

A Guide to Recruiting and Managing Campaign Volunteers

Catherine Webb and Joseph Mockus

Corralling volunteers is only the first step in loosing an effective slave labor force on the electorate. Kate Webb and Joe Mockus emphasize the importance of structure and planning in the process of marshalling volunteer work for the campaign. The article explores methods of recruiting and coordinating a willing, happy, and productive group.

A volunteer is a creature who tends to come late and longs to leave early, who telephones

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to say, "I'm on my way," then never shows up.) Ask a volunteer to take a vital mailing to the post office, but don't be surprised to learn, a few days later, that the mailing is still in the trunk of his car. Place a group of volunteers in the same room to work, and each will be convinced that the others have been given sharper pencils, more comfortable chairs, and better light.

(Volunteers are a pain in the neck. But, like getting out of bed in the morning, they are an essential pain in the neck.) First of all, despite their deficiencies, they do some work and they do it for free. Effective use of volunteers can reduce a campaign's payroll by 20 percent. In a statewide race this can

mean substantial dollar savings. Equally important is the fact that the presence of volunteers gives a campaign visibility and the appearance of momentum. (Volunteers suggest to voters that the candidate is worthy of commitment.)

... the top of the recruitment pyramid must demand progress reports from those beneath them in the structure. Those on the lower levels must know their performance is being monitored.

* (Volunteers, in other words, not only help deliver messages to voters—by licking envelopes, writing notes or telephoning friends—they are messages in themselves.)—

Volunteers—are they out there to be found?

Novice candidates consider volunteers their due and are always optimistic about collecting their due at the outset of a campaign. Aunts, uncles, and godparents galore stand eagerly ready to roll up their sleeves. And, of course, somewhere in the drawer of a desk there is a file with the names of hundreds of people who have offered, unasked, to help in the campaign. (This is invariably the file that is never found; on the day before the election the candidate is still looking for it.)

The candidate's optimism is soon replaced by despair. Once he envisioned an army of volunteers streaming in the doors of his campaign headquarters. Now he sees only a void.

But, according to a recent nationwide poll sponsored by D.C.-based Targeting Systems, Inc. and conducted by W. R. Hamilton and staff, also of Washington, D.C., the volunteers are out there. Eleven percent of respondents in the May 1980 poll claimed to have served as a volunteer in a political campaign within the previous two years. The high response was neither a regional nor party phenomenon. Most volunteers, however, cluster in the 35-49 age bracket and are somewhat wealthier than the average citizen. The poll suggests that professors and students can be considered volunteer "types." Blue collar workers seem to be the third most likely source of campaign workers. The potential volunteers are there. (Asking people to serve is the key to volunteer recruitment.)

Targeting recruitment efforts

Targeting is the discipline that, through the study of past election results, polling data, demographics, and related information, helps a campaign determine which voters are worthy of attention, and which are best ignored. The most likely volunteer prospects can also be targeted. The easiest targets are:

—Individuals with a personal stake in the candidate. This group includes the candidate's friends, family, associates, acquaintances—and their friends' family, associates, acquaintances.

—Groups which identify with the candidate's positions on issues. Organized single-issue groups are sources of potential volunteers.

—If the candidate has run before, past volunteers can be re-recruited.

—The candidate's political party.

—Labor unions.

—Students, especially political science majors.

—People who have contributed small amounts of money to the campaign.

—Anyone who can be perceived in any possible way as "owing" the candidate something.

The volunteer coordinator

(In any volunteer recruitment effort, the first person who must be added to the campaign team is the volunteer coordinator.) The coordinator recruits volunteers, prepares their projects, and supervises their work. It is generally a salaried post—and it should be. It is a demanding job.

The coordinator must set up the work so that volunteers can fulfill their commitment with as little hassle as possible. A space for each worker must be prepared, each with its ballpoint pens, consignment of envelopes and stamps, list of names and addresses for mailings, and other essential materials. (If this sounds a bit like a kindergarten teacher getting ready for class, the analogy is not entirely inappropriate.)

Since most groups of volunteers contain a healthy percentage of conspicuous eccentrics, there will often be minor quarrels to settle. This must be done with the tact of a Dinah Shore. Yet there are times when even Dinah Shore must be stern. The

point, after all, is to get the work done. The volunteer coordinator does have the option of easing a volunteer out of the effort—graciously and firmly. (Successfully coordinating volunteers requires the ability to organize and motivate, attention to detail, respect for deadlines, an agreeable personality, and a knack for making the most routine activities enjoyable.)

Every employment application for a volunteer coordinator should include the question, "Have you ever been a martyr?" Martyrs do not succeed at the task. Martyr volunteer coordinators attempt to do all the work themselves—work that volunteers should be doing. Martyrs begin to sink about a month after they join the campaign. Soon they arrive at headquarters in the morning with uncontrolled twitching. Two months before the election they have nervous breakdowns, leave the campaign, and are thereafter spoken of in hushed voices. Because a volunteer coordinator must be available to the campaign at all hours of the day and week, this is often also the fate of nonmartyrs.

Allow the recruiter to adapt the system to his own personality—and the personalities of those he plans to contact.

A volunteer coordinator must be perceptive about people—and like them. One important duty is to unearth and assess the talents of volunteers. Most volunteers are destined for responsibilities no more taxing than mailings. But volunteers often include sign painters, researchers, writers, photographers, and persuasive speakers. Gems do exist. It just takes a lot of looking to find them.

Recruitment methods

In most campaigns, the need for volunteer help is so pressing that a number of methods should be used simultaneously. Direct recruitment is the simplest. With this method, the first essential is a list of people to recruit. Such a list should be drawn from the sources discussed earlier under the heading "Targeting Recruitment Efforts." (It should include the name, address and telephone number of every prospect to be contacted.) The other basic ingredients of a direct recruitment effort are a system—including instructions, tallies, recruitment cards, reports—and a "pitch," a telephone, and a telephoner. At its most elaborate, direct recruit-

ment takes the form of a paid telephone bank working either under the direction of a paid supervisor or out of campaign headquarters. At its simplest, direct recruitment can be accomplished by unalienated members of the candidate's family calling from home or from an office that has donated the use of its telephones.

Are there large numbers of refusals? Yes. Do myriad individuals profess ignorance or indifference? Invariably. Will the process yield volunteers? Without fail.

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The telephone call in the direct recruitment process is more than an aid to recruiting volunteers. It is also a "hit." A call drives the candidate's name a little deeper into the consciousness of the person contacted.

Organizational recruitment relies on a pyramid structure to make an unwieldy job manageable. Suppose that a campaign needs 500 volunteers for a specific purpose. To corral that number, the volunteer coordinator needs help. He gets it through the following process:

1. He recruits ten "deputies."
2. Each deputy enlists from among his own friends, relatives, and acquaintances ten recruiters, for a total of 100 recruiters.
3. Similarly, each recruiter brings in ten volunteers.

This gives the campaign 1,000 volunteers when only 500 are needed—in the spirit of the most important of the Mockus/Webb rules of recruitment: always aim for twice as many as the number required, for only half are likely to put in personal appearances.

Examples of other recruiting methods include—

—The president of a local union is given 100 volunteer recruitment cards and asked to recruit campaign workers from union ranks.

—Recruitment tables are set up whenever the candidate makes a major appearance, or when volunteers are passing out campaign literature at a shopping center.

—The coordinator contacts local activists and says, "You are a good friend of a lot of people who are doers. How about signing 25 of them up for the campaign?"

In the end, the most necessary element is the ability to recognize and seize quickly a recruiting opportunity when it arises.

The three rules of recruitment

What we have discussed up to now is nothing less than a blueprint for disaster and chaos. Imagine it. The candidate's Aunt Millie says she has lined up 52 volunteers. Of course she's written down their names, addresses, and telephone numbers on a list—do you take her for a fool? Unfortunately the list is in her other purse, which she left at her daughter-in-law's last Friday. But there's nothing to worry about. She'll collect the purse sometime next weekend. Uncle Morris has promised to talk with 25 volunteer prospects and will begin doing so as soon as he figures out what to say. The pyramid structure has spawned hundreds of recruiters, and, as far as we know, they're out there recruiting. Has anyone heard from them lately? We have set up a formidable recruiting machine but, no matter how impressively it rumbles and roars, there is the danger it will produce nothing.

There is a way of imposing order on the process of recruiting, as well as that of voter contact. The key to productivity has three elements:

1. Strict Accountability
2. Rigid Systemization
3. Creative Informality

Strict accountability

(Everyone involved in a volunteer recruitment effort must be given goals and deadlines.) It is not enough to say to a person, "Your job is to recruit a couple dozen volunteers in the next few weeks. I'm depending on you. Call me when you've got your volunteers." Instead, the message should be: "Your goal is 20 volunteers. You must recruit them by Sunday, August 24. That gives you ten days. In the meantime, I will be telephoning you every other day to check on your progress."

The second message imparts a sense of urgency. Its promise must be kept; the top of the recruitment pyramid *must* demand progress reports from those

beneath them in the structure. Those on the lower levels must know their performance is being monitored.

Ten Rules for Recruiting and Keeping Campaign Volunteers

1. To get a volunteer you must ASK someone for help.
2. Always ask volunteers to do a specific task.
3. If you want to get a job done, recruit two volunteers for every one you need.
4. You've got to view every person as a potential volunteer and every volunteer as a potential recruiter of other volunteers.
5. Always call volunteers before they are due to show up. RECONFIRM their commitment.
6. Always be prepared for volunteers. NEVER, NEVER waste their time.
7. Volunteer work has got to be FUN.
8. Recognize volunteers.
9. Re-recruit volunteers after they've completed their assignment.
10. Remember, recruitment never ends.

Rigid systemization

People do not generally take on volunteer responsibilities frivolously. When they promise to recruit volunteers and contact voters, they have every intention of keeping that promise. But often something happens. They become shy. They don't know what to say. They feel "funny" about contacting others—awkward and inadequate. And so they put the job off. They become evasive when reports are demanded: "I call and call, and nobody's ever home."

Rigid systemization is a way out of this dilemma. (Everyone involved in a volunteer recruitment effort must be given step-by-step written instructions.) Suppose your assignment is to recruit ten volunteers. With rigid systemization, you would be given a kit with the following materials:

—The step-by-step instructions just mentioned.

The instructions should leave nothing to chance, and should anticipate potential problems. There is a deadline for each step. For example: Step 1—Compile a list of prospects to contact. You are expected to recruit ten volunteers. For that you will need a list of 40 prospects. Consult sources such as your Christmas card list and the membership lists of organizations to which you belong. Include friends, relatives, business associates, neighbors. Begin compiling the list on Tuesday, August 26. You will be telephoned on Thursday, August 28 for a report.

—Forms for recording the results of contacts.

—Report cards, used to report progress to campaign headquarters.

—Background information on the candidate and his stands on the issues. Such information aids the recruiter in answering questions and selling the candidate.

—A script to guide the recruiter when approaching prospects.

—A name and telephone number where questions can be answered at any time.

True, the job of volunteer recruitment is not especially complex. But to the uninitiated it can seem intimidating. With rigid systemization, the recruiter is never in the dark and never at a loss. He feels competent because the instructions demonstrate how really simple his assignment is.

Creative informality

This is the element that keeps the process from becoming oppressively totalitarian. Some find comfort in preplanned rigidity, but others may bridle and say, "I don't want to telephone all the people on my list. I want to get them over to my house on a Saturday night, get a couple of drinks in them, then ask them eyeball to eyeball to volunteer for the campaign." (Stifle such an individual approach and you risk stifling the recruiter's enthusiasm.) Allow the recruiter to adapt the system to his own personality—and the personalities of those he plans to contact

How to use volunteers

What should a volunteer be asked to do for a campaign? The most fundamental answer is: some-

thing. A volunteer who spends an evening at campaign headquarters wandering about with empty hands and vacant eyes is unlikely to return. A volunteer who is not given something to do feels abused. He thinks, "They tell me it's so important that I come down to headquarters, and then they haven't got any kind of job for me. I've got better things to do." There is always plenty to do in a campaign. (Idle volunteers are invariably a sign of disorganization in the upper levels of the campaign.)

The most important use of volunteers is in voter contact programs. Volunteers

—address, stamp, and stuff the envelopes that carry the candidate's message to voters

—telephone or write short notes to friends and other voters

—host small parties or coffees at which the candidate can meet the volunteer's friends and neighbors

—build audiences for candidate appearances by inviting 25 friends to attend such functions

—knock on doors to distribute literature

—recruit other volunteers

A good word for volunteers

The beginning of this article painted a grim picture of the role of volunteers in a campaign. And so it is only appropriate to close with a few encouraging words.

Volunteers are sure votes. If a volunteer has worked for you, he's sure to vote for you.

Volunteers influence their friends to vote for the candidate. Many people go to the polls with no strong feeling about the majority of races. Voters often cast their ballots one way or another for reasons more whimsical than substantial: "This is the guy George worked for. I might as well vote for him."

They do important work—for free. And they bring a rare enthusiasm and vitality to a campaign. So, once a campaign has volunteers on board it pays to treat them well, to give them safe, clean, adequately appointed places in which to work, to provide them with free coffee and a snack once in a while, to thank them repeatedly both by mail and in person. (They may drive "seasoned professionals" up the wall, but they are one of the elements that can make the difference between a winning and losing campaign.) ★