
The Art of Campaign Scheduling

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Campaign scheduling is one of the most critical and challenging jobs in politics. After the candidate and the campaign manager, the scheduler should have greater responsibilities and more awareness of what's happening than anyone else in the campaign. It is his job to hold the campaign together by serving as a communications link to individuals and groups in the candidate's constituency and between the divisions of the organization. A good scheduler will recognize that the candidate's time is a campaign's most important resource, and will follow a scheduling strategy that eliminates wasted motion. Here's a road map to that straight and level campaign trail.

All successful candidates must allocate time to raise money, appear before community interest groups and meet both the general public and individual voters. How to combine these activities in a rational manner is the job of the scheduler. And many factors affect the juggling that is necessary to put together a daily schedule which moves the campaign toward its objectives. Some of the variables are:

- whether the candidate is campaigning full or part-time
- the size and makeup of the district
- the energy level of the candidate
- his or her family obligations
- whether the race is a primary or a general election

If you are starting from scratch, don't panic! Scheduling begins slowly, but it becomes easier as you reach out into the community. One contact leads to another, that one to two others and so on.

First, lists should be secured which include the names and addresses of party leaders, elected officials, representatives of community organizations, clergy and other VIPs. The candidate should be present in the early stages of research to provide his input on the people you have identified and additional contacts. Key members of the candidate's

campaign staff—the campaign manager, media and public relations consultant, treasurer, fundraiser, volunteer coordinator and research coordinator—should be consulted also. Once you have a good base of contacts and know how to reach them, you're well on the way. But there are a number of campaign scheduling rules that should never be broken and some tips that can make the first-time scheduler's life much easier.

Organization and details win

(The politics of a campaign can be learned, but if the scheduler is not organized and attentive to details, the campaign can collapse.) Get a file box, or preferably a computer, to keep names, phone numbers and other pertinent information at your fingertips; most of the campaign software packages on the market today have a scheduling function to maintain critical information. It's a valuable feature. Any contact, any name that is mentioned, should become a card or a computer file entry. Here are some rules to follow in building your core scheduling file of contacts and events.

- ALWAYS ADD A PHONE NUMBER TO A CONTACT'S NAME.

There are always snags in a schedule—people don't show, events get altered and other last-minute changes take place—which require someone to get in touch with a contact. Nothing in a campaign is accomplished in a leisurely manner; everything is almost always an emergency and having contacts and phone numbers in place will save hours of aggravation.

When entering data into a computer, attention

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to phone numbers and other contact-specific information can save a great deal of time during the course of a campaign. The scheduler should develop a series of codes (for escorts, organization contacts, VIPs, etc.) which can be used to identify each person in the scheduler's file and which should be entered at the same time as other critical data.

A regular print-out of all volunteers that a campaign enlists can be mined for new contacts to input and tag as well. The scheduler should make every effort to facilitate the communication of such information between different divisions of a campaign organization.

• ALL MESSAGES, SCRAPS OF PAPER AND OTHER INFORMATION ABOUT EVENTS MUST BE FORWARDED TO THE SCHEDULER.

The candidate must be cautioned not to be his own scheduler. All invitations must automatically get passed on to the scheduler. Invariably, the candidate will meet friendly supporters who will offer event and contact information. As the campaign progresses, there is too much information for a candidate to retain or follow up on. Missing an important event because the candidate or a key staff person forgot to tell the scheduler is a serious lapse in organization. Be militant with the candidate and the staff about reporting events and contacts to you.

Track all scheduling information in a loose-leaf notebook or a monthly file with daily tabs. Whether you use a computer or not, you need a

hard copy of all requests for appearances by the candidate for daily schedule plans. Simple questions can be answered more efficiently by referring to a hard copy of the schedule than by accessing a computer program. And, it often happens that when you want access to the computer, someone else is inputting. Finally, computer breakdown will not result in campaign breakdown when you have a hard copy of critical scheduling information.

Develop a form to take down scheduling information. Figure 1 below is a sample of such a form. Most campaign-oriented scheduling software incorporates the same basic data in on-screen formats and in printouts. Even if you use a computer, you need a form like the sample by the phone and in your scheduling file. Try to get as much of the required information the first time a contact is made.

You must also subscribe to all of the local papers right from the start. This is a worthwhile investment to generate a full range of scheduling options. As soon as possible, the campaign or the scheduler should find volunteers to clip the papers. However, it is the scheduler who should do the actual scanning of the local "rag" and circle the events to be clipped. Do not leave the job of clipping to first-time volunteers who do not know what to look for. The clippings should be pasted onto the daily sheet so that the scheduler can enter events on a master sheet or into the computer file.

Another way to learn about events and develop

Figure 1
A Sample Scheduling Form

DATE OF EVENT: _____	Today's date: _____
EVENT: _____	ARRIVE: _____
_____	LEAVE: _____
LOCATION: _____	
CONTACT: _____	TELEPHONE NO. _____
PRESENTATION: _____	
HOW LONG, TYPE: _____	TELEPHONE NO. _____
ESCORT: _____	TELEPHONE NO. _____
DRIVER: _____	TELEPHONE NO. _____
SUPPLIES: _____	
CONTACT AT EVENT: _____	TELEPHONE NO. _____

DIRECTIONS: _____	

PRESS RELEASE: _____	
NOTES: _____	

FOLLOW-UP: _____	

contacts is to establish relationships with friendly schedulers for other campaigns and with staff for incumbent officeholders. There should be five or six people with whom the scheduler maintains regular communication—that means a call at least once a week. Where the county or regional party operation is alive and well, one of those calls should be to the party office. This is an excellent way to coordinate appearances by your candidate with popular candidates for other offices.

• **YOU MUST ALWAYS PREPARE A FILE COPY OF ALL CAMPAIGN SCHEDULES AND OTHER SCHEDULE-RELATED MEMOS.**

Communication is the vital ingredient of all successful campaign operations and the scheduler must make particular efforts to be prepared for the all-too-common occurrence of schedules getting lost and misplaced in the myriads of paper a campaign generates. But this is not the only reason for keeping detailed file copies. Once the contacts have been made, they can be utilized by the candidate once in office or in future races; the scheduling agendas can be the basis for his activities as well in the years after the campaign.

The candidate, the candidate's family, the campaign office and the campaign manager should all have copies of the schedule. The escort or driver should have a copy too in another color or in a special folder; this will eliminate the burst of panic when the candidate is on the road and cannot locate the instructions for the next event.

Prepare the schedules on a daily and weekly basis, allowing for some flexibility and input from the candidate and the campaign manager. Ideally, the daily schedule should be ready the night before. At some point in the campaign, the candidate will have to delegate all of the decisions about his waking hours to the scheduler. To assuage the candidate's fears that the best possible schedule has been prepared, set aside space on the bottom of the daily calendar for FYI (For Your Information) notes. Include other events taking place and who is covering them for the campaign. It sometimes happens (only to the other candidates, of course) that it rains and events are cancelled. The FYI notes provide last-minute options to the candidate. (This brings up another scheduling nightmare, not adequately covered in most software programs on the market, how to incorporate the alternate or the "rain-date" schedule.)

The scheduler should have worked out with the campaign manager several alternate plans for rain and other major calamities that leave unforeseen hours for candidate activities. These hours might

be utilized for such efforts as door-to-door work in apartment houses, or fundraising and VIP phone calls.

Remember: confirm events whenever possible, especially if the candidate is going to speak. Follow-up is critical, but the scheduler shouldn't have to call four times on a particular event. If the candidate misses an event, arrives outrageously late (everyone accepts slightly late) or cancels at the last minute, it creates a negative impression about the campaign—that it is not organized or "doesn't care about us." The outside perceptions of the campaign are a vital aspect of winning. And the competence of the scheduler plays an important role in creating the right impression. Only he or she should make scheduling arrangements. There is truth to the old adage "too many cooks spoil the brew." Too many schedulers tarnish the campaign image as events and "commitments" get tangled.

Once events have transpired, the daily schedule should be reviewed by the campaign manager, the candidate and the scheduler to work out problems, assess needs and capitalize on what is effective. In this regard, the scheduler should serve as an escort for the candidate several times during the course of the campaign to get a sense of what's happening in the field and whether or not the flow of information on events and contacts is working as smoothly as possible.

Ideal qualities: persistence, tolerance, unflappability

Getting escorts for events and arranging for contacts at functions are major scheduling chores, even if a candidate has a full-time driver. Determining who are the best contacts, where to meet them and at what time, often requires many phone calls.

If a candidate is going door-to-door, it is good politics and advisable to inform the local district or precinct leader of the candidate's presence in the neighborhood; it may be important and effective to have the district captain or another local figure join the candidate. He or she should not go to an event unaccompanied. Where possible, escorts should reflect the type of event the candidate is attending. For example, at an ethnic affair, it is only smart politics to have someone from the event introduce and escort the candidate around. When attending a luncheon sponsored by a woman's group, it is foolish for a male candidate to be escorted only by male assistants. The candidate's escorts

A Winning Campaign Schedule For a Local Candidate (Running Full-Time For a November General Election)

Spring

8:00-10:00 A.M.: The candidate should read all area newspapers, research issues and collect all information relevant to building his core campaign staff and formulating his overall effort.

10:00-12:00 P.M.: This is a good time for making telephone calls. Once the campaign pace picks up there will never be enough time for the candidate to contact all of the people who can aid his candidacy. Calls should be directed to recruiting volunteers, winning the support of party and community leaders and other VIPs, and raising money from large donors.

12:00-2:00 P.M.: Attend lunch meetings. Lunchtime provides the perfect opportunity for a candidate to meet with interest groups representing all the local, organized centers of power, i.e., tenants associations, the Chamber of Commerce and other business organizations, union leaders, the Rotary Club, etc. The candidate should also set up lunch meetings with "money" people, volunteers, party people, representatives from the media and other important contacts.

2:00-5:00 P.M.: Afternoons should contain one or two appointments with interest groups and/or their leadership. This is often a good time for a candidate to drop in (but make an appointment first) on all local media outlets, i.e., the offices of newspapers and cable, radio and TV stations. Time should also be devoted for correspondence to telephoning.

8:00-10:00 P.M.: Informal coffees, cocktail parties and other fundraising and voter outreach events should be regularly scheduled. Attend *all* local party committee meetings. Many organizations have yearly dinners in the spring and as many as possible should be attended.

Time also should be set aside for attending Council and other political meetings where community issues are discussed (and where the holders of the office you are running for sit). This is, of course, particularly necessary if the candidate is an incumbent. A challenger running for a state legislative office should plan a two or three day trip to the state legislature as part of his early schedule when the state capital is a fair distance from the district.

Summer

6:00-9:00 A.M.: In May and June, before the closing of schools, this time two or three days a week should be spent at points where parents drop off their children, and at train, subway and bus stops in general. This is a good way for the candidate to begin to introduce himself to the public at large.

10:00-5:00 P.M.: The activities for this time period in

the spring schedule should be continued in the summer months. However, visits to beaches, pools, outside fairs, supermarkets and other places where large numbers of people congregate should be added to the calendar.

5:00-8:00 P.M.: An aggressive campaign should begin door-to-door candidate canvassing by the end of May or early June. (From 5:30 to 8:00 in the evening and all day on Saturday are the best times to catch people at home.) Canvassing should be highly targeted to get the maximum efficiency from the candidate's time according to district demographics, its size, the physical condition of the candidate, types of housing and the lay of the land (a suburban or rural area may be difficult to walk and provide few voter contacts).

Summertime Weekends: Summertime means a surge in outdoor activities—public fairs, festivals, concerts, swimming pools, shows—providing myriad opportunities for candidate visits and campaigning.

Sunday P.M.: Sunday evening is a good time for telephone work.

Fall

6:00-9:00 A.M.: The campaign intensifies after Labor Day as the public really begins to focus on the candidates and elections. The full complement of train, subway and other major transportation stops should be scheduled for candidate visits; schedule the most popular stations closest to Election Day and go backwards from then in scheduling the other stops.

10:00-12:00 P.M.: There should be fewer fundraising calls in the fall since this function should largely have been taken over by the finance chairperson. Still, time should be devoted to contacting potential large donors, and there are other phone calls, appointments and memos for the morning. This is also a good time for press conferences.

12:00-2:00 P.M.: The candidate should be the keynote speaker at luncheons, i.e., women's clubs, garden clubs, Chamber of Commerce, etc. Media, clergy, interest groups should be visited or revisited. (Lunchtime is often the best time to visit senior citizen centers and nursing homes.)

3:00-5:00 P.M.: Interviews on talk shows, for radio and with newspaper reporters. Speaking at social studies classes early in the fall can reap good high-school volunteers.

5:30-8:00 P.M.: Door-to-door canvassing becomes even more focused and targeted. In a rural area, telephoning may be substituted for door-to-door activities.

8:00-10:00 P.M.: Every evening should be blocked in with coffees, fundraisers and meetings. There may be some debates. Time should be set aside for telephone calls that cannot be made during the day.

should blend into the crowd, wherever possible. They can be more effective when not drawing unnecessary attention away from the candidate.

Making arrangements for escorts and events often takes as long as the few hours spent in a particular neighborhood or at a community function. Last-minute cancellations and changes are daily occurrences and cannot frustrate or cause the scheduler to lose his or her cool. One scheduler I worked with took each event so personally that after having spent her time to set up and confirm a particular function, she took personal umbrage at having to cancel. She felt that her word and reputation were on the line when she promised that the candidate would show. Every effort should be made to keep to a schedule, but in the hurly-burly of a campaign no plan is inviolate. To guard against potential negative fallout from missing an event, the scheduler should maintain a list of last-minute campaign stand-ins, whether they are relatives or active campaign workers.

It is crucial that the scheduler always be on the lookout for "visibility" opportunities for the candidate. At the local level, candidates have a finite number of people and events and often have more time to get out and "press the flesh." Events providing local candidate exposure might include: a mid-day fashion show in a local department store or high school football games. Bowling alleys, movie lines, outside bazaars and fairs are good places to meet voters. But the scheduler must be particularly attentive to events the press might cover.

Pitfalls to avoid

People in general, and politicians in particular, like to gossip. But politicians hold grudges and have long memories; the scheduler is a friendly ear and it may be important to listen, but definitely not to participate. Never tell stories or pass on gossip or you risk undermining a positive atmosphere for the campaign and positive image for the candidate.

The scheduler is a key voice and ear to the outside world. She is always asking people for favors—whether it is to walk with the candidate, meet him at 6 A.M. at a train station or squeeze him into a program as soon as he walks into a crowded ballroom. A cheerful voice goes a long way. Conversely, when people are vying for the candidate's time, a friendly "no" may still be a "no," but it is couched in a different hue. I have known schedulers who were so protective of their candidates that they actually built a wall around them, and the perception of inaccessibility, abruptness and

coldness of the scheduler, rubbed off onto the candidate.

The scheduler also may find himself in the middle of family tiffs. Even with the most supportive spouse, there are always disagreements. Politics is a seven-day-a-week, 24-hour-a-day obsession, but don't lose sight of the fact that a candidate has a personal life.

Parameters for dealing with family members should be set up early in the campaign. Careful thought must be given to how much time needs to be spent at home and when. It is important to provide the spouse with a schedule, too, so that when his or her presence is required, he or she has sufficient notice and has planned for it. Regular communication is important so that the spouse feels as much a part of campaign as possible, and schedulers should recognize that they are a critical link between the campaign organization and the candidate's family.

Very often the spouse will be an active part of the campaign and have a schedule of his or her own. This should be prepared by another individual under the supervision of the chief scheduler. The failure to inform a spouse about campaign schedules can quickly lead to a situation in which the spouse is not supportive, or worse, demonstrates downright hostility toward everyone in the campaign and engages regularly in verbal battles with the candidate and staff.

Commitment and teamwork

In addition to preparing candidate family members' schedules, there are a host of other scheduling-related jobs that need to be filled in a campaign. These include that of newspaper clipper (previously discussed), and a full-time assistant who is fully apprised of each step in the scheduling process to help make contact calls and to take over when the scheduler is not available.

A targeting scheduler is another full-time position, when the candidate intends to do a lot of door-to-door campaigning. The regular scheduler does not have the time to prepare the candidate's walking schedule and should only note time, place and escort in the daily schedule log. In addition to mapping out the district, determining logical walking routes, finding escorts and selecting the areas and types of people to be visited (all homes, all Democrats, etc.), the targeting scheduler has to provide accurate directions and special memoranda on who is being visited and why. If the determination is made that it is important to visit senior

citizen centers, for example, gathering the lists, prioritizing the importance of each center and providing contacts and telephone numbers of contacts should be the targeting scheduler's job. Only when all of this information has been collected should the scheduler enter the picture and make the final arrangements.

Another position in the scheduling department is that of a weekend team scheduler. Once the campaign is in gear (in the summer and the fall), there will be or should be other teams of volunteers distributing literature, attending events as surrogates and advancing the candidate. For a local-level race many of these activities take place on weekends when volunteers are available. The weekend calendar must be coordinated with the scheduler, but its preparation, implementation and the collection of names of volunteers should be another person's responsibilities.

It is important that one person have overall responsibility for the scheduling team's functions. Scheduling is an ongoing learning process and continuity is an essential ingredient. There can be considerable turnover in campaigns, but it should be apparent from this article that no one should accept the position of head scheduler unless they are

fully committed to a candidate or his goals, and to seeing a campaign through to its conclusion.

You can't be a scheduler if you can devote only a few hours a week on the same day each week. Events are always changing. The unexpected happens. Candidate and staff have to know who to call to get results. The scheduler must be on call so anyone within the campaign can advise him of new opportunities for the candidate or of any breakdown in scheduling plans. A full-time commitment enhances communication within a campaign and fosters an awareness of what's taking place in a community, while lapses in scheduling organization and follow-through can be disastrous for the campaign effort.

But accepting general scheduling responsibilities, brings rewards. The scheduler is always in the know about every event and the candidate's activities. The candidate comes to rely on the scheduler as his right hand throughout the campaign, and will unquestionably notice a smooth operation running on schedule without last-minute hitches. If the candidate is elected, the scheduler is clearly in line for an important administrative post. Because committed and organized schedulers are worth their weight in gold. ★