



Campaign Tech Service Guide

By Matthew Wiegmann

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About Texas Progress Tech

TPT is a volunteer organization based out of North Texas which aims to connect individuals with technical skills to support county, state, and national campaigns.

About the Author

Matthew Wiegmann has been working in technology roles for over 22 years and has worked in private, educational, political, and governmental sectors. Matthew was previously the Director of IT and Cybersecurity on President Biden's 2020 campaign and a Senior Advisor of Technology for Secretary Yellen at the US Treasury in 2022.



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Summary

Modern campaigns require a wide range of skills, often with limited resources. As a result, candidates and campaign staff must frequently build custom solutions without the benefit of a clear playbook or guide. Most campaigns need to set up:

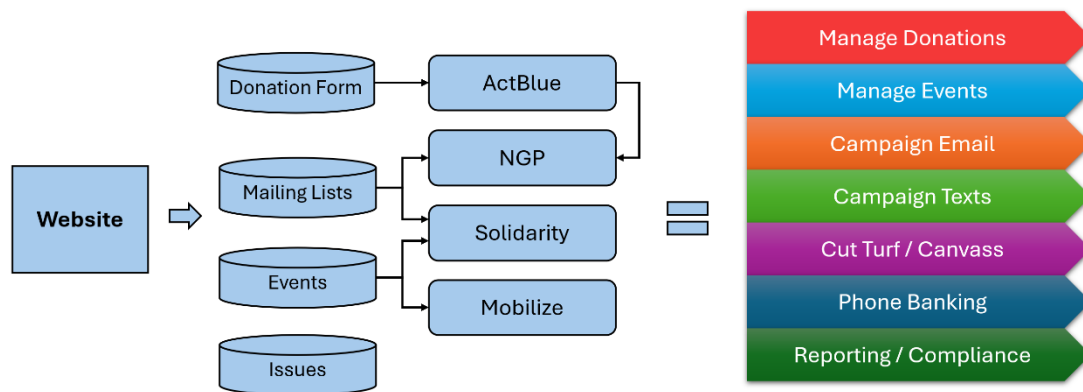
- Websites
- Donation capabilities
- Volunteer & Voter information collection
- Event management and outreach tooling
- General staff communication tools
- External marketing communication (email & text)
- Canvassing and turf cutting assignments
- Phone banking

This guide seeks to provide simple and clear examples of the different services which can be provided to help campaigns win. This information is meant to inspire ideas for potential support but is not meant to be limiting. If you have a question or idea not mentioned in this document, please reach out and we would love to have a chat!

Common Campaign Architecture

Traditional campaign architecture generally starts with an effective website which can drive data forward to unlock new capabilities. For very low cost, campaigns can partner with Democratically aligned tools and the County/State Party to transform their data into powerful people powered operations.

A simplified version of this architecture often looks like:



Campaign technology should help enable your campaign to better connect with your volunteers, voters, and donors. By utilizing common tooling, you both benefit from access to national data sets as well as the ability to align your operations with other local campaigns. This helps campaigns to reduce duplicating efforts among the same group of voters, which makes your emailing, call/texting, and door knocking efforts much more effective!

1.0 Campaign Systems Support

Even with limited staff and budgets, campaigns have access to a wide range of affordable and easy-to-use tools that can support large-scale operations. While many of these platforms are simple to adopt at a basic level, a deeper understanding can unlock much more of their value.

Every campaign has different technology needs and different priorities. In an introductory call, we can:

- Conduct review of current tool usage
- Architect and plan longer-term goals for growth
- Evaluate new tools before purchase
- Assist with tool setup and rollout
- Conduct cyber security reviews
- Provide written training and guidance on best practices

Let's connect and find what works best for you!

Procurement

Purchasing hardware and software for campaigns can be complex and at times feel cost prohibitive. Additionally, campaign finance law regulations can be complicated to navigate. We can help to ensure all resources are properly acquired and accounted for. By working with a technologist experienced in navigating these vendor ecosystems you can ensure you get the best prices for your tools. Many companies have discounts and programs exclusively for campaigns that make expensive tools much more cost effective.

Setup & Consulting on Common Campaign Systems

We can help set up, train staff, and roll out common campaign tools. The following are commonly utilized tools popular with campaigns both small and large.

Operational Tooling

- Google Workspace
- Microsoft 365
- Asana/Jira/Monday PM Tools

CRM / Campaign Tools

- NGP
- Solidarity
- Nation Builder

Communication Tooling

- Slack
- Signal
- Email
- Mailchimp/Constant Contact
- Hustle
- Action Network
- Mobilize

Fundraising Tools

- ActBlue
- Anedot
- Stripe

We can also assist with phone banking, digital advertising, social media and many more tools. Reach out on the [contact form](#) for more information.

Guides & Educational Material

In conversations with campaigns, we often hear that staff spend significant time answering recurring questions and helping volunteers learn how to use available technology. To reduce that burden, we can develop runbooks, written guidance, video walkthroughs, and other training materials. Let's talk about the most common questions and pain points you're seeing so we can build a library of clear, easy-to-follow resources.

2.0 Websites

Website platforms have become increasingly accessible, driven by the rise of all-in-one hosting solutions and automated design tools. While these platforms offer convenience, they can also be rigid and impose limitations. This results in websites which are not deployed in a way that maximizes your priorities, and which limits the reach of your message.

The following offerings are available to help with your web design, structure, and security:

Usability Review and Recommendations

After a brief conversation about goals, we will review your website's design, structure, and overall user experience. Based on your priorities, we will provide a short report with practical recommendations to help your website better support campaign objectives.

Common website mistakes or missed opportunities:

- Lack of photos or easily engaging content
- Overloading "Wall of Text" or typography that is hard to read
- Donation options misplaced, difficult to find, or less 'user friendly'
- Webforms not integrated with assistive tooling
- Websites not designed for bilingual assistance
- Aged information or details from the primary election remaining on the site
- Sites missing required disclaimer – "Paid for by..."

Additional website assistance which can be challenging for campaigns:

1. Reviewing DKIM/SPF/DNS records to ensure your website and email address are secure from spoofing or imitations.
2. Reviewing website service costs and making recommendations for more cost-effective opportunities.
3. Reviewing Search Engine Optimization to ensure your website lands at the top of voter's search options.

Security Assessment

Considering the standardization on a few very commonly utilized web services (i.e. WordPress / Squarespace), it has become easier for malicious individuals to use simple and free tools to try and attack your infrastructure. To complete a website security assessment, we would first run a series of tests and provide a short report summarizing the results. We would then schedule a 30–45-minute meeting with a campaign team member who has administrative access to your website systems. During the screenshare, we would review key settings together and confirm that cybersecurity best practices are in place.

Some examples of common best practices:

1. Have you obscured the admin panel for your website or is it available by visiting yourwebsite.com/login ?
2. Have all your administrators implemented Multifactor / 2FA protections?
3. Are all website addons and plugins frequently updated?

Design & Setup Hosting

For campaigns that do not already have a website, or want to consider starting from scratch, we can work with your team to understand your top objectives and budget to help design a site that best suits you. After an initial call, we would put together a recommendation proposal, and once approved, work with your staff to help get the site built and launched. The goal is to establish a site that can be easily maintained by the campaign to ensure future edits are simple and quick to implement.

3.0 AI Practices and Policy

AI capabilities are rapidly changing how staff, volunteers, and voters operate and it is critical for Democratic organizations to stay up to date on ethical AI opportunities. However, with the landscape changing so quickly it can be challenging to know where to even start in understanding what is available or possible.

A fantastic starting point for understanding the Democratic AI ecosystem can be found at the Higher Ground Labs [AI Resource Center](#).

Introduction to AI Tools and Uses

At a time where public sentiment on AI and AI Data Centers is at incredible lows, it is critical that campaigns do not take a 'head in the sands' approach to understanding the impact of AI. All campaigns should be prepared to respond to opponents' unethical use of AI technology as well as making well informed decisions about how ethical AI can accelerate campaign objectives.

Establishing Campaign AI Usage Policy

By working with TPT we can help educate and train campaigns on new and developing tools, and help campaigns develop their own AI Usage Policy to ensure all individuals working with a campaign have clear guidelines and understandings for the proper use of tools.

4.0 Research and Information

Keeping up with a rapidly changing technology landscape can be difficult for any individual. Therefore, it is important for candidates to develop a clear understanding of how technology is shaping the workforce, the economy, and every aspect of modern life. By drawing on national networks of technology professionals, we can help provide candidates with the resources and information they need to answer questions from constituents with confidence.

If there is a specific technology topic or recurring question you would like to explore in more depth, we can support you in several ways:

1. Compiling a list of topics that are relevant and tailored to the candidate's race.
2. Completing research and providing evidence-based examples and references.
3. Assisting with speech writing and providing language assistance to ensure technology topics are accurately represented.

How to Get Support?

Response times may vary based on the quantity and complexity of requests received. We aim to respond to all initial inquiries within 24 hours Mon–Fri and will provide additional details as to the scope and timeline possible for any request.

Options:

1. Send an email to info@texasprogresstech.com
 - a. Please include:
 - Your name
 - Campaign
 - Best contact method
 - Description of what services you are interested in
2. 1:1 Online meeting – [Link to request meeting](#)
3. In-Person Meeting – email for request

Disclaimer

All services mentioned above are offered on a completely volunteer basis and are therefore not considered a reportable in-kind donation as long as no expenses are being provided for service. We are not lobbyists or representatives of any company. Texas Progress Tech operates in accordance with Texas and Federal Election Law. (Reference [Tx Election Code Chapter 254 Sec 254.033](#) and [Texas Ethics Advisory Opinion No. 49](#)) Any costs for the procurement of new systems or a cost change to existing systems would need to be paid for by campaign staff. Should any change or recommendation result in a potential expense, we will note the suggestion and recommend a cost-efficient solution within a summary report.