

THE OBAMA CAMPAIGN: 10 LESSONS FOR CANADIAN POLITICIANS

Robin V. Sears and Joseph Lavoie

The Obama campaign for the presidency was historic in many ways, culminating in the election of an African American as the next president of the United States. Obama's biography was the personification of his movement of hope and change. He proved to be a compelling orator. But he also built a juggernaut that will be the model of future political campaigns. Robin Sears and Joseph Lavoie, devoted students of the political game, examine Obama's model of success and suggest 10 lessons for Canadian politicians.

La campagne de Barack Obama a été historique à maints égards, donnant lieu à l'élection du premier Afro-Américain à la présidence des États-Unis. La vie même de l'homme est l'incarnation du mouvement d'espoir et de changement qu'il a défini. Il s'est de plus révélé un orateur brillant. Mais il a aussi mis sur pied une machine électorale imparable qui servira d'exemple à toutes les prochaines campagnes. Robin Sears et Joseph Lavoie, observateurs assidus des rouages politiques, analysent le modèle Obama et en tirent 10 leçons pour les politiciens canadiens.



Lord, we ain't what we want to be; we ain't what we ought to be; we ain't what we gonna be, but, thank God, we ain't what we was.

Martin Luther King, quoting a former slave's prayer about redemption

The astonishing triumph of the Obama campaign is breathtaking: the largest victory for the Democratic Party in 40 years, the first successful non-southern Democrat since Kennedy, the recapture of significant parts of the South and Southwest for the first time in two generations, huge advances in support from Hispanics, Asians, and rural Americans, even a majority of white Christian evangelists under 40 won over by a young African-American junior senator.

Yet it is neither his oratory nor his charisma nor his vision that holds the most important lessons for political practitioners. The Obama team has set a new high-water mark on a wide variety of additional tests of campaign wizardry. Here, in no particular order, are 10 lessons that Canadian politicians of every stripe could learn from.

No incumbent is invulnerable. It is hard to exaggerate the odds that Obama overcame in winning the nomination; that was a much harder test than the general election. The Clintons' hold on the party was seen to be invincible as recently as one year ago. So the first lesson is that no matter

how well entrenched, powerfully protected or rich an established candidate is, in today's politics he or she is always vulnerable to a smart insurgent candidate.

By late in 2006, when David Axelrod and David Plouffe began planning the exploratory soundings and private party events to test the political waters, the Clinton campaign had been in development for nearly a year. The list of endorsements, and likely endorsements, from the Democratic Party's great and good was already very long.

But the list of strategic mistakes by the Clinton campaign is also long: ignoring caucuses in favour of primaries, front-loading expenditures and messaging with no post-Super Tuesday fuel or political ammunition in reserve, failing to develop a clear and accepted division of power and responsibility among the senior staff, and on and on.

But the error from which Clinton could not recover was the absence of a strong, believable campaign theme. Hillary's arced from an implicit message that she deserved the nomination, to a thinly veiled class/race appeal, to a claim that experience trumps oratory, to the final refuge of a message-free campaign: "Only I can win" — all with many stops in between.

In this as in so many other domains, the Obama campaign was locked on a powerful theme from day one, and the internal discipline that ensured it was never deviated from was nearly unbelievable — especially in the painful

weeks of the late spring when it appeared that the Clintons were clawing their way back.

The best story wins. Whenever I counselled younger colleagues about politics, I used to recall my father, Val Sears, hammering home the message that the only journalists who mattered were the best storytellers. His conviction applies equally to politicians, though few understand the power of

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the stronger narrative to overcome better organization, money and name recognition.

Obama's personal story, combined with his appeal to national citizenship in the cause of change, was undeniably powerful. That he was a great orator and a stunningly attractive black man, surrounded by a modern version of a Norman Rockwell family, made the package instantly compelling. His understanding of history, metaphor, symbol and timing was obvious from the first moments of his Springfield, Illinois, launch on a brilliantly sunny, frigid February morning.

Critics complained that the fact he gave a good speech was not policy or proof of leadership. They were wrong. For those who were interested, there were hundreds of pages of policy documentation at his website. For those impressed by endorsements, his early policy wonk endorsers were drawn from a surprisingly broad and deep range.

His proof of leadership was his conduct as a candidate, a high-risk claim, vulnerable daily to the devastation of even small gaffes. But his management of those campaign challenges, most famously his hapless preacher's rhetorical excesses, gave mounting proof of his abilities in the heat of battle.

The less said about Hillary Clinton's narrative the better. Suffice it to say her husband, her history and her undisguised chagrin at even being challenged would have undermined even a strong political theme — but she lacked even the most basic of compelling stories, beyond a desperate appeal to gender near the end.

John McCain's narrative might have been more effective if he had

understood that biography alone can never be an adequate counter to a competitor who meets that challenge and then trumps it with a powerful appeal to the hunger for national renewal. As an American taxi driver put it to me in cruelly acute vernacular: "It's tough that he had such a crappy time in that prison, but why does that make him a great president? Like, what is he going to do for me as a result? Most of us ain't been having such a great time either."

Stéphane Dion was an empty suit in the personal narrative stakes, until he began too late to use his *Clarity Act* credentials as proof of his political spurs. His political theme was a famously leaden balloon, even if painted green. Jack Layton used his family — and especially his delightful Chinese-Canadian mother-in-law — most effectively, but he failed to connect his biography to his message convincingly.

Stephen Harper hesitantly gave some colour and texture to his personal narrative in his opening statement's musing about fatherhood, and then with a weekend at his old high school in Toronto, but his story failed to be a comfortable part of his public face, or to be seamlessly connected to his message.

He had an opportunity to drape himself in the flag of office as the serious leader in a crisis, but seized the chance about a week too late.

Compare those dry narratives to the power and political connection of Obama's message about his mother and grandmother to the subject of race in America; or his fatherless childhood and its connection to his demand for parental responsibility, especially in black America; or even his young organizing battles on behalf of laid-off steelworkers on the South Side of Chicago as proof of his appeal to laid-off industrial workers today.

The best story by the best storyteller does win, especially in anxious political times.

No drama Obama. It is curious how obvious this lesson is, and yet how rarely it is observed. Military teachers hammer home to young recruits the military verity that strong commando units, seasoned and led by solid and respected leaders, can overwhelm much larger forces with apparent ease. Battle-scarred political strategists always warn their clients that large, chaotic, internally feuding campaign teams will lose to much smaller, better-led, more disciplined insurgent forces.

This was driven home not once but twice in the election cycle. The embarrassing feuding and backstabbing background briefings that brought the Clinton campaign to its knees in the spring were reprised by the McCain campaign in the fall. The impact on donors, volunteers and other candidates of days of media recycling of the internal disarray of a campaign in trouble is hard to overstate.

We don't yet know who was quietly kneecapped early in the Obama campaign for speaking out of turn, or for being seen to be placing their own status or reputation above the campaign. But the understanding that it was a hanging error to spin a reporter or any outsider with anything but "the message" was so well inculcated in the

opening rounds of the Obama campaign that — even as it ramped up to include several hundred, then several thousand and then tens of thousands of professionals and volunteers — the discipline held.

With all the pressure of a 24/7 news cycle, and a campaign involving thousands of first-time volunteers, this was an impressive achievement. Unlike the campaigns of each of the Canadian parties, this was an amazingly gaffe-free enterprise that lasted nearly 22 months!

We don't know yet how much of this previously unheard-of discipline and professionalism is a credit to the candidate or to his chief strategist, David Axelrod — probably both, in different respects, would be my guess. The contrast with the Dion campaign's internal backstabbers, skinny-dipping New Dems or loose-lipped Tory staffers could not be more blushing clear.

Discipline versus local autonomy. What made this message and public image discipline even more puzzling (and perhaps astonishing) to veterans was the degree to which this was also a self-organizing, amateur-led campaign at the local level in many places. As is examined below in some detail, the somewhat Stalinist central control appearance of the Obama campaign at the top was completely contradicted at the bottom. University students and retired factory workers found themselves running small offices full of volunteers, sometimes within weeks of clicking on the Obama website for the first time.

As technology has enhanced the ability of central campaigns to reach into local riding decision-making in real time, Canadian national campaigns have become increasingly the micromanagers of every aspect of local elections. From talking points to sign and leaflet design to polling and finance decisions, little is left to local

volunteers in a Canadian riding campaign in any of the national parties.

Perhaps not surprisingly, they are thus having a harder time than ever staffing local offices with volunteers. In a vicious circle driven by cost pressures, technological advances and rapidly shrinking pools of local workers, even voter contact is increasingly done from remote call centres by paid professionals.

The Obama campaign ran call centres, but its ground game was anchored in the good old-fashioned door-knocking of neighbour-to-neighbour canvassing. It was a face-to-face campaign strategy with huge

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differences from days of old: volunteers met each other on social networks, were trained in a combination of online and intense personal seminars and one-on-one instruction and were deployed with detailed voter profiles capturing issue, consumer and lifestyle preferences for every prospect.

This amazing fusion of tight central messaging and impromptu local organization is the secret sauce of the Obama campaign, and will be studied by querulous strategists and academics for years.

Every vote is worth fighting for. Some Canadian political activists like to complain about the increasing dis-

parity between the value of a vote in a swing riding and its relative meaninglessness in an unshakable one-party riding. Imagine how much more disenfranchised one would feel if one lived in one of the roughly 30 American states that traditionally played no role in determining the outcome of a presidential election! The impact of the Electoral College, in combination with what seemed to be hardening lines of partisanship in the 1980s and 1990s, meant that traditional presidential campaigns were fought in smaller and smaller numbers of battleground states.

The Obama campaign overturned that orthodoxy. Picking up on the determination of party chairman Howard Dean to fight in 50 states, the Obama campaign deliberately allocated scarce resources to so-called unwinnable red states from the early primaries on. The payoff was the surprise results in places like Indiana, North Carolina and Virginia — solidly Republican rotten boroughs for two generations.

The campaign recognized early on that there was an underlying logic to "wasting" scarce resources on hopeless states. First, with the power of the Internet, these new battlegrounds could be largely self-financing. Secondly, a methodology of distributed control meant that local leaders would be identified quickly, trained, and redeployed, increasing the campaign's reach very efficiently. Finally, in the general campaign the McCain campaign was totally undermined by finding itself fighting a rearguard action in formerly blue state redoubts, as well as trying to gain ground in the traditional battlegrounds of Ohio, Pennsylvania and Florida.

Canadian strategists might reflect on the new resources that the NDP won for the life of this parliament through raising its vote in dozens of ridings in Quebec, both in per-vote



CP Photo

America's new First Family is introduced to a wildly cheering crowd in Chicago's Grant Park on November 4. The Obama narrative, plus the current of change, were undeniable forces in the outcome of the presidential election.

subsidy and in riding rebates, though it lost badly in nearly every case. Simultaneously, the NDP and the Tories raised the number of competitive second-place finishes, laying new ground to challenge Liberal strongholds next time.

Fighting on the high road. The widening disconnect between the media preference for rough negative campaigning, mostly on television, and some voters' distaste for it reached chasm width in the Canadian election, with each party exceeding its own records for tastelessness, dishonesty and simply insulting messages. The winner, to this observer, was the NDP's Quebec TV campaign,

which tried to link fascist militarism, George Bush and Stephen Harper, with all the subtlety of a sledgehammer to the head.

But we are church mice by contrast with the increasingly Internet-led American attack campaigns. Obama "palled around with terrorists" and had been trained as a terrorist in an Indonesian madrassa. McCain was a "Manchurian candidate in the grip of Vietnamese communists" and had hidden his doctors' "two-year life expectancy" health reports. These and a dozen other equally improbable attacks appeared on websites in local TV ads and in surrogate and Sarah Palin speeches.

The Obama campaign's response to this new low in campaign foolishness was clever and elegant. Determined not to be Swiftboated, Axelrod signalled early in the primaries that if unfairly attacked, the campaign would hit back hard or even harder. Each salvo from the Clintons, whether through intermediaries recycling leaked rumours or in speeches or on television, was knocked back within minutes in email, in hours on the campaign's own websites and usually within 24 hours in a new TV ad, if the campaign felt it merited a broader counterattack.

Obama was very rarely involved in any of the countermeasures publicly,

dismissing the attacks merely as proof of desperation.

The Obama campaign's own negative ads were masterpieces of understatement — of disapproval by raised eyebrow. Perhaps the most devastating was a clip of a very deranged-looking Dick Cheney endorsing McCain in the final days, introduced by a super of Colin Powell's and Warren Buffett's endorsements of Obama. Nothing more needed to be said.

But the hidden firepower of the campaign was once again the Net. On fightthesmears.com, the campaign's own counterattack site, supporters were given a target to hit, a message to use and advice on the best websites, social networks and intermediaries to employ. A local assault on another outbreak of "Obama is a secret Muslim" could generate thousands of counter emails to reporters, activists and voters in minutes.

Interestingly, the campaign put a chill on the efforts of the supportive third parties, the so-called 527 organizations, once it had won the nomination. These are the quasi-independent (so they claim) campaign offshoots that escape spending limits, and can deliver nasty kidney punches with little risk to the reputation of the official campaign. The Swiftboat campaigners used a series of 527s to fund their smears. The equally harsh MoveOn.org and similar liberal groups' TV campaigns fell off the air almost entirely by the weeks before the two parties' conventions. It was judged to be a serious strategic error by some Democratic strategists, who saw it as proof of Obama's naiveté.

As the campaign developed and McCain several times had to apologize and demand the withdrawal of racist and anti-Muslim attacks on Obama by 527s supportive of the Republican campaign, it emerged that Obama's "naiveté" was in fact greater strategic insight. The McCain campaign wore the mud stains of

every below-the-belt attack; Obama had fewer apologies to make.

Political families. Some Canadians feel uncomfortable about the front-and-centre role that families play in American political campaigns. The sight of Cindy McCain, rictus smile frozen, standing perfectly still and ramrod straight night after night, was painful to watch. But the appropriate use of a candidate's partner, children, parents and siblings gives context and depth to citizens' understanding of the character and values of a candidate.

Obama's televisually perfect daughters were rarely allowed to perform or be grilled on their own. Their appearances on stage, occasionally greeting Dad's plane, and being seen to be smart, funny and the soul of decorum, conveyed a powerful message about the Obamas as parents and about Obama himself as a successful black father — both an image and a reality that undermined silently the effort to paint him as "not like us."

Michelle Obama became a stronger and more confident campaigner as the two-year endurance contest unfolded. Efforts to stain her patriotism or judgment by conserva-

n't count: she's a professional.) Lauren Harper is a smart, funny and attractive woman with strong political instincts. It is a mystery to many Conservatives why she does not play a more public role. Would an occasional anecdote about his children, or the sight of them together as a family, not have rounded some of the Harper edge?

Engaging surprising endorsements. The contrast between Obama's endorsements and those of his primary competitors was striking, despite the Clintons' deep Hollywood ties. But it was the strategic timing of Obama's announcements, the choice of the most surprising and high-impact personalities appropriate to the campaign challenge of the moment and the message that each delivered about him that caused political professionals everywhere to gasp in astonishment. Consider only four out of a dozen high-impact announcements.

Oprah came out for Obama early when he was facing attacks on two fronts: he wasn't really black enough, and it was a woman's turn. The icon of American women on television, black and white, needed to do nothing but turn up and smile to crush both

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tive bloggers were made to look bizarre by her confident, competent performance as mother-in-chief. Obama's allusions to the powerful women in his life — grandmother, mother and Michelle — were a subtle rebuke to Hillary's gender politics in the spring, and an even more compelling contrast to Sarah Barracuda in the fall.

Again, can you think of a single family member of a Canadian leader who even silently added any value to this past campaign? (Olivia Chow's elegant mix of partner and politician does-

attacks, but she then went on to give a powerfully moving testimonial to the man and his message.

Bill Richardson's brave endorsement trumped those of John Edwards and Ted Kennedy and other new political allies, because he also delivered a twofer. As a long-time public ally of the Clintons, his defection was a heavy blow at a moment when they claimed to be gaining momentum. As a Hispanic American, he slapped down the message that his community would never vote for a black candidate.

Colin Powell held his fire, or was encouraged to, until the one remaining arrow in the McCain quiver was an effort to revive the commander-in-chief attack. His searing eight-minute *Meet the Press* defence of America, its civic promise and Obama's singular claim to its highest title, followed by his shattering story of the mother of a dead Muslim-American soldier weeping at his grave, probably ended McCain's chances that Sunday morning.

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Can you name a single Canadian musician, writer, athlete, scientist or TV star whose endorsement of any party leader made any difference to anyone? Oh, there was one. Margaret Atwood endorsed the Greens and the Bloc...

Money and crowds. Never in the history of Canada or the United States has one candidate spoken face to face to so many voters, awoken so many volunteers to the joy of a campaign or seduced as much money from as many donors. These are connected achievements, and they have great relevance to Canada's enfeebled political parties.

Consider the difference between the elections in two countries that overlapped in time. Obama gathered 10 million email addresses, 3 million Facebook friends, more than 2 million volunteers, and more than 1.5 million donors. Granted, there is a great deal

of duplication in those statistics, as donors became volunteers, but consider the Canadian parallels.

No one has yet counted the number of people who attended Obama's massive rallies, but in the last three weeks he spoke to nearly a million Americans. Two rallies approached 100,000. No one in Canadian politics has spoken to a crowd larger than a few thousand since the end of the great rallies in the 1960s. Here the Canada/US ratios are less relevant, as we have seen crowds

nearly as large: the Pope and the Rolling Stones drew more than a quarter-million fans each.

Fewer than 25,000 Canadians worked on the 2006 election, according to post-election studies, and if turnout is any guide, the volunteer number will also likely have shrunk this time as well. Applying the usual Canada/US 1-to-10 rule, we are still 175,000 volunteers short on the Canadian centre-left alone!

The donor equation is even grimmer. Even with the Canada/US conversion of one-to-ten, all the donors to all Canadian political parties barely exceed Obama's total. When we consider the amounts, the comparisons become absurd. Total contributions to all Canadian candidates and parties are not likely to exceed \$30 million. That is less than 5 percent of Obama's total and less than 1 percent of total American contributions.

Now, it is entirely reasonable not to want the multi-billion-dollar expense of an American election imported here. But why would we not want hundreds of thousands of Canadians volunteering, cheering at rallies, truly engaged in our campaigns?

There are some clues in the final lesson of the Obama campaign about how to make that happen.

Obama's amazing digital Universe. This lesson is really the one that unites everything else. None of the crowds, the money or the ground organization would have been possible without Axelrod, Plouffe and Obama's early understanding that they could take the new tools of the digital world to a level never seen before in politics.

Obama has redefined the way online campaigns are run. For those who thought you needed only to be on today's hottest social networks to attract thousands of supporters, Obama proved that you need, in fact, to take it a step further — to give supporters the tools they need to grow your movement. He built a destination far more powerful

than the traditional top-down messaging site. He created a community organizing toolkit, his own social network, mybarackobama.com (MyBO), that transformed the campaign.

Republicans mocked Obama's experience as a community organizer, but those skills helped him understand digital organizing. He crafted a robust ground operation built on connecting the traditional street campaign with the tools of the Net.

Here are some breathtaking statistics about the power of this innovation:

- 1,000: The number of phone banks organized by volunteers using MyBO in the final week of the campaign.
- 150,000: The number of other campaign-related events organized on MyBO over the course of the campaign.
- 1 million: The number of phone calls supporters made using MyBO on election day alone.
- 35,000: The number of groups created by supporters on MyBO. These were clumped by geographic proximity and shared interests.

- 1.5 million: The number of MyBO accounts created by election day.
- \$650 million and counting: The amount of money Obama raised, more than half of it through his website.

Beyond his powerful oratory and charismatic appeal — not qualities easy for more prosaic leaders to acquire — the genius of his campaign that is transferable is the domination of the online universe he achieved, built on the anchor site: MyBO.

MyBO was developed with a set of tools that allowed organizers to meet online and then to organize the offline war for the early primaries. He was able to get more troops on the ground in small states, in a campaign then much smaller in financial and full-time staff resources, well before Clinton did.

He would win 11 contests in a row, and these early successes triggered a wave of online donations from a growing base of supporters. In the second quarter of 2007, he raised a third more than Clinton. By September this year, 3.1 million people had contributed an average of \$86 each — the vast majority responding to email requests and MyBO reminders.

MyBO, like Facebook, MySpace et al., allows you to find friends, start groups, organize events and have your own blog. But the Obama site did much more: each user had a dashboard indicating their activity level, reporting how many events they had hosted and attended, the number of calls they had made, how many doors knocked, blog posts written, groups joined and funds raised. In a clever bragging rights competition each user's "Activity Index" was displayed prominently on their profile page.

The genius of this virtual organization was its connection to the ground war. MyBO's objectives were first to create and feed an online community, and then, using that base, to accelerate fundraising. But Howard Dean and others had done that years before. Where

Obama set a new standard was in the system's ability to achieve higher campaign goals: to encourage people to organize their own events and voter contacts, and then to get those new activists to create, foster and grow their own new communities. No one had ever done this on a national scale before, anywhere.

MyBO was the hub of the network while other sites like Facebook and YouTube were the spokes. The campaign cast its net to Facebook users and reeled them in to MyBO. The cycle was to capture online supporters from any other location online or off, drive them to the site, get them to volunteer and recruit friends and then to repeat

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the process based on the day's message or campaign developments.

All destinations were equal with the exception of YouTube, which received special attention and feeding. In the Obama campaign in Wisconsin, for example, a three-person new media team fed YouTube with state-level material daily. A videographer shot and edited high-quality content, which was vetted by headquarters in Chicago and then posted almost daily.

TechPresident, an organization devoted to assessing the campaign's use of technology, monitored the value of YouTube to the candidates. The results are staggering. For Obama: 14.6 million hours of viewers' time. McCain received less than half a million hours.

The commercial value of Obama's YouTube time alone, estimated at \$46.8 million, was equivalent to about

one-third of McCain's and the GOP's entire TV budgets.

One tool that received little attention, but that was important to young voters, was text messaging. The Obama campaign understood that a large percentage of young voters no longer have landlines, and it collected mobile numbers in the millions. The decision to announce Joe Biden as Obama's running mate was ingenious — the campaign harvested hundreds of thousands of phone numbers of activists anxious to hear the news first.

Obama's website featured its blog prominently, but it was primarily used to reinforce the message and rarely went on the offensive. It featured supporters, discussed policy issues and kept them updated on upcoming events and campaign developments. With the campaign posting 10 to 20 posts a day, each one managed to get between 200 and 900 comments. After the victory, one post got more than 2,000 comments.

The Obama campaign used its separate site, fightthesmears.com, for counterattack. It debunked the latest attacks and encouraged supporters to send the truth out to all their friends. The campaign even created widgets — tiny programs that opened and operated automatically — that people could put on their blogs or social network profiles. The widgets broadcast the latest counter-viral message and brought people to the site.

Money can pay the rent, but it was MyBO that also filled the campaign offices with enthusiastic supporters. Online volunteer organizing essentially built the campaign structure in places where it didn't exist, letting paid staff parachute in and immediately take command of a working political army. Once the paid staffer was in town, he or she would use this army of supporters to knock on doors, make phone calls, recruit more volunteers and generate support.

