



# First Shift Checklist

Give every new volunteer a clear, safe, and welcoming first campaign experience.

|                  |  |
|------------------|--|
| Campaign         |  |
| Owner            |  |
| Date / milestone |  |
| Review date      |  |

## Purpose and operating standard

Use for onboarding before, during, and after a volunteer's first action.

**Use verified information, assign a named owner, protect personal data, and confirm jurisdiction-specific legal or election requirements with the authorized campaign official or election authority.**

## Before arrival

| Item                                   | Complete                 |
|----------------------------------------|--------------------------|
| Contact details and role recorded      | <input type="checkbox"/> |
| Exact location/time/lead sent          | <input type="checkbox"/> |
| Accessibility or accommodation checked | <input type="checkbox"/> |
| Reminder sent                          | <input type="checkbox"/> |
| Lead knows this is a first shift       | <input type="checkbox"/> |

## At launch

| Item                              | Complete                 |
|-----------------------------------|--------------------------|
| Warm welcome and introductions    | <input type="checkbox"/> |
| Explain campaign objective        | <input type="checkbox"/> |
| Demonstrate task and script       | <input type="checkbox"/> |
| Confirm safety/privacy/escalation | <input type="checkbox"/> |
| Pair or support appropriately     | <input type="checkbox"/> |

## After shift



| Item                           | Complete / notes |
|--------------------------------|------------------|
| Thank specifically             |                  |
| Ask what worked or was unclear |                  |
| Record interests and strengths |                  |
| Offer one clear next action    |                  |
| Send follow-up within 24 hours |                  |



## Sources and local adaptation

Confirm all election, finance, accessibility, privacy, and voting-information requirements using current official sources. Record the source and verification date before operational use.

**Elections Canada - candidate and political financing guidance**  
<https://www.elections.ca/>

**U.S. Federal Election Commission - candidate and committee guidance**  
<https://www.fec.gov/help-candidates-and-committees/>

**National Democratic Institute - Campaign Skills Handbook**  
[https://www.ndi.org/sites/default/files/Campaign%20Skills%20Handbook\\_EN.pdf](https://www.ndi.org/sites/default/files/Campaign%20Skills%20Handbook_EN.pdf)

**CISA - election security resources**  
<https://www.cisa.gov/topics/election-security/election-security-resource-library>