



CANDIDATE ACADEMY

A STEP-BY-STEP HANDBOOK FOR CANDIDATES
INTERESTED IN RUNNING FOR LOCAL OFFICE IN
CALIFORNIA



CALIFORNIA LOCAL ELECTED OFFICIALS

Calelecteds.org

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CLEO Candidate's Handbook **Session 0: Introduction**

California Local Elected Officials (CLEO)

WHAT IS CLEO?

California Local Elected Officials (CLEO) is a Project of the California Policy Center (CPC), a 501(c)(3) educational nonprofit. CLEO is a free, membership-based organization that supports local elected officials, leaders and candidates throughout California in school districts, city councils and county boards, as well as statewide and federally elected office holders and candidates. Its purpose is to help officials create greater prosperity for all Californians by focusing on three principles:

- Transparency
- Financial sustainability
- Freedom

CLEO accomplishes part of its mission by informing citizens of their rights and duties in running for office and by educating candidates on how to properly set up an effective campaign.

INTRODUCTION TO THE CANDIDATE ACADEMY TRAINING

This introduction outlines considerations for those thinking about running for office in California. Being a candidate is an all-consuming experience and can often be overwhelming. This Candidate Academy is designed to simplify the process and make it accessible to the first-time candidate as well as the seasoned politician.

In this session, potential and declared candidates are encouraged to think about the challenges that local elected officials face, what campaigns mean, and the broader ideas of governing should they win their election.

DISCLAIMERS

As a 501(c)(3) nonprofit, CPC is limited to education and issue advocacy and does not endorse a particular candidate or party.

CPC will train anyone who aligns with its mission of reducing governmental barriers to prosperity regardless of party affiliation.

CPC recommends that candidates independently validate their campaign plans with trusted family members, friends, associates and consultants.

PRESENTERS

Mari Barke – Mari is the director of CLEO and an elected trustee to the Orange County Board of Education. She served as board president from 2019-2020 and again from 2021-2022. She is a frequent public speaker on good governance and effective school board leadership. In addition to this Candidate Academy, Mari and Lance also produced virtual trainings for the CLEO Leadership Academy. Mari and Lance regularly join forces to provide in-person training to potential candidates and local leaders throughout the state. Prior to joining CPC, Mari was a finance executive in commercial insurance before taking over as president of a mid-sized independent retail clothing company in Southern California. A committed political activist, she has worked on presidential campaigns, and was a California delegate to her party's 2016 and 2020 national conventions.

Lance Christensen – Before joining CPC as the vice president of education policy and government affairs, Lance worked for nearly two decades in the California State Senate, and also as a finance budget analyst at the Department of Finance. Recently, Lance was a candidate for State Superintendent of Public Instruction in the November 2022 election. He is a seasoned politico and a policy expert who has been quoted and published by media outlets throughout California and the nation. Lance has degrees from Brigham Young University and Pepperdine University's School of Public Policy. Lance is a happily married father of 5, all of whom are seventh-generation Californians.

Jackson Reese – CPC's Vice President of Development, Jackson began his work at CPC managing the *Janus Project*. Jackson also consults in non-partisan political campaigns and worked with A2p, a national political consulting and digital marketing firm. Jackson has partnered with California charter schools to run their digital marketing campaigns, bringing in millions of dollars of recurring revenue to charter schools throughout the state. Jackson has a bachelor's degree in Political Science from Biola University and is a graduate of the RNC's State Director College.

OVERVIEW FOR THE COURSE

Holding public office can be very gratifying, but running for office is a huge commitment that should not be taken lightly. A well-prepared and organized candidate has a much higher chance of winning an election and making an impact once in office.

One of the rewards of becoming an elected official is knowing you can make a difference in your community. A disciplined candidate and officeholder will be better appreciated and respected by the constituents they serve, especially when campaign promises made as a candidate are kept.

The information below is intended to be a basic guide for anyone considering a campaign for elected office and is especially suited for local races. To get the greatest benefit from this course, please consider all of the material carefully and thoughtfully.

It is our hope that this material will aid you in making wise and prudent decisions before, during and after declaring your candidacy for local office. We look forward to helping educate you on this new adventure into public service in the following video sessions.

SESSION #0 – So You Really Want to Run for Office?

SESSION #1 – Setting the Stage

SESSION #2 – Developing the Plan

SESSION #3 – Pulling the Trigger

SESSION #4 – Understanding the Landscape

SESSION #5 – Strategic Communications

SESSION #6 – Bringing It Home

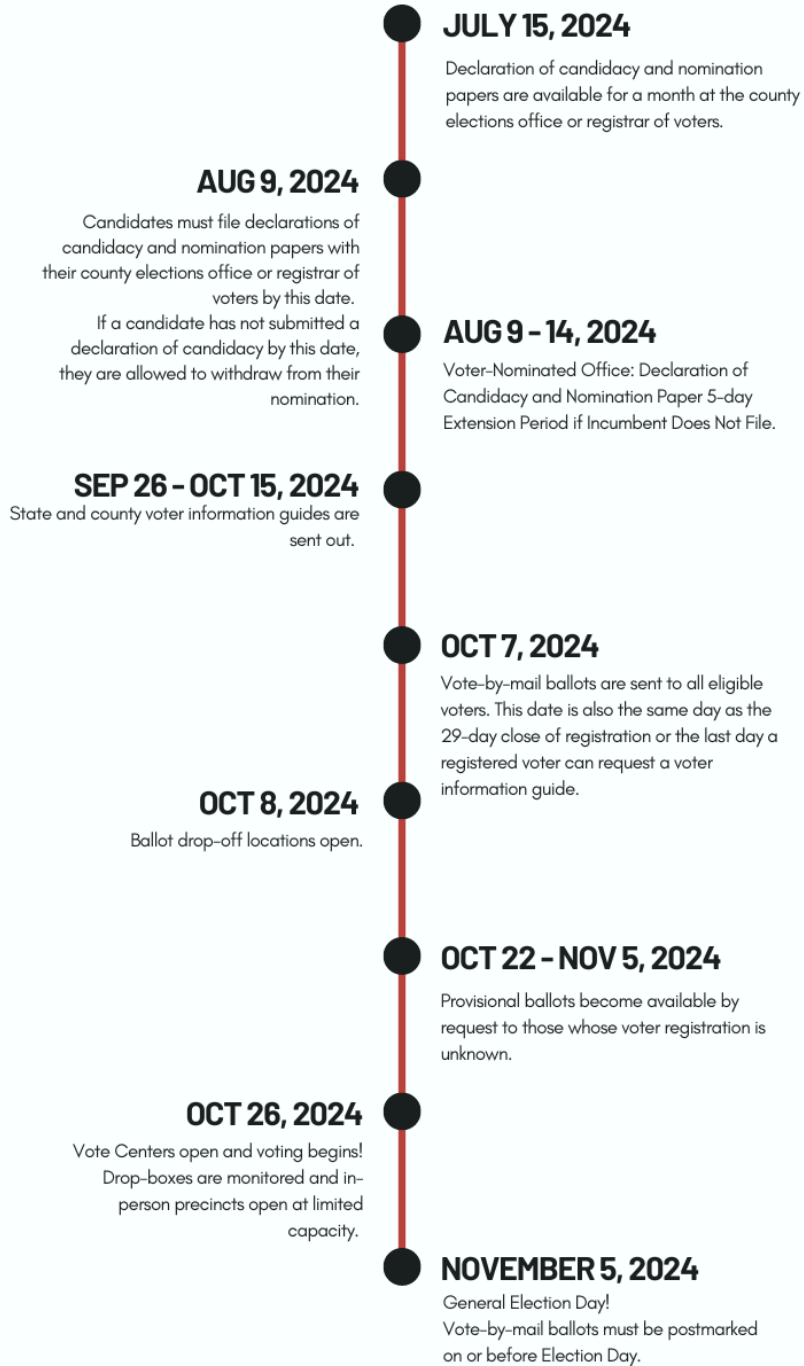
SESSION #7 – Keeping Campaigns Compliant

SESSION #8 – Campaign Budgeting

SESSION #9 – Fundraising

A TIMELINE OF YOUR **ELECTION**

ELECTION SEASON HAS PLENTY OF **DEADLINES**. HERE ARE SOME BASIC ONES FOR YOU TO BE MINDFUL OF.



For more information on California elections, visit
www.sos.ca.gov/elections
or your County registrar online.

FORMS

As with any official government action, there are a number of forms that must be completed to initiate your campaign, allow you to legally fundraise, and provide transparency for donations received. It is important to have someone help you with these forms, preferably someone with an accounting or compliance background. Paying a compliance officer or treasurer to handle such forms, and donation and expenditure reports, is one of the most important steps in every campaign.

REPORTING REQUIREMENTS DURING AND AFTER THE CAMPAIGN

If you are running for a local elected position, there are various reporting requirements for you and/or the committee after the election depending on the success of the campaign or the term of the committee. Additional information on these requirements can be found in Chapter 11 of the Disclosure Manual 2 for local campaigns on the [Fair Political Practices Commission's website](#).

Candidates can pay filing fees in a variety of ways including cash, personal or certified check, credit card and postal money order. If a candidate pays the filing fee in cash and that filing fee is payable to the Secretary of State, an additional charge for obtaining a certified check will be charged. Failure to file or a late filing of campaign disclosure statements could result in monetary fines.

For further questions, candidates can refer to the:

Secretary of State website:

<https://www.sos.ca.gov/campaign-lobbying/campaign-disclosure-and-requirements/campaign-filing-requirements/>

Fair Political Practices Commission (FPPC) website:

<https://www.fppc.ca.gov/learn/campaign-rules/where-and-when-to-file-campaign-statements/when-to-file-campaign-statements-state-local-filing-schedules.html>.

The FPPC can process quick questions over the phone at 1-866-275-3772 or by email at advice@fppc.ca.gov. If you are looking for legal advice, you must submit that in writing to FPPC's legal team by email.



State of California FPCC

Campaign Compliance Checklist

- File Form 501: Intention of Candidacy**
The statement of intent to run for office, [Form 501](#) must be filed **before** any money is raised toward your election. The only exception is when personal funds are used to pay a filing/ballot statement fee.

Candidates Raising and Spending Less than \$2,000

- File Form 470: Officeholder & Candidate Campaign Statement Short Form**
A [Form 470](#) is filed by candidates who have no control committee and do not anticipate spending more than \$2,000, including personal funds, within a calendar year.

Candidates Raising and Spending More than \$2,000

- File Form 410: Statement of Organization**
[Form 410](#) is filed by candidates who raise or spend more than \$2,000 in a calendar year and must be filed within 10 days of qualifying. File one copy locally and a second with the Secretary of State.
- Open a Campaign Bank Account**
All monetary contributions must be deposited into a campaign bank account. Never deposit campaign contributions into a personal account.

- Committee Treasurer**
Every Committee is required to appoint a treasurer. The individual listed on the [Form 410](#), filed with the Secretary of State, is legally liable until you designate a new treasurer by amendment. A candidate may act as his or her own treasurer.

- File Campaign Statements**
You must file a [Form 460](#) disclosing committee activity during a specified period. Find the filing schedule that applies to your election online. Committees are required to file statements as well as other reports including semi-annual campaign statements until it terminates.

24 Hour Reports

- In the 90 days before the election, including the day of, if a committee receives any contribution of \$1,000 or more from a single source, including loans from the candidate, [Form 497](#) must be filed within 24 hours. If another organization spends money on behalf of your campaign, you must also file a [Form 496](#) within 24 hours of notification of expenditure.

Local Campaign Contribution Limits

- Be aware of local limits on contributions before accepting them.

After the Election

- After your election passes, you are responsible to file campaign statements until your committee terminates. To do so, file a [Form 460](#) with the local filing officer reporting a zero balance, **and** a [Form 410](#) indicating the termination with the Secretary of State's office and a copy to the local filing officer.

BALLOT STATEMENTS

The Candidate's Statement of Qualifications, or Ballot Statement, helps candidates introduce themselves to the voter. It explains the candidate's background and why they feel they are the best candidate for the position they are seeking. The deadline for this statement is August 9, 2024.

NONPARTISAN OFFICES

Candidates running for a nonpartisan elected office may prepare their statement on a form provided by the county elections official. Depending on the governing body, a statement may be only 200 words or as much as 400 words for an additional cost.

The statement must be filed in the office of the elections official no later than the 88th day before the election which is **August 9, 2024, 5:00 p.m.**, if it is for an election, for which nomination papers are not required to be filed. Costs of providing statements to voters are paid by the candidates. The statement **may be withdrawn, but not changed**, during the period for filing nomination papers and until **5:00 p.m.** the next working day after the close of the nomination period.

If the official organizing the election allows electronic distribution of a candidate's statement, the governing body of a local agency may permit each candidate for nonpartisan office to prepare a free candidate's statement for the purpose of electronic distribution. An electronic statement would be posted in a voter information guide that is electronically distributed, but would not be included in a voter information guide that is printed and mailed to voters.

The registrar of voters will require each candidate filing a written Candidate's Statement to pay in advance as a condition of having his/her statement included in the Voter Information Guide. The cost covers expenses for language translation, typesetting, printing and labor in the processing of a candidate's statement. Payment may be made by cash, check, money order, certified check and credit card.

The candidate must also sign a Candidate's Statement Agreement at the time the statement is filed. A copy of the signed agreement and signed statement will be given to the candidate.



CLEO Candidate's Handbook

Session 1: Setting the Stage

INTRODUCTION

This session will set the stage for running for office and provide a series of key considerations in deciding to run for office. A thoughtful candidate will have done their research on the problems associated with the position they are seeking and be able to articulate why they are the right person to address those issues.

At the end of this session, candidates will be challenged to put together a pro/con list for the race.

CONSIDERATIONS

Think about all of the reasons that you may want to run for office:

- Are you concerned, compelled or stubborn?
- What is/are the issue(s) or concerns that drive you to run?
- Are there other better candidates for this particular office?
- What do others think about the office for which you are seeking?
- Who have you talked to about running for office?
- Should you speak with more people or those with contrarian positions?
- What is the right office for you and why are you uniquely qualified?
- Why this office and not another?
- What is your platform or how do you intend to address the issues you are worried about?

LOOK AT THE BIG PICTURE

Get a sense of the playing field in a variety of ways:

- Verify who is competing for the office.
- Obtain feedback from your family, employer, associates, colleagues, friends, neighbors, peer groups, the community, potential donors, local associations and business groups, chambers, service clubs, religious organizations (churches and synagogues), and politicians.

- Does polling make sense, informal, straw, formal, news, political orgs, or other?
- Process feedback and results from polling.
- Can you raise enough money to compete?
- Are you doing this as a vanity project or are you planning on winning?

DYNAMICS OF THE RACE?

Consider the power structure and dynamics of the *current* office, board or council. The boundaries and demographics of the district are also essential to know.

It is up to you to fully understand the financial decision-making authority for the office and if you, once elected to office, can actually change the trajectory of the governing body. Have you done basic research including position interviews, reviewed online materials, navigated Wikipedia, and toured official and casual social media accounts and news articles for and about the seats or positions?

Are other like-minded candidates running in adjacent seats, positions? Are there benefits to running as a slate?

Who are the friendlies, supporters, proxies? Who are your political foes? Do some supporters become foes if other political lines are crossed? How can you make sure you are not making enemies unnecessarily?

SOME BASIC ELECTION RESOURCES

Some relevant election websites include, but are not limited to:

- Fair Political Practices Commission (FPPC) “promote[s] the integrity of state and local government in California through fair, impartial interpretation and enforcement of political campaign, lobbying and conflict of interest laws.”
<https://www.fppc.ca.gov/about-fppc.html>
- County Registrar of Voters – Examples include:
 - Los Angeles County: lavote.gov
 - San Diego County: sdvote.com
 - Orange County: ocvote.gov
- Ballotpedia.com
- WeDrawtheLinesCA.org

IF ELECTED...

It is one thing to run for office, but it is another to actually win and then assume that office.

- Do you know what you are going to do financially should you succeed? Is the position paid?
- Does it include health care or retirement benefits?
- Will it be a full-time or part-time commitment?
- What is the reality of winning the office?
- Are there any ethical considerations or potential conflicts of interest?
- What are the impacts on family, career?
- Intensity and time commitment of the campaign.
- Employer awareness and accommodations for time-off work.
- Family commitment and exposure.
- Will you need to quit your job if you win?

SESSION #1 – CHALLENGE

Put together a comprehensive PRO and CON list.

In order to be successful in a campaign, a candidate needs to seriously reflect on the challenges ahead and be acutely aware of, and honest about, any number of issues in and out of the campaign, especially as they relate to their family, career and associates.

In making a pro and con list:

- List every good thing you can think of about yourself, experience, talents, skills, and abilities.
- Is this a vanity project?
- List every terrible and controversial issue you have, including messy family situations, negative news stories, social media presence, criminal record, lawsuits pertaining to you, work history, as well as addictions, mental or emotional history.
- Again, think about your family and internal controversies which could be brought to light during your candidacy.
- Be brutally honest; address objections to your candidacy forthrightly.
- Do not oversimplify your candidacy or create strawman objections to it.
- Evaluate your resources.
- Look at your candidacy from the outside; consider that local sentiments may not have an impact on voter sentiment by the broader population.
- What do you gain by running?
- What do you lose if you enter the race?
- What happens should you win?

PROS

CONS



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Session 2: Developing the Plan

INTRODUCTION

This session will help the candidate develop a plan, a campaign team and basic talking points. It will also give you insights on how to best connect with your target audience – voters.

At the end of this session, candidates will be challenged to write an impactful elevator speech.

LAYING THE FOUNDATION

You have surveyed the field, created a pro and con list and have decided to move forward. Now is the time to get down to business and address technical compliance issues.

In explaining why you should attain the office, you need to:

- Have credibility and confidence.
- Be nimble with essential facts and figures.
- Provide perspective and context.
- Develop appropriate slogans, talking points and speeches.

MANAGING COMPLEX CAMPAIGN LAWS & REGULATIONS

These are technical pieces of your campaign you want to get right:

- Unless you have a very capable and dependable friend or associate willing to be responsible for complex and burdensome campaign paperwork including filings, bank account, contribution processing, etc., it is a good idea to contract with a good treasurer or compliance officer. This is one area where it is worth spending money.
- Form a trusted finance committee and develop a finance plan with them.
- Access to a reputable attorney for difficult election regulations. You likely will not need them, and if you are a small campaign, they may offer pro bono legal counsel if it is specific and does not require a lot of research.

- Create a campaign team which may include a:
 - Consultant to oversee high-level issues and considerations as well as develop a strategy.
 - Campaign manager to watch over tactical, day-to-day operational tasks
 - Field team to implement tactical plan, coordinate volunteers, fundraise, schedule events and organize surrogates – these positions should all be scalable to the size of your campaign.
- Understanding basic requirements from the Secretary of State, Fair Political Practices Commission (FPPC) and county registrar of voters, as well as their various resources.
- Know the rules on identifying your campaign identification number and “Paid for by...” requirements. For instance, campaign identification numbers are not required to be on lawn signs but should be on all your letterhead.

ADDITIONAL CONSIDERATIONS

Before you get too far into communicating your candidacy, consider the following:

- Calendar for events and deadlines, interviews, family time and other activities.
- Activists and political party leadership.
- Clearing the field in a legal and ethical manner. It is illegal to offer something to someone to stop their campaign, so it is often wise to allow other community leaders to have the necessary conversations with other candidates in the field.
- Clarity with campaign staff that they are working with you because they believe in your candidacy and cause, not because they will be given a job should you win your race.
- Other various non-monetary ways people can contribute to your campaign (in-kind donations, endorsements, hosting events, connecting to influencers, earned media, etc.).
- Required disclosure forms like the FPPC Form 700. Funding needs for campaign and fundraising ability with small dollar donors and other large donors, political action committees and other supporting organizations.

ANATOMY OF A SLOGAN

A slogan should be the essence of your campaign, simply stated in one phrase.

- Why are you really running for office?
- What are the issues, problems and challenges to overcome?
- What can or needs to be done?
- How can you fix it?
- Why will people follow and support your candidacy?
- Be succinct!

CREATING AN EFFECTIVE ELEVATOR SPEECH

You must be able to articulate reasons for running on multiple levels.

- Ethos (credibility), pathos (emotion) with logos (rationality)
- Biographical
- Relatable
- From the heart
- Memorized
- Relevant facts and figures

GETTING THE WORD OUT

Communicating your candidacy should be done in some version of the following order:

- Immediate family (especially your spouse).
- Employer, close colleagues and friends.
- The group that provided feedback when you were initially considering running.
- Political party.
- Media lists.
- Personal platforms, social media.
- Public at large.

REGULARLY COMMUNICATING WITH SUPPORTERS

How will you get people to support, endorse and donate to your race?

- Emails
- Social media
- Campaign website
- Video presentations
- Meet and greets, coffees
- Town halls, debates and forums
- Fundraisers
- Interviews and earned media on TV, radio, podcasts and other platforms
- Local activists

SESSION #2 – CHALLENGE

Write your elevator speech and memorize it.

Now is the time to write your elevator speech! This speech should:

- Be customizable and adaptable to your audience.
- Create several variations and versions, including:
 - One phrase, slogan
 - 7 seconds in the elevator or at the door
 - 30 seconds with a VIP or donor, “Rule of 3” talking points
 - 3 minutes for an event or interview
 - 7 minutes – avoid speaking for too long; consider question and answer options should you want to go longer.
- Remember this speech conveys why **YOU** are running for this office!

If you are personable, honest and passionate, these versions will all be easy to memorize.



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Session 3: Pulling the Trigger

INTRODUCTION

This session will assist the candidate in preparing to pull the trigger on their campaign and consider how to communicate internally, externally and discretely about the race in light of other community and political players.

At the end of this session, candidates will be challenged to list out real, perceived and potential supporters and opponents to their candidacy.

ARE YOU REALLY SURE?

You have made it this far, so it is time to be all-in. Minor doubts and concerns are not necessarily bad since they will keep you mindful.

- Having a broad perspective of the challenges allows you to realistically see the contours of the campaign trail.
- Has anyone expressed concerns about your decision or the trajectory of the campaign?
- Are there logistical hurdles that seem difficult to overcome?
- Are you gaining more supporters and volunteers or losing them?
- Are you achieving your fundraising goals?

TIME TO ANNOUNCE

You have prepared to make the campaign official and public. The announcement flows better if properly choreographed.

- Internal conversations may leak, perhaps intentionally.
- Filing paperwork is public.
- Fundraising reports are public.
- Press releases, other media.
- Key endorsements.
- Insider buzz.

CAMPAIGN KICK-OFF

Implementing plans for your district:

- Political party participation (only if you want or need partisan help and resources).
- Campaign office/facilities, home office or share with other candidates.
- Voter contact platforms and apps.
- Knocking doors with strategic walk-lists.
- Printed materials, slates.
- Mail budget.
- Events/fundraisers/rallies.
- Thoughtful sign placement at places of influence, and business and community leaders' properties.
- Coordination with adjacent, friendly races.

CAMPAIGN MATERIALS

The size and significance of your race will dictate the need for campaign materials (in consultation with your campaign team) and may include the following:

- Website, videos and bios
 - Issue and position statements
 - Supporter testimonials
 - Endorsements
 - Positive articles, media stories
- Logos, artwork, slogans
- Social media platforms
- Press list (i.e. newspaper, radio, TV, bloggers)
- Flyers, walk pieces, mailers, envelopes for donations
- Signs and banners (if necessary)

MEDIA MATTERS!

Media is everything for a campaign – make it good, interesting and easily shareable.

- Earned media
- Paid media
- Social media
- Viral videos
- Radio
- Podcasts
- Local newsletters
- Email chains

UNDERSTANDING YOUR SURROUNDINGS

Understanding the opposition and other political forces is essential to winning.

- Who are your opponents?
- What are their talking points?
- Is there any truth in what they are saying?
- Are you prepared to ignore, dismiss, or substantially refute your opponents?
- Is a government union involved?
- What is the narrative and media response?
- Who are the trolls, “black widows,” or other toxic people and organizations to avoid?

Trust willing proxies and surrogates to take on opponents, so you can focus on campaigning.

POSITION STATEMENTS

You do not need to be a policy expert, but good policy makes good politics.

- Avoid being dogmatic or polemic.
- Serious conversations with voters will distill important issues.
- Defined principles and boundaries buffers you against transactional politics.
- Pivoting or flexibility on certain issues without dramatic policy shifts.

- Give yourself room to research and report back on difficult issues.
- Should you commit to any position, that issue will follow you for a long time.
- Preemptively prepare for responses to the press.
- Be aware of contrarian or impulsive reactions.

UNDERSTANDING OPPOSITION ARGUMENTS

Anticipating what the opposition thinks and is communicating about you can fortify your candidacy.

- Addressing common objections.
- Reading material from or about the other campaign.
- Listening to allies share concerns.
- Self-awareness, recognizing and constraining difficult positions and issues.
- Other groups – unions, political parties, surrogates, trolls, special interests.
- Understanding layers to opposition – narrative, substance, spin, false flags.

KEEP UP COMMUNICATIONS

Your supporters want to know how the campaign is progressing and that you are moving in the right direction.

- Regular contact through emails, newsletters, texts and calls is essential.
- Websites should be clean, simple and intuitive.
- Social media needs to be engaging and responsive.
- Earned media, interviews and ICYMI give you valuable press time.
- Share updates with proxies.

MORE SUPPORT IS NECESSARY

- Party endorsement
- Independent expenditures (for which you are prohibited from coordinating)
 - 501(c)(4)
 - Political Action Committees
- Community/thought leaders

- Celebrities
- Endorsing entities, questionnaires are important to consider and evaluate
- Use of endorsements publicly and privately
- Consider your audience when sharing endorsements

FUNDRAISING IS KEY

- Amount of money spent on this race or similar campaigns in the past
- Size of the budget
- Ability to raise funds to cover costs
- Identifying key donors
- Preparing a pitch to ask for more money from supporters
- Opening a compliant bank account and having a registered campaign account for fundraising
- Procuring a treasurer to track all funds and reports
- Having a portal and mailing address for funds raised
- Printing donor envelopes

SESSION #3 – CHALLENGE

Make a list of supporters and opponents.

- Divide supporters into various levels, groups, and localities
- Everyone is a potential donor
- Volunteers and grassroots
- Potential endorsers
- Opposition's supporters
- Neutralizing competition
- Politicos over the years

Supporters

Opponents



CLEO Candidate's Handbook

Session 4: Understanding the Landscape

INTRODUCTION

Many candidates decide to run for office before they even understand what their trustee area or district looks like. Smaller areas can host affordable and more economic races – while larger areas may present bigger challenges or more sophisticated challengers.

THREE TYPES OF ELECTIONS

District Wide

- All candidates run in the same contest for all open seats.
- All candidates run district-wide in the same contest.
- All district voters get one vote per open seat.
- The top vote-getters win open seats.

Trustee Area

- District is split into multiple trustee areas – equal in population. These trustee areas can change at each census.
- All candidates compete to represent only the trustee area in which they live.
- All district voters get one vote and can only vote for candidates from their trustee area.
- The top vote-getter for each individual contest represents that trustee area.

Hybrid

- District is split into multiple trustee areas – equal in population. These trustee areas can change at each census.
- Candidates can only compete to represent the trustee area in which they live.
- All district voters in the entire school district get to vote for each individual contest.
- The top vote-getter for each individual contest represents that trustee area.

STAKEHOLDERS

Stakeholders are significant figures in the local community whose endorsements could significantly boost your electoral chances. Often these are people with large social influence, particularly leaders in their fields.

Be looking for potential stakeholders for your campaign in:

- Church leaders
- Party leaders
- Major donors
- Potential endorsements
- Activists
- Social Clubs

SESSION #4 – CHALLENGE

Figure out what kind of election you have in your district and who the significant stakeholders are.



CLEO Candidate's Handbook

Session 5: Strategic Communications

INTRODUCTION

Strategic communications is where strategy turns tactical. This is where organized and hardworking candidates start to really set themselves apart from the competition. Below is a list of ways that candidates can connect with voters in their districts.

Door Knocking – This is by far the most important and cost effective way to get your name out in the community. For partisan races, connecting with a voter increases their likelihood to vote for you by 8%. For school board races, that number is significantly higher. Take advantage of video doorbells (for example, Ring) to share your message!

Slate Mail – Slate mail cards are pre-designed and organized mail pieces that are sent from a third party. Candidates pay to be included alongside a “slate” of candidates to be supported by the slate company. Some only sell to Republicans, others sell to any candidate so be careful. Your party will know the major slate vendors in your area.

Digital Marketing/Social Media – Social media is quickly becoming one of the most cost-effective ways to connect with your constituents. It is pay-to-play, so be prepared to spend some money, but the chance to “go-viral,” boost your name recognition, or expand your reach organically is well worth the cost.

Direct Mail – Direct mail can get pricey quickly – but you do not have to deal with being slated alongside other candidates. Along with the price comes the need for the candidate to do far more work on the design, compliance, targeting and communicating with a mailhouse to get these printed, postmarked and sent.

Yard Signs – Are they worth it? Short answer – no. Signs only tend to be effective when they are in the yards of well-respected community members. They can cost between \$6 – \$10 a sign and quickly can become major expenses for small campaigns.

Text/Phone Call to Voters – Robocalls and P2P texting are easy ways to get your name out. They may be a bit pricey, but can be pretty effective if done well.

Local News Outlets – Never forget about the power of local press. Journalists are constantly looking for a good story and your race may provide them with just that! Reach out on Twitter or over email to your local press corps to see if they would cover your race or allow you to submit an Op-Ed about the state of your local schools or another timely topic.

Voters/activist groups – Take every opportunity to connect with organic groups of people who are politically in touch. Many activists account for dozens of votes as their friends often lean heavily on their perspectives on election day. Build relationships with the CRA, women’s federated groups, even the PTA to grow your base of support.

SESSION #5 – CHALLENGE

Develop out a plan for strategic communications that involves your core team, your communications process, your volunteers, and other supporters.



CLEO Candidate's Handbook

Session 6: Bringing it Home

INTRODUCTION

This session will assist the candidate in making an honest assessment of the campaign and provide ideas to deal with some of the challenges, issues and anxieties associated with the race.

At the end of this session, candidates will make an honest assessment of the campaign and determine any adjustments that need to be made.

DOUBT NOT, FEAR NOT

You made it this far – are there any lingering doubts?

- Can your doubts be overcome?
- Be aware of challenges without succumbing to anxiety.
- Power of positive thinking, optimism in the campaign and the will of the people.
- Do not be overconfident.
- An attitude for success without claiming victory is important.
- Vision and mission for a better day.

ASSESSING THE CAMPAIGN

Are there any strategic changes needed?

- Updated polling or surveys done internally or from other sources can help re-assess strategies.
- How well are you communicating with your:
 - Staff and advisors
 - Volunteers and grassroots activists
 - Donors, power brokers
 - Community, voters, constituents
 - Media

- Are your surrogates staying on message and getting out the voters?
- Is your campaign functional enough so that you can make fundraising calls?
- Consider any shifts in priorities and how they may impact the campaign budget.

REMEMBER, YOU OWN YOUR CAMPAIGN; IT IS YOURS!

KEEP PRIORITIES IN ORDER

While you are consumed with your campaign, make sure it does not consume you.

- Create and tend boundaries with family and other obligations.
- Manage highest priorities.
- Prioritize activities such as:
 - Walking
 - Phone calls, texts, emails
 - Fundraising, events, rallies, debates
 - Check campaign signs to make sure they are still there

A MARATHON, NOT A SPRINT

The race will feel like it is going to never end, but it does quickly.

- Stay energized and optimistic.
- Be aware and listen to the feedback loops.
- Avoid burnout with you, family, volunteers, supporters and surrogates.
- Keep the troops motivated through regular and uplifting communication.
- Consider how well other campaigns are working with your team and if strategic alliances are possible (or to be avoided).
- Do not forget that much of politics is a highly choreographed Kabuki dance.

GET OUT THE VOTE

As you get closer to the election, understand your timeline and calendar.

- Know when ballots drop and have a harvesting plan.
- Be aware of windows to buy advertisements and slate mailers.
- Organize get out the vote (GOTV) operations.

- Have a good script to harvest ballots.
- Know and share polling places and drop off box locations.
- Coordinate, as necessary, with other local campaigns.
- Remain positive about election integrity – you do not want to depress your voter turnout.
- Encourage people to follow their ballot at:
<https://voterguide.sos.ca.gov/voter-info/wheres-my-ballot.htm>

ELECTION NIGHT

You are almost there, but stay focused on the goal, keep your head down, stay positive, and keep your troops motivated and working until the very end. If you are going to participate in any election night festivities:

- Consider an event with other friendly, adjacent candidates.
- Let someone else plan a simple, economic election night gathering.
- Do not start celebrating before the polls close.
- Have a celebration and concession speech prepared. Recognize and thank family, friends, supporters, volunteers and staff no matter what happens.
- If you feel like you need to call your opponent(s) after the race, have someone find their cellphone numbers the week before.

SESSION #6 – CHALLENGE

Take the temperature of your campaign, assessing any problems or needs.

- Keep looking forward and moving in the right direction.
- Pivot when necessary, especially if local circumstances change.
- Let surrogates contend with antagonists and negative media.
- Learn how to deal with devastation and betrayal.
- Where applicable and feasible, review updated polling.
- Review shifts in priorities and adjust your campaign budget accordingly.
- Stay focused on a well-disciplined message.



CLEO Candidate’s Handbook

Session 6: Bringing it Home

SESSION 6 HANDOUT: SELF-ASSESSMENT

Take the temperature of your campaign, assessing any problems or needs.

Review the following metrics to determine how well you are executing your campaign.

Consider how your campaign could and should improve and adapt and which changes are necessary.

Direction: Keeping track of your goals while moving forward can be tough. Are you following your campaign plan?

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Flexibility: Pivot when necessary, especially if local circumstances change. You need to remain electable.

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Priorities: Let surrogates contend with negative media, opponents and antagonists to preserve your time.

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Cohesion: Are all parts of your campaign working together? Core messages should resonate across all platforms.

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Updates: Update key stakeholders frequently to ensure public support. You want the public to like your message.

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Message: Stay focused on a well disciplined message. How does your message fit into the national and local conversation?

Poor			Neutral				Well		
1	2	3	4	5	6	7	8	9	10

Write down a few things your campaign should change to catch on **fire**



CLEO Candidate's Handbook Session 7: Keeping Campaigns Compliant

INTRODUCTION

This session will assist the candidate in understanding the nuance of campaign rules and regulations, largely imposed by the FPPC, or Fair Political Practices Commission. The candidate will learn the importance of a treasurer in order to focus more on the smooth campaign operations instead of the obligatory forms.

At the end of this session, candidates will track compliance obligations and documents necessary for the campaign.

THE TREASURER OR COMPLIANCE OFFICER

Arguably the most important campaign staff member, the treasurer (or compliance officer) ensures smooth operation of the campaign's legal compliance to ensure fair elections. Roles include:

- Signing and filing all committee reports and statements.
- Depositing receipts in the committee's designated bank within 10 days of receipt. Special rules apply for donations over \$1,000.
- Authorizing expenditures or appoint someone else (orally or in writing) to authorize expenditures.
- Monitoring contributions, ensuring they comply with legal limits and prohibitions.
- Keeping records of receipts and disbursements for three years from the filing date of the report to which they relate.

BREAKING CAMPAIGN COMPLIANCE

Campaigns of all sizes need to comply with the federal, state and local requirements which all have consequences if those standards are not met. If a campaign is improperly run, consequences include:

- Fines greater than \$50,000 and potential jail time;
- Disqualification from office.

SESSION #7 – CHALLENGE

This section is meant to give you an idea of which forms are necessary. The information included is not intended for candidates to rely on to be their own treasurer. Refer to and memorize the checklist included on page 6 as you create a campaign committee.

Compliance will make or break your campaign. A professional treasurer can make all the difference in helping you comply with all applicable election laws.



CLEO Candidate's Handbook

Session 8: Campaign Budgeting

INTRODUCTION

A campaign budget is what you plan to spend over the course of your campaign – from initial filing fees all the way through final compliance costs – in relation to what you are able to fundraise.

Determining your budget includes several factors, including, but not limited to:

- Size and make up of the district
- Perceived prestige of that office
- Relationship to opponents war chest and resources
- Number of candidates in the race, whether they are incumbents or challengers and their favorability rankings and recognition in the area
- Personal wealth or immediate access to donors with resources
- Organization of the campaign, including paid and volunteer staff
- Size of the media market
- Ability to capture high-value endorsements, proxies and earned media
- Need to overcome controversies or other political baggage
- Interest of other parties, political action groups and campaign organizations
- Number of voters who need to be reached
- Willingness to fundraise

A serious campaign budget will need to identify how much money you are willing to raise and spend to reach the largest number of voters who will turnout to the ballot box. A well thought out budget will assist you in allocating your resources wisely while avoiding overspending. It will also be helpful in measuring your return on investment to donors.

As a general rule, you should not exceed your campaign's budget. However, there are situations where you will need to change your priorities, and conversely, revise your budget up or down due to new information or circumstances. If you increase your budget make sure you have a plan on how to achieve your new goals with fundraising.

You should be constantly monitoring your budget to make necessary adjustments. Consider the information below.

IDENTIFY CAMPAIGN GOALS AND OBJECTIVES

A clear vision of your campaign is very important in deciding how to prioritize and allocate your funds. Every campaign is different, so spend time upfront to ensure that you have specific and achievable goals that make sense for your particular campaign. Budgeting success can be measured in various ways, but should ultimately be focused on a basic metric: how much money is required to get a vote? It is important to constantly monitor spending against goals so that you are not overspending and having to constantly make unnecessary adjustments. Some adjustments will be necessary.

ESTIMATE CAMPAIGN INCOME AND EXPENSES

Income and expenses can vary widely depending on the size of your race and district. A basic rule of thumb is that at least two-thirds of your campaign expenses should be for direct voter contact with as little overhead costs as possible. Small or rural districts may have an inverted cost structure depending on their needs. Regardless of the size of a campaign, finding a trustworthy & detail-oriented treasurer or compliance officer – paid or volunteer – is essential. Do not try to account for all fundraising, expenditures and necessary paperwork to file on your own. You should always have a second set of eyes on your campaign budget.

It is very important to estimate how much money you will be able to raise and/or how much you are willing to self-fund or loan to your campaign. Are there additional sources of campaign funds other than friends and family? What donors small and large are interested in your campaign or the issues that your campaign is targeting? Which businesses might be interested in your campaign.

There are some important laws to be aware of that might affect donations such as SB 1439 which was signed into law by Governor Newsom and took effect January 2023. It basically says that local elected officials cannot vote on matters that have a direct financial effect on interests that have contributed \$250 or more in the previous year. It could come into play if you take money from a charter school founder who then comes before your board for a vote.

There are resources you can use to forecast expenses for a feasible budget, but a simple spreadsheet can often do the job. Keep in mind that costs on all types of goods and services have increased over the last several years, including but not limited to paper, postage, fuel and travel. Your template or tool should help you list all of your income and

expenses for easy tracking with income and expense categories that are clear, accurate and flexible.

There is a sample budget at the end of this section.

ALLOCATING YOUR FUNDS IS KEY

How you allocate your funds is critical to the budgeting process and flexibility is important here focusing on your top priority of connecting directly with voters. A realistic forecast will help to avoid any unnecessary or significant adjustments down the road. If possible, avoid spending too much or too little on any category. Always ask yourself, “Is this the best use of my resources?” You may love yard signs, but depending on your budget, they may not be the best use of your dollars.

There are “hard costs” and “soft costs” and it is important to know which is which. Hard costs are usually fixed and would include filing costs, postage on things you mail, the costs of signs. Soft costs can often be negotiated. Consultants understand that they are going to provide a service for a campaign that might be tight on funds and they may be willing to adjust their payment schedule or modify the terms of the agreement if necessary. Mail houses or slate mailer services may be willing to come down in price if you adjust timing, use bulk rates or wait till rates come down.

Most local campaigns need very little dedicated office space outside of one’s home or garage. If there is a need to have more space for volunteers or staff, consider subletting from an overlapping campaign or asking a landlord for a donation or reduced price for office space. You may be required to cover cleaning costs and utility bills, but if you do receive donated space, consult with your treasurer or compliance officer about reporting requirements for in kind donations.

Also consider the return on investment for your donors. Some donors will ask for an accounting or will be watching how you spend your dollars, which may lead to more fundraising from them or their associates should you prove to be wise with your budget.

TRACKING YOUR SPENDING IS CRITICAL

Tracking fundraising and budget expenditures is something you and a trusted person must do throughout your campaign. You should be comparing dollars spent to dollars allocated to dollars raised. When considering making adjustments, look at whether you are hitting your campaign goals. If not, consider what adjustments might be needed.

Feedback from your campaign team and constituents is important. Sometimes an event out of your control might cause you to reallocate resources. Make sure that staff and volunteers are keeping track of all invoices and contracts and that they are paid in a timely manner. The key is to constantly monitor and be flexible with your budget.

FINAL BUDGET COSTS

Be mindful of expenses that may linger until the end of a campaign. Your treasurer or compliance officer will need to file forms after the campaign is complete. You may have bills for the website host or domain. Some volunteers may have invoices that they did not submit in a timely manner. Make sure that you have a requisite amount of money ready to cover end-of-the-campaign expenses.

SESSION #8 - CHALLENGE

Put together a budget utilizing the principles outlined in this section. Remember to consider the size of your campaign, strength of your volunteers and capacity for fundraising.

Local District Campaign Budget - Template					
Item	Timeline	Count Quoted	Budgeted Cost	Essential	Pricing Notes
Filing Fees	<i>At filing</i>			<input type="checkbox"/>	Generally free for most school boards
Candidate Statement	<i>At filing</i>			<input type="checkbox"/>	Cost per voter in district
Website	<i>At filing</i>			<input type="checkbox"/>	Domain, host costs are usually set; maintain with volunteers, if possible
Treasurer	<i>First, last expense</i>			<input type="checkbox"/>	Hourly/retainer with associated transaction costs
Consulting Fees	<i>Usually monthly</i>			<input type="checkbox"/>	Limit paid consultants; keep retainer low, contract clear
Filing/Admin Total					
Walk Pieces	<i>Mid campaign (based on walkers recruited)</i>			<input type="checkbox"/>	Cost per piece
Yard Signs	<i>Mid campaign (based on weather & regulations)</i>			<input type="checkbox"/>	Cost per piece depends on size, material, colors, one/both sides, stakes
Literature Drop	<i>Late campaign</i>			<input type="checkbox"/>	Cost (piece printed + drop)
Data	<i>Beginning, throughout campaign</i>			<input type="checkbox"/>	Get free through party endorsement or pay voter's office, SoS for voter rolls
Ground Game Total					
Slate Card	<i>Early expense; possibly consider multiple slates; RSVP before opponents</i>			<input type="checkbox"/>	Cost per piece (generally 9/10 cents)
Slate Mail Total					
Mail Program Plan	<i>Last 2 weeks</i>			<input type="checkbox"/>	\$ per piece + print set up cost + postage + design cost
Mail Program Total					
Digital Program (Facebook Ads)	<i>Last 2 weeks</i>			<input type="checkbox"/>	\$ per ad placement
Digital Program Total					
Other	<i>Miscellaneous costs</i>			<input type="checkbox"/>	Travel, postage, phone calls, texting, subscriptions, snacks, waters, etc.
Campaign Total					



CLEO Candidate's Handbook

Session 9: Fundraising

INTRODUCTION

This session will assist the candidate in fundraising for your campaign. A comprehensive plan for fundraising is a critical aspect of your campaign. Asking other people and organizations for support may seem daunting at first but once you have a fundraising plan and understand some strategies the process becomes much easier.

In Section 3, you made a list of all of your supporters for your candidacy. This group of supporters will be your base for fundraising. You should reach out to your immediate circle of supporters for financial support in your candidacy, but to have a successful campaign, you will need to extend your fundraising beyond just your immediate circle of supporters.

FUNDRAISING STRATEGY

Below are the steps to follow in order to develop your fundraising strategy.

Set a Fundraising Goal – You need to first understand what it will take financially to run a competitive campaign and win. To evaluate what type of support you will need to raise you can create a budget of expenses, research what similar campaigns have cost through campaign finance reports, and seek advice from a political consultant.

Craft a Compelling Message – Develop a persuasive and compelling message that communicates your campaign's mission, values and goals. Clearly articulate why people should donate to your campaign and how their support will make a difference in your local community. Your message should convey why you are the candidate to not only vote for but who will overcome political challenges with resources from a broad electorate, especially those who will be impacted by your election, indirectly and directly.

Create a Database of Target Donors – Identify the individuals, groups and organizations that are likely to support your campaign. This includes friends, family, colleagues, local businesses, community organizations, political parties and potential endorsers. You may be able to purchase donor data from a vendor, local stakeholder, or a political party.

FUNDRAISING METHODS

Now that you have established a clear fundraising strategy you can begin to put your strategy into action. Depending on your starting campaign budget, you may be able to utilize all of these fundraising methods or only some of them.

Finance Committee – Develop a campaign finance committee, with a chair, composed of close and trusted friends and associates. Each member of this board should be willing to donate to your campaign financially and help find other opportunities to fundraise, especially as they invite their friends to support your candidacy.

Personal Budget – Determine how much you are willing to self-fund your campaign and make those boundaries known with your family, campaign finance committee and consultants.

Fundraising Consultant – A fundraiser can help you broaden your fundraising appeal, but may also cost you money. Unless you have a friend who is willing to take on the role of a fundraiser – like your campaign finance chair – you can hire someone who will usually charge a fee commensurate with what you expect to raise as well as a percentage of the funds raised. While they are responsible for finding new people, they will often want you to help with lists and make calls.

Website – Create a campaign website or landing page that provides information about your candidacy, your platform and a donation button.

Fundraising Events – Organize fundraising events to engage with potential donors and supporters. Consider hosting meet-and-greets, house parties, or town hall meetings where you can share your vision and interact with constituents. Fundraising events provide opportunities to build relationships and secure donations. They do not need to be formal events, you can bring coffee and donuts or desserts to a neighbor's home for a morning or evening meet-and-greet.

Slate and Direct Mail – Make sure to include information on how people can support your campaign.

Email campaigns – Develop an email fundraising campaign where you send regular updates, news and donation appeals to your email subscriber list. By segmenting your lists, you can tailor messages to specific donor groups.

Door Knocking – Go door-to-door and provide literature outlining who you are, why you are running for office, and a way for the recipient to give to your campaign.

Social Media & Digital Marketing – Make sure to include links to support your campaign in your all digital marketing and social media campaigns.

Business and Corporate Donations – Approach local businesses and associations for potential sponsorship or donations. Make sure to comply with California's campaign finance laws.

Phone-A-Thons – Organize a phone bank event where volunteers make phone calls to potential donors, introducing your campaign and asking for contributions. Provide callers with scripts and talking points to ensure a consistent message.

Local Media Outreach – Develop relationships with local journalists and media outlets to secure coverage for your campaign. Media exposure can increase visibility and potentially attract donations from individuals who resonate with your message.

Public Speaking Engagements – Secure speaking engagements at community events.

Always ask for financial support. Politics is hard and many people are thankful that men and women with character and integrity are willing to get into the arena, and they would like to support those who are willing to stand up in public. Having friends and neighbors contribute money also helps them take your campaign more seriously. Donor strength sends strong signals to opponents, the media and the public.

FUNDRAISING LAWS & PRACTICES TO BE MINDFUL OF

- While friends and family members will likely want to support your candidacy, jealously guard your relationships with them. Do not solicit them for funds in a way that suggests an obligation, or demeans or devalues your relationship with them in any way. If you are going to ask close friends and family for money, do so in a personable and respectful manner. This will reduce possible resentment during the difficult parts of a campaign.
- Be aware of campaign contribution limits and if they apply in your race. If there are limits, know how those limits apply for primary and general elections (if you have the potential of participating in both), in serial donations, or from various entities, such as a business account.
- Be above board in donations to your campaign. Do not encourage people to launder donations through family members.
- California state law prohibits acceptance of cash at \$100 and above. That includes serial donations. If someone wants to donate more, they must write a check or donate by credit card and provide the campaign with their name, address, and occupation (if they have one) as well as an employer. Those who are retired or who do not have jobs can note that information.

- Campaign laws do not allow for contributions from non-citizens. U.S. citizens 18 and over can donate to a campaign without being a registered voter, but as a candidate, you should encourage anyone who donates to make sure they are registered to vote in a timely manner.
- While it is appropriate to offer advertising opportunities or recognize donors at campaign events, be careful not to do so in exchange for their support. While donations to candidates are public knowledge over a certain threshold (in California, it is usually \$100), some organizations may not want to get additional attention for their donation beyond the regular disclosures you are required to regularly report, so be wise and discreet when sharing that information.

WRAP-UP

A well-crafted fundraising strategy is essential for a successful local campaign. By setting clear goals, you can build a solid foundation for your campaign's financial success. Remember to adapt your strategy as needed and always prioritize transparency and compliance. It is very important not to take any donations from anyone until you have set up a compliant campaign.

SESSION #9 – CHALLENGE

Develop a campaign fundraising strategy.

Who is on your Campaign Finance Committee?

- Chair
- Friends
- Influential thought leaders
- Politicos
- Others

Think about costs of the campaign:

- What was previously spent in this jurisdiction or other comparable races?
- Who will be the major financial players on both sides?
- What should a low-end, mid-range and high-dollar ask look like and who fits into which categories?
- Are there other campaigns with funds in their accounts for which they are trying to clear?
- Are you able to, or interested in, self-financing or loaning money to your campaign?

Do you have a:

- Candidate identification number?
- Bank account?
- Treasurer?
- Fundraiser?
- Online donation portal?
- Printed donor envelopes?
- Mailing address for checks sent?

Think about ways you are going to get the word out:

- Email, website
- Social media accounts
- Mailers
- Letters
- Commercials
- Telethons
- Texting
- Events
- Direct appeal



CLEO Candidate's Handbook

Conclusion

This handbook is meant to help you evaluate your suitability and readiness to be a political candidate and provide you with information and guidance before, during and after the campaign. Running for office requires a significant commitment of time, energy and resources. Ultimately, the decision to run should be based on a thorough self-assessment.

Your success will not only be a result of conducting thorough research, building a strong campaign team, managing complex campaign laws and regulations, crafting a compelling message, and engaging with supporters and potential donors, but reflecting on what you have learned. Are you prepared to take on the responsibilities of a candidate?

- **Motivation:** Are your reasons rooted in a genuine desire to serve the community and make a positive impact?
- **Qualifications:** Do you possess the necessary qualifications, skills and experiences for the position you are seeking? How can you leverage your strengths to contribute effectively?
- **Personal Commitment:** Are you prepared to commit the time, effort, and resources required for a successful campaign? Do you have a support system in place to help you navigate the challenges that may arise?
- **Sacrifices:** Are you willing to make personal sacrifices and put other aspects of your life on hold during the campaign period?
- **Resilience:** Can you handle the potential pressures, criticisms and setbacks that come with running for office? Are you prepared to maintain focus and positivity throughout the campaign?

By honestly evaluating your readiness based on these factors, you will gain clarity on whether you are prepared to run for office. Remember, it is perfectly acceptable to determine that now might not be the right time for you or that conditions might change in future election years.

Ultimately, the decision to run for office should be driven by a deep sense of purpose, a genuine desire to serve, and a strong belief in your ability to make a positive impact. Trust your instincts, consult with trusted advisors, and make a choice that aligns with your personal and professional goals.

Good luck on your campaign journey, and may your commitment to public service lead to a successful and fulfilling candidacy.



CLEO Candidate's Handbook

Exit Interview

Now that you have completed this course, you may schedule a short phone exit interview with the CLEO director via the certificate request button on the Candidate Academy course website to receive your certificate of completion. This credential from California Policy Center confirms your completion of the course which you can place on your resume, social media profiles (i.e. LinkedIn) or other personal biographies.

Below are some prompts to consider for your exit interview.

How has this training made you think differently about running for office?

What skills and organizational processes are necessary for a candidate to be successful?

If you decide to run for office, in what other ways can this training and CLEO assist you?

If you are not running for office, how can you use this training to help other friends and colleagues who are running for office?