one might send out an election newsletter/flyer by email four weeks before the election. One might then send a text message with a link to the election flyer/newsletter to those who have not yet voted or requested an absentee ballot approximately one week before Election Day.

Celebrate!
Last, but hardly least, celebrate your hard work and victories with a party at a local brewpub, restaurant, or grassroots leader's house.

Reference Tools

Appendix D contains a discussion of distinct types of canvasses and how to prepare or request walk lists.

Appendix I contains a discussion of various types of canvasses, as well as sample scripts, report formats, and instructions for canvassers.

Appendix L contains a two-year election timeline, which is useful in planning GOTV activities.

Appendix M contains information about voter registration and reinstatement of voting rights, as well as information about voting.

Appendix N contains downloadable sample GOTV letters, flyers, newsletters, and text messages.

9. Evaluating GOTV Performance

What Can I Learn in this Chapter?

- Analyze voting performance to evaluate your GOTV activities and adjust for future planning.

Analyzing Voting Performance

The DPBC hopes to develop a data analytics system to help grassroots leaders understand the demographics of voters and non-voters in their districts.

Until this system is in place, the VoteBuilder system is updated during elections to reflect absentee and early voting daily. The system is updated to reflect all who voted and the way they voted approximately six weeks after the election.

Those with access to VoteBuilder can sort voters by several variables, including manner of voting, voters/non-voters, gender, and age. **(See Appendix P for analysis options.)**

Ideally, there will be a direct relationship between grassroots activity and voter turnout. If this holds for some groups, but not for others, it may be necessary to consider other ways to reach certain populations that do not have a strong history of voting. Similarly, in a ward or precinct with limited volunteer resources, it may be most productive to discuss populations to target.

If your ward conducts a post-election analysis, the results should be used in developing a plan for the following year. Longitudinal analysis (looking at voting over time) is useful for long-term planning and measurement of growth at the grassroots level.

Reference Tools

Appendix O provides a sample of a post-election analysis of voter turnout by Precinct and type of election. This type of analysis can prove invaluable in formulating plans for upcoming canvasses and elections
.

10. Communication Tools

What Can I Learn in this Chapter?

- Create messages that are engaging and that get response
- Discover the basics of using social media
- Identify internal communications applications

Note: This chapter is intended as a quick reference or an overview of some of the precinct communication tools that are referenced in other sections of this manual. No doubt, there are volunteers in your precinct who have expertise in developing communications. Use these guidelines to help build a solid foundation for effective communication and increased involvement within your precinct.

The first part of this chapter explains the importance of messaging when conducting outreach activities. The rest of the chapter focuses on specific methods to communicate with voters and within your ward or precinct team.

Designing Effective Messages

Everything that is shared in outreach should revolve around a central message or messages. Designing that message is a critical part of the work we do. Here is a simple graphic that identifies the key elements that all messages should contain.

AIDA (Attract or Attention. Interest. Desire. Action) provides guidelines for effective communications. Whether developing a script, an email or a social media page, these elements will improve the effectiveness of your message.
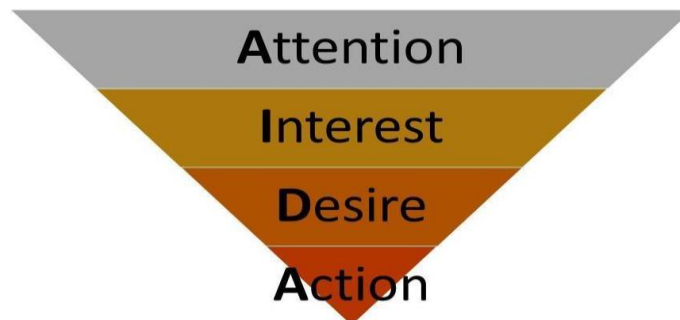

Figure 10.1. AIDA Model

- **Attract attention:** You must first get your constituent's attention to get them to read further, listen or not hang up! For print and web materials, consider this to be an eye catcher. Use a catchy phrase. For scripting, starting out with "hi, I'm your neighbor" can get someone's attention. Images get attention. Short videos get attention.

- **Maintain interest:** You got their attention, now give them more detail that is interesting. Include "What's in it for me?" (WIFM) statements. Briefly give essential information and leave out the boring details.

- **Create desire:** Now you persuade the person that they want to engage in your activity. Appeal to their emotions and feelings. Tell them the benefits of volunteering, or the benefits of voting or the benefits of attending your social event. You are not likely to see behavioral change or action if you skip appealing to their emotions.

- **Take action:** Once you build desire, you provide them with concise information on how to take action. This can include "Vote Early" with dates and polling locations. It could include "Attend our Event" with location information. Alternatively, call us….

In our modern day, we also recognize the R for Retention. People have the ability to "opt out" of email, skip over mail, hang up on you or slam the door. Are the above elements strong enough to attract your constituents? Is the message relevant? Is it age, gender, and ethnically sensitive? Review your messaging in advance with the intent to retain your listener.

Developing Literacy-Sensitive Materials

As mentioned in **Chapter 5,** it is critical to develop materials that are sensitive to low-literacy populations and easy to read for everyone.

<div style="border:1px solid">

Guidelines for Improving Readability

- Write short sentences and use words with fewer syllables.

- Use headlines using a bold sans-serif font, such as Ariel.

- For written material, use a serif font, such as Times New Roman. The serifs or little tails in the print help the reader follow the text. For electronic communications, most find a sans serif font easier to read.

- Do not bold the body of the text. Bold serif text is harder to read. Use bold only for highlighting.

- Avoid underlining text as it makes the verbiage harder to read. Use bold when needing to highlight something or put it in a text box.

- Never use italics. *Italics are harder to read.* Bold is a desirable alternative for highlighting text.

- Ensure there is a lot of white space on the page. Breaking paragraphs into bullets greatly

</div>

> improves white space and readability.
>
> ● Use illustrations or photos to capture interest.

Nationally, 10 percent of Americans are functionally illiterate. Recognize that this rate may be higher in your community. That means that over 10 percent of people who receive a flyer on their doorstep will not be able to read it. Infographic cards can be an alternative. For this reason, door knocking and talking to people is ideal.

> ### How to Determine the Reading Level of Print Material in MS Word
>
> ● Type up your document in Word. Then click on the File menu > Options > Proofing tab.
>
> ● Under the "When correcting spelling and grammar in Word" heading, check the box "Show readability statistics."
>
> ● In the Review tab, run a spelling and grammar check using the Editor icon.
>
> ● You will then be able to see readability scores based on two tests: The first is the Flesch Reading Ease test, and the second is the Flesch-Kincaid Grade Level score.
>
> ● The higher the score on the Reading Ease test, the easier the document is thought to be to read. Your document should be at least 60, or higher.
>
> ● The grade level is equivalent to the reading level of the material. It should be no higher than 8th grade, and 5th grade is ideal. That can be a challenge with 4-syllable words like Albuquerque.
>
> For other word processors, do a web search on how to determine the reading level with a particular software. There are also websites that allow you to place a sample of your text and to analyze the reading level. The software merely counts syllables and words within sentences to provide a standardized score of the reading level.

Scripts for Uniform Messaging

To ensure uniformity of message and maximum impact, the precinct leadership, with assistance from the ward chair, VAN, DPBC and/or other sources, should create scripts for block captains and volunteers to use in canvasing, block walking and get-out-the vote activities. **(See Appendix D for a discussion of existing scripts and Appendix I for sample scripts for distinct types of canvasses.)**

Telephone Calls

The effectiveness of leaflets, emails, and other postings can be enhanced by following up with a personal phone call. Phone calls are also effective for last-minute notification of events or deadlines and for canvassing voters.

Proper planning and discretion should be used to avoid voters receiving redundant or too frequent phone calls. The use of written scripts helps provide consistency of message and proper presentation of information.

Guidelines for Placing Phone Calls to Community Members

- As a rule, make all phone calls between the hours of 9:00 am and 9:00 pm.
- Do not call before noon on Sunday.

Texting

Texting follows similar rules as phone calling. Both either may use a centralized application or can be performed by individuals using their cellphones. Check with the group who is organizing this form of canvassing to learn which method they are using. When texting, it is important to keep the text message short while conveying the agreed-upon script.

Flyering

Delivering inexpensive flyers (leafleting) is an effective method of disseminating information to each Democrat and/or to persuadable voters.

All precinct leaflets and other delivered materials should follow the same format and style, to establish repeat recognition and help ensure maximum response. *Reminder: It is ILLEGAL to place anything on or in a mailbox.*

Social Media

There is a variety of social media available to communicate with your precinct residents, young and old.

How does social media work? Social media allows registered users to share information, while it promotes interaction, content sharing and collaboration. Communication on social media is a two-way street, allowing almost immediate reaction to a post.

Why do we need to use social media while communicating with our precinct residents? Pew Research provides some insight:

- Because many people in all adult age groups use social media today
- Because most users of social media visit their favorite site at least once a day.

This is important when you want to send out time-sensitive information as well as ongoing messaging. (**See Appendix P for a discussion of social media.**)

Commonly Used Social Media Platforms

- **Facebook** is by far the most popular free social networking website, among young and older adults, alike. It allows registered users to create profiles, upload photos and videos, and to

send messages. Posts stay posted until you take them down. Pew Research says 68% of US adults are Facebook users and that 75 percent of Facebook users visit the site daily.

- **Instagram** is used to post photos and short videos that can be captioned and altered. Posts can be public or private.

- **Twitter** is a free microblogging service where members can "tweet" short posts (140 characters max) and follow others' tweets. All tweets are public. Using a hashtag (#keyword) links tweets by topic. A user can search for and follow "conversations" about specific topics (such a specific candidate or issue) and/or join in the conversation.

- **Snapchat**, pictures and messages ("snaps") are only available for a short time to its 187 million daily active users. It only uses your phone contact list, unlike Facebook.

- **TikTok** is popular with young people. Information is shared through short videos, typically one to two minutes or less. This is a great site for targeting new voters.

Consider your age target groups when selecting social media platforms. Older adults tend to use Facebook and younger adults may tend to use Snapchat. Teens and young adults tend to use TikTok. These trends are changing. Ask a sample of your constituents what they are using!

Websites
Establishing and promoting ward or precinct websites provides contact and event information, as well as important links for local Democrats, and for independent and undecided voters who want to know more or become involved.

Internal Communication: Ward and Precinct Email and Chat Groups
Each ward or precinct should establish an email distribution system as one of the methods for communicating with leadership, volunteers, and voters. Setting up some type of electronic chat system offers added dimension to precinct communication. This is another case for finding computer-skilled volunteers in each precinct.

Email Distribution: This can be accomplished through a wide range of email marketing websites like MailChimp and Constant Contact. This allows you to send out nicely formatted emails and also get data on who opened them, who clicked on links, etc. The disadvantage of the free services such as Mail Chimp is that they take time to set up, they limit the number of contacts to 2,000 in a free account and the number of emails to 2,000 a month, and they may not be easily transferred with a change of leadership. In addition, there is no particularly easy way to determine whether somebody has previously been added to a group or to quickly remove a person from a group.

Email or Chat Groups: A common approach is to establish a Yahoo Group or Google Group. Members are invited to join and can set up preferences for how often they want to be notified of new messages. Designated members are allowed access to a website to view conversation "threads" between and amongst members. The group administrator can manage and control access to the Group and can designate other administrators to assist if needed.

It is important to be cautious about access to sensitive strategy or other proprietary information by opponents.

For more information about policies and limitations of Google Groups: *Google Groups Help*.

Critical Email Guidelines

The first time you send emails to your precinct; blind copy all recipients and provide them an opportunity to "opt out" on future emails. Systems like MailChimp and Constant Contact do this automatically and help you track how many people open their email.

Reference Tools

Appendix D provides information about accessing contact lists.

Appendix I provides sample scripts for distinct types of canvasses. These scripts are not programmed into the VoteBuilder system.

Appendix P provides an in-depth discussion of various means of electronic communication.

11. Building Capacity: Creating and Maintaining Local Databases

What Can I Learn in this Chapter?

- Consider what to include in ward or precinct records

- Explain why databases are preferred over paper records.

Importance of Good Records

It is very important for every ward or precinct to create, update, and maintain *its own records and database* about its voters, leaders and volunteers, as well as issues relevant to precinct residents. Whether kept manually or electronically, managing this information is *CRITICAL* to the success of building an effective precinct organization and to a *smooth transition with changes in precinct leadership and volunteers over time.*

Priority Data to Track

Precinct records should include information that is useful to you in organizing your precinct. Some precinct chairs build a list of people as they gather information that they want to keep track of, while some precinct chairs prefer to start with a list of all the Democratic voters in the precinct, as well as information about independent, undecided, and other voter categories. The precinct records should also include a section for *precinct leadership*, including contact information for the chair, team members, block captains, and other designated persons.

The listing for each voter should include:

- The usual basic contact information (name, address, home phone, cell phone), whether they text, email address and preferred method of electronic communication)
- Other information such as age, gender, major issue concerns at all levels of government, party registration, political group memberships, need for help with absentee ballots or getting to the polls, volunteer interests, and unique skills or resources.
- It is also helpful to add additional column(s) to make notes about phone calls, texts, etc.

Information for this database may be obtained from a variety of sources, including the VoteBuilder (VAN) system, precinct event and other event sign-in sheets, precinct canvassing, etc.

In return, precinct records and compiled voter information should be shared with DPBC or DPNM (subject to the exception that email addresses, obtained with the promise not to share with others) should not be shared.

Database or Paper Records?

Ward and precinct records may be created and maintained in a manual format; however, an electronic format (such as Excel) can be more easily shared with others and provides additional functionality such as sorting and reporting. **(See Appendix Q for an example of how to organize an Excel database.)** The DPNM can export VoteBuilder data into an Excel format, saving grassroots leaders' time in the creation of their own databases.

Finding a knowledgeable data manager with computer skills (and hopefully database experience) is helpful for getting the most out of your information. It is also a good idea to identify volunteers who are willing to do data entry. Having a pool of dedicated volunteers trained in your data idiosyncrasies and needs can result in having consistent, credible data.

A good rule of thumb is to *create your ward and precinct's records and database with your successor in mind.* The records should be useful and easily interpreted: they should "speak for themselves".

Reference Tools

Appendix Q contains a discussion of setting up an Excel database and the types of information that might be contained in it.

12. Succession Planning

What Can I Learn in this Chapter?

- How to prepare for my successor so things continue to run smoothly!

Records Maintenance

A successful ward or precinct chair will develop and maintain records (preferably electronic) of materials developed to do their job. These often include listservs for communication with members, a ward or precinct database, such as Excel, containing information about local Democratic voters. **(See Appendix Q for a discussion of what one might include in an excel database.)**

Leadership Development

An effective grassroots leader will always be on the lookout for individuals who might be willing and able to become grassroots leaders. Even if a precinct or ward chair has no wish to step down immediately, he/she/they may begin to groom somebody for a leadership role by asking that person to take on specific tasks or act as a vice chair as a way of grooming them for leadership.

Leadership Transition

When a grassroots leader steps down, they should transfer records to their successor (if there is one) or to the DPBC. It is only through creation and transfer of documentation that accumulated knowledge may be retained and expanded. **(See Appendix R for a discussion of succession planning.)**

Plan for New Leaders

- One should always be on the lookout for people with the interest, ability, and time to take over his/her/their job.

- If you do not wish to run for another term, begin to identify and train a successor during your second year in office.

- Ensure that your successor knows what the job entails and has training to perform it.

- Hand over materials immediately after your successor's election.

Reference Tools

Appendix Q suggests what types of data one might include in an Excel database.

Appendix R provides a checklist for succession planning.

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Glossary

CCC	County Central Committee – Governing body of the Democratic Party of Bernalillo County, composed of ward chairs, precinct chairs and some elected precinct members.
DNC	Democratic National Committee – the governing body of the Democratic Party of the United States
DPBC	Democratic Party of Bernalillo County
DPNM	Democratic Party of New Mexico
EMD	East Mountain Democrats
GOTV	Get Out the Vote
MiniVAN	A mobile app designed to allow canvassing with VoteBuilder walk lists using a phone or tablet rather than paper lists. Allows for immediate syncing of canvass data.
NDTC	National Democratic Training Committee
Political Party Names	Democratic (D), Republican (R), Independent (I), Libertarian (L), Decline to State (DTS)
SCC	State Central Committee – governing body of the Democratic Party of New Mexico

VAN	Voter Activation Network – A national database of voter information to which DPNM and DPBC have access through VoteBuilder.
VoteBuilder	Software that allows access to VAN's database of voter information. VoteBuilder can create lists of voter information and specific walk lists based on many different criteria.
WSD	West Side Democrats

APPENDICES

Appendix A - [Democratic Party Training Materials](#)

Appendix B - [Democratic Party Roles](#)

Appendix C - [Ward and Precinct Information for Bernalillo County](#)

Appendix D - [The Democratic Party Database](#)

Appendix E - [Obtaining Lists of Potential Volunteers](#)

Appendix F - [Annual Plan](#)

Appendix G - [Planning to Advance Development of Wards and Precincts](#)

Appendix H - [Event Planning Sample Docs](#)

Appendix I - [The Role of Canvassing](#)

Appendix J - [Meeting Event Planning Tools](#)

Appendix K - [Share Your Skills Form](#)

Appendix L - [DPNM Calendar and Two Year Planning Calendar For Ward and Precinct Chairs](#)

Appendix M - [Registering to Vote and Voting in Bernalillo County](#)

Appendix N - [Election Flyers - Newsletters - Texts](#)

Appendix O - [Analysis of Election Results](#)

Appendix P - [Electronic Communications](#)

Appendix Q - [Grassroots Record Keeping in Excel](#)

Appendix R - [Succession Planning Checklist](#)

Appendices are in DPBC Google Drive folders so sample documents may be downloaded and modified.

PC users: You may need to press Control-Right Click to activate the links to the Appendices depending on the version of your browser.