



Campaign Team: Roles & Management



Status

In progress


Team Management Resources

- [Contract Template for Local Campaigns](#) - Use this template for each person you hire for your campaign. Make a copy of the linked doc and fill in the highlighted sections.
 - **NOTE:** the Campaign Manager's contract will be with the BC Green Party. All other local campaign staff contracts will be with the local campaign.
- [Schedule A: Local Campaign Manager Services, Tier 1 Campaigns](#)
 - You can use the role descriptions below as a starting point for the "Schedule A: Description of Services" for all roles other than your campaign Manager.
- [Volunteer Agreement and Waiver](#) - all staff, candidates, team members and volunteers must fill this out.

- Privacy Training - All team members or volunteers who handle any data or personal information must complete this.
 - Video coming
- ORGANIZING: People, Power, Change (Snowflake Model) - Theory of building out effective teams

Campaign Role Descriptions

Each campaign's roles will differ depending on their capacity. Some campaigns have larger teams that can have different people doing the following tasks. Not all campaigns will require each of these positions, and sometimes these duties will be rolled into one person's job description or shared by multiple volunteers or staff.

 Remember: the priority for your campaign is Voter ID! Everyone on your team should understand how their role is contributing to you reaching your 60% Target to Win (TTW) # of identified supporters in your riding.

▼ Candidate

Candidates must be dedicated to promoting themselves and the party. That means spending as much time as possible getting to the doors and meeting with voters.

In order to be able to focus on those important tasks, candidates should work quickly to build and empower a team around them who can take care of the details required to run a campaign, and engage in efficient forms of fundraising to ensure that the campaign has the resources it needs.

Focus & tasks:

- Building a team
- Fundraising in personal networks
- Canvassing daily (especially evenings and weekends)
- Meeting local groups and community leaders in your riding

- Speaking to the media when opportunities arise
- Attending important events in your riding
- Preparing yourself for debates (building platform knowledge and practicing public speaking/debating)
- Attending (not planning) Kitchen Table Talks

▼ Campaign Manager (CM)

The Campaign Manager oversees all aspects of the campaign. They are the point person for all other campaign staff and work with the candidate to create a campaign plan. This position may be a paid position and is most effectively done full-time. A Campaign Manager works closely with the candidate and many times comes from the candidate's network of contacts. This person needs strong organizational skills and sound judgement. If your campaign is not large enough to have a full-time campaign manager, don't worry. Remember, canvassing is the most important task that you can take on to increase your TTW and votes in the election.

Focus & Tasks:

- Ensuring that all team members have defined roles and are performing the roles entrusted to them; helping other team members whenever needed.
- Overseeing the Candidate's & Campaign's calendar of activities in order to best prioritize the Candidate's time and Campaign's resources
- Making a list of the key people, organizations and events in the riding and making arrangements for the candidate to meet with them. Don't forget seniors' homes and long-term care facilities in the district!
- Coordinating with Party Staff to ensure the campaign has the resources and training it needs to succeed
- Ensuring all Elections BC rules are followed
- Approve and oversee all aspects of the campaign including:

- canvassing efforts
- budget and fundraising
- Outgoing communications and messaging

▼ **Financial Agent (FA)**

The Financial Agent is an individual appointed to administer the electoral financing requirements of the Election Act. This includes incurring expenses, accepting political contributions, recording financial transactions and filing the required financial reports with Elections BC. It also includes authorizing election advertising conducted on behalf of candidates.

⚠ You are responsible for ensuring all the rules in the Elections BC Guide for Financial Agents (455) are followed.

Focus and Tasks

- Ensuring all the rules in the Elections BC Guide for Financial Agents (455) are followed
- Ensuring all BC Green Financial rules and procedures are followed
- Ensuring correct procedures are followed at any events where contributions are collected
- Correctly tracking and filing all campaign expenses and contributions
- Depositing all cheques and credit card (if applicable) donations directly to the campaign bank account
- Ensuring any Team members who accept donations or incurs expenses:
 1. Are authorized to do so, as well as,
 2. Have been trained to follow Electoral Financing rules set out by Elections BC and the BC Green Party.
- Approving campaign spending
- Collecting all original expense receipts and safekeeping them to provide to the Elections BC after the campaign

- Issuing tax receipts for all Campaign donations

▼ Candidate's Person (Handler)

Someone needs to be with the Candidate at all community events, meetings, debates, and campaign activities. The candidate's person can be one person, or more likely, this role will be filled by various people throughout the campaign depending on the event or activity the candidate is attending.


The Candidate's person ensures the Candidate is able to talk to as many voters and stakeholders as possible by facilitating interactions, making sure the candidate doesn't spend too long talking to each voter, and by collecting contact information and follow-up actions from all interactions.

This person should also take pictures or videos of any speeches, activities or key moments for the campaign's communication efforts.

The handler should also ensure that the candidate is provided with briefings and necessary materials for each event, meeting, or media appearance. This includes talking points, background information, and strategic advice to navigate political discussions effectively.

▼ Volunteer Coordinator

The volunteer coordinator needs to work closely with all the other campaign team members to address their human resource needs.

 You are the first point of contact for most volunteers and are responsible for conveying the importance of Voter ID and how their tasks contribute to reaching your (TTW) #.

This person needs to be able to assign people tasks they are capable of doing. All tasks should (directly or indirectly) help the campaign reach its TTW# or be a stepping stone to a role that does.

The party will provide training and guidance on how to use GVote and other tools, to effectively organize and mobilize volunteers. A volunteer coordinator must be comfortable with computers in order to effectively use these systems.

Focus and Tasks

- Calling the lists of local party volunteers and supporters about getting involved in the campaign. And calling all volunteer regularly to get them out to help with campaign activities.
- Keeping your campaign's Volunteer Tracking Sheet (TEMPLATE) up to date
- Ensuring all your volunteers sign the BC Greens' Volunteer Agreement & Waiver
- Ensuring all volunteers who handle data or personal information receive Privacy Training Presentation
- Keeping all Volunteers' information up to date in Gvote
- Constantly gathering volunteers by contacting members in the district, as well as following up on information provided from events, mainstreeting, and telephone and door-to-door canvasses.

▼ Canvassing Lead

This person coordinates the canvassing of polls within the district. This consists of organizing material and working with the Volunteer Coordinator to staff daily canvasses or weekend canvassing events. This person should work closely with the Campaign Manager to ensure that priority polls are canvassed first and as often as necessary. Canvassing is the most important task on the campaign. Having a person responsible for systematically tackling this task is key to your electoral success. The Canvass Coordinator should be trained on GVote (the canvassing software & voter ID we use) and be comfortable using the program. Training and guides for the use of GVote will be provided.

Focus and Tasks

- Print and plan canvass routes
- Build walk-packs
- Provide training to canvassers: ensure they know the importance of collecting accurate data and contact info, and that consent is needed to collect all information
- Identify Strong Canvassers and train them to lead canvasses in their neighbourhoods

- Work with the Data Coordinator to ensure all canvassing data is returned, delivered to the data entry team, and input in a timely fashion

▼ Data Coordinator

A Data Entry Coordinator on a campaign plays a crucial role in managing and organizing critical data that supports the campaign's operations and strategic goals. This person is in charge of overseeing the data entry process for all campaign activities (canvassing, mainstreeting, events, Kitchen Table Talks, ect). You are responsible for ensuring the campaign is compliant with the **BC Green Party Privacy Policy** by ensuring that all data is properly handled and stored in the BC Green software (Gvote and your campaign's google drive).

This position involves a high level of precision and efficiency in entering, updating, and maintaining data in campaign databases and ensuring all volunteers are aware of the BC Green Party and campaign data policies and systems. The data handled may include voter information, donor records, volunteer details, and other relevant data that supports the campaign's outreach and mobilization efforts.

Focus and Tasks

- **Data Management:** Accurately enter, update, and maintain various types of data in the campaign's databases, ensuring high levels of data quality, integrity and adherence with the **BC Green Party Privacy**.
- **Database Maintenance:** Perform regular checks and maintenance on Gvote (the BC Greens database system) to ensure that all information is accurate, up-to-date, and securely stored.
- **Support Campaign Activities:** Provide crucial support to campaign activities by generating lists, reports, and insights from the database as needed for voter outreach, fundraising efforts, and volunteer mobilization.
- **Collaboration and Communication:** Work closely with other campaign staff, including field operatives, finance teams, and communications, to ensure data needs are met and to facilitate the effective use of data in campaign strategies.
- **Compliance and Security:** Ensure compliance with the **BC Green Party Privacy Policy** and BC's **Personal Information Protection Act's** (PIPA)

requirements for data management. Implement and maintain security measures to protect sensitive and personal information.

- **Training and Support:** Offer training and support to campaign staff and volunteers on data entry procedures and database management, ensuring consistency and accuracy in data handling.
- **Data Analysis Support:** Assist in analyzing campaign data to identify trends, measure performance against campaign goals, and inform decision-making processes.

▼ **Event Coordinator**

An Events Coordinator would be responsible for planning key campaign events such as a campaign launch, office grand opening, fundraisers and possibly other events as well. Someone with attention to detail and with event planning experience is ideal for this role.

An Event Lead on a campaign plays a pivotal role in planning, organizing, and executing events that are critical to the campaign's success. These events can range from small local gatherings and fundraising dinners to the campaign launch party and booth opportunities at community events.

The Event Lead must ensure each event is contributing to the Campaign's goal of Green Voter Identification and effectively communicates the campaign's messages, engages voters, and mobilizes supporters.

- **Event Planning and Strategy:** Develop and implement an event strategy that aligns with the campaign's goals and messaging. This includes setting objectives for each event, identifying target audiences, and determining the best formats and venues to engage those audiences.
- **Logistics Coordination:** Handle all logistical aspects of event planning, including venue selection, catering, audio-visual equipment, transportation, and accommodation arrangements, ensuring each event runs smoothly and professionally.
- **Team Management:** Lead and manage a team of staff and volunteers assigned to event planning and execution. This involves delegating tasks, overseeing work, and ensuring team members are adequately trained and prepared for their roles.

- **Vendor and Stakeholder Relations:** Negotiate with vendors and suppliers to secure goods and services at competitive prices. Work closely with stakeholders, including local leaders, community organizations, and other partners, to maximize event impact and reach.
- **Budget Management:** Develop and manage budgets for each event, ensuring that expenses are kept within allocated limits and ensuring the costs of the event do not outweigh the benefits.
- **Risk Management:** Identify potential risks associated with events and develop contingency plans to address these risks, ensuring the safety and security of participants, staff, and volunteers.
- **Promotion and Marketing:** Collaborate with the communications and social media leads to promote events through various channels, including social media, email newsletters, and local media, to maximize attendance and engagement.
- **Post-Event Analysis:** Conduct post-event evaluations to assess the effectiveness of each event in meeting its objectives. Gather feedback from participants, staff, and volunteers to identify areas for improvement.

▼ Fundraising Lead

The Fundraising Lead is responsible for working with the candidate and campaign manager to make a fundraising plan to meet the campaign's spending needs, and ensure that the plan is carried out.

Focus and tasks:

- Creating and overseeing the execution of the campaign's fundraising plan which should include the following:
 - **Calls:** Fundraising calls are most effective when done by the Candidate, to their own personal network and the list of donors in your riding provided by the BC Greens. Calls can also be performed by the campaign Manager and well-trained volunteers.
 - **Online Fundraising:** writing and sending texts, emails, social media. The Fundraising Coordinator would work with the Communications Lead on messaging.

- **Direct Mail:** sending physical mail, such as letters, brochures, and donation forms, directly to targeted supporters. The Fundraising Coordinator would work with the Communications Lead on messaging.
- **Fundraising Events:** events are a good fundraising method for mid-level donors, as events allow donors to interact personally with the candidate but they take a of resources to execute so they should not be your main source of fundraising. The Fundraising Coordinator would work with the Events Coordinator on events.

▼ **Communications Lead**

The Communications Lead will work closely with the Campaign Manager and Candidate to develop the key messages, campaign narrative and communication plan to get the Candidate's message out to voters. The campaign message should address local issues, and highlight BC Green platform planks that are most salient in your riding.

The Communications Lead is responsible for overseeing the campaign's communication strategies. This role involves developing and implementing communication plans that effectively convey the campaign's messages, values, and narrative to various audiences, including voters, volunteers, donors and stakeholders.

Focus and Tasks:

- **Strategic Communication Planning:** Develop and execute comprehensive communication strategies that support the campaign's objective of identifying Green voters, enhancing the candidate's reputation, and ensuring consistency in messaging across all platforms and mediums.
- **Media Relations:** Serve as a primary contact for the media. Build and maintain positive relationships with journalists and media outlets to promote the Candidate. Oversee the creation of press releases, media briefings, and public statements.
- **Brand Management:** Ensure that all external and internal communications reinforce the Candidate's narrative, key messages and BC Green values. Ensure all communications adhere to BC Green branding and communication policies.

- **Crisis Communication:** Work with the party, Campaign Manager and Candidate when potential crises arise, to develop and implement a crisis response plan that minimizes damage to the party and the Candidate.
- **Team Leadership and Management:** Oversee the communications team, setting goals, and timelines, managing projects, and guiding message development. Ensure the team's activities align with the overall campaign strategy.
- **Internal Communications:** Develop strategies and channels for effective internal communication to ensure staff and volunteers are informed, engaged, and aligned with the campaign's goals and messages.
- **Content Strategy:** Oversee the creation and distribution of engaging, high-quality content across various platforms, including websites, social media, and newsletters, as well as verbal communication at the door and on the phone.
- **Stakeholder Engagement:** Develop communication initiatives to target voters and inform key stakeholders, including voters, donors, volunteers, and community leaders.
- **Measurement and Analysis:** Implement tools and processes to measure the effectiveness of communication strategies, gathering insights to refine and improve future efforts.
- **Social Media Management:** Oversee or directly manage the candidate's presence on social media, ensuring that messages are consistent with other public communications and that engagement with the audience is effective and positive.
- The Comms Lead is also responsible for overseeing (or executing) the following roles (**Press Secretary, Social Media Coordinator, Designer**) depending on your campaign's resources.

▼ **Press Secretary**

Keeping track of local press contacts and keeping good relationships with local journalists. They schedule interviews for the Candidate with the local press and need to work closely with the Candidate and their campaign manager.

- **Media Relations:** Develop and maintain strong relationships with journalists, editors, and media outlets. Act as the primary point of contact for all media inquiries, coordinating interviews, press conferences, and media briefings.
- **Message Development and Dissemination:** Craft clear, consistent messages for the public and the media on behalf of the candidate. Prepare press releases, speeches, briefing materials, and statements that align with the campaign's objectives and messaging strategy.
- **Media Monitoring and Analysis:** Regularly monitor media coverage about the candidate, analyzing and reporting on the sentiment and impact. Use this information to inform strategies and messaging.
- **Event Coordination:** Plan and execute press events, including press conferences, interviews, and media briefings. Ensure that logistics are handled smoothly and that the events serve the organization's communication goals.

▼ Social Media Coordinator

The Social Media Coordinator is responsible for planning, implementing, and monitoring the Candidate's social media strategy in order to increase awareness, and help spread the Candidate's key messages. This role involves a blend of creative, analytical, and communication skills to engage with audiences across various social media platforms.

This person should also be the one who ensures that photos and videos of the candidate and campaign team in action are regularly posted to the Candidate's social media and ensures that messages are consistent with other public communications and that engagement with the audience is effective and positive.

Focus and Tasks

- **Develop and Implement Social Media Strategy:** Create a comprehensive social media strategy that aligns with the campaign's brand identity, marketing goals, and target audience. This includes choosing appropriate social media platforms, setting clear objectives, and defining metrics for success.

- **Content Creation and Management:** Plan, create, and manage engaging content across all social media platforms, including posts, stories, videos, and live broadcasts. This involves working closely with the Communications Lead and design teams to ensure content is informative, appealing, and aligned with the Campaign's message.
- **Analytics and Reporting:** Regularly analyze and report on the performance of social media campaigns and strategies, utilizing metrics such as engagement rates, follower growth, and website traffic. Use insights to refine and optimize future campaigns.
- **Stay Up-to-Date with Social Media Trends:** Keep abreast of the latest social media best practices, trends, and technologies. Adapt strategies as necessary to remain competitive and engaging on each platform.
- **Collaboration:** Work closely with other staff on the campaign to share all the key events, news messages and activities happening.

▼ Sign Manager

This person is responsible for organizing the distribution of signs within the riding and fulfilling sign requests to voters. For large signs on busy intersections or public land (such as along major roadways), the sign manager should strategically plan sign placement.

Campaigns are required to retrieve their signs within 48 hours of Election Day. It is critical that the campaign knows where all signs are in order to abide by this rule, so good records are critical. This person is also responsible for ensuring the signs are not put up in violation of municipal, provincial or federal regulations.

Signs on private property will be tracked using our voter database system, GVote. The party will provide a guide on how to use this system to generate sign-delivery or pick-up lists and maps.

A Sign Manager doesn't have to go it alone - they will need the help of a number of volunteers. For placement of large signs, it will be critical to find volunteers with vehicles that can transport the large signs and lumber, and who have power tools and know how to use them.

Particularly in rural districts, it is a good strategy to recruit "Sign Captains" in each community to help with sign distribution. Each Sign Captain can be given

a stock of signs, and then periodically provided with a list of people in their area who have requested one.

▼ **Office Manager**

If your campaign is large enough to have an office then you will need someone to ensure that the office is organized, staffed and clean. This person will need to work closely with the Volunteer Coordinator to ensure that there is always someone available at the office. They will be the record keeper for everything that moves in and out of the office space. It is helpful if this person is capable of arranging for the setup of phone lines, internet connection, campaign e-mail addresses, office furniture and supplies, computers, and anything else to be set up in the campaign office.

▼ **GOTV Lead**

This person is in charge of planning and implementing the campaign's AGOTV (Advanced Get Out The Vote) and GOTV (final Get Out The Vote) efforts. This person is often the Canvassing lead but this role can be filled separately.

The GOTV Lead will all work to ensure all Identified Strong and Weak Greens are reminded about voting days (via phone, email and in person) and get to the polls on voting days.