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**Golden-Winged Warbler**

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Campaign Advocacy Manual

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BY:
Talya Tavor
Jaime Sigaran
Maddox Wolfe
Claire Douglass
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WELCOME TO YOUR FIELD GUIDE FOR CHANGE

AUDUBON CAMPAIGN
ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler
Introduction

ACKNOWLEDGEMENTS

This manual draws from the professional experience of the authors, as well as the work of several organizations, existing campaign manuals, and resource libraries. This manual has greatly benefited from the work and guidance of Climate Advocacy Labs, The Midwest Academy, Marshall Ganz, Spitfire Strategies, RE-AMP, and Center for Story-Based Strategy. We have many others to thank here, as this project was a true community effort. To our first readers and editors, who helped us find the right voice, to our incredible team of interns, and to our colleagues across Audubon who supported this project at every step; thank you.

WELCOME

If you picked up this manual, chances are you’ve thought about joining an advocacy cause before. Maybe you’ve thought: “I want to make a difference, but I don’t know how.” Or: “I’m just one person. No one will care what I have to say.” Or maybe, this is your first time hearing about advocacy. This manual will give you the tools to transform those feelings into power and change. The Audubon Campaigns team drew from decades of experience as campaigners and community organizers to share best practices and hard-won lessons. This manual will help you identify your strengths and develop a plan of action to get you from wherever you are now to your vision for a better world. Realizing that victory for the long-term requires running campaigns with strategic focus. It means training grassroots leaders and building relationships that will serve your goals beyond the first campaign. It demands that people with shared interests band together to realize our vision of the future, to reclaim it from special interests, and create a better world for birds and people. We need to be bold and answer with grit, generosity, and action—together.
The National Audubon Society was founded in 1905 when thousands of people banded together to respond to the feather trade, which slaughtered birds wholesale and drove some species to the brink of extinction. We have had many victories that have propelled us to this point in time—whether it was passing the strongest bird law in the country, the Migratory Bird Treaty Act (MBTA), or helping to pass a bill in Arkansas that allows more access to solar energy; at every point—it was people like you who helped us get here. Now we must continue to build off our successes—and to learn from our mistakes—to be smarter, bigger, and make more meaningful change for birds and people.

We know that the change birds need will come from you, the millions of people across this country that call themselves Audubon members. Whether you’re a chapter member, Audubon Ambassador, campus activist, volunteer, or work for one of our state offices, you are part of a nationwide conservation movement.

We encourage you not to skip ahead as you work your way through this manual as each section builds on the next. That being said, we’ve created an appendix with a glossary and worksheets to help you along the way.

AUDUBON’S VISION
Our vision is simple: We believe in a future where people and birds can thrive. We believe that with this guide, we can build off the incredible intelligence and interest already present, and be bolder in our work.

In 2015, Audubon wrote a five-year strategic plan to achieve this vision and established four pillars describing how to realize it.

FOUR PILLARS FOR CHANGE

1. Durable Public Will
   Building political power and getting someone in power to consistently do something that they otherwise would not have done.

2. Science
   Working to build Audubon’s authority as a science-based organization and to inform and evaluate the work of others.

3. Conservation
   Protecting birds during every point of their lifecycles throughout the Western Hemisphere.

4. Network
   Building capacity, diversity, and connectedness across all levels of Audubon.

By focusing on our strengths and on the most important issues to birds and the places they need, we can create a thriving future for us all. We have seen it work firsthand. We know that with this manual, we can support Audubon members like you—whether you’ve been with us for decades, are new to bird conservation, or are somewhere in between. No matter where you come from, we know that you will play a significant role in changing the future for birds, and we will help you get there.
AUDUBON CONSERVATION PRIORITIES

Audubon has focused on five conservation priorities that we believe are the biggest threats to birds, where we aspire to take on the biggest issues and make the biggest difference.

These priorities are:

1. Climate
   Leveraging climate science and demanding change by tapping into people’s passion for birds.

2. Coasts
   Protecting and restoring coastlines by targeting the most important breeding, stopover, and wintering sites in each flyway.

3. Water
   Engaging the public on issues surrounding water rights and water quality.

4. Working Lands
   Collaborating with landowners and private industry to increase the quality of habitat on private lands to benefit 20 flagship bird species.

5. Bird-Friendly Communities
   Providing tools to make all communities safe for birds.

ON EQUITY, DIVERSITY, AND INCLUSION

There are tried-and-true best practices for running campaigns that are welcoming to all people.

When you’re running a campaign, ask yourself:

1. Am I reaching out to new people?
   Campaigns are a great way to get to know your neighbors and your community. Your campaign becomes stronger by bringing unlikely allies together for common goals.

2. Am I always being truthful?
   Campaigns are about mutual trust, respect, and reliance. We take action together because we are stronger together; maintain that trust by always being honest, even when it’s hard.

3. Who makes decisions in my group of advocates?
   Make sure that everyone in your group has a seat at the table to help make decisions. Everyone in, nobody out.

4. Am I willing to go outside my comfort zone?
   Everyone’s comfort zone is different. Sometimes, campaigns challenge us in ways that feel uncomfortable, whether that’s working with new people, changing how you relate to others, or receiving criticism on something you thought wasn’t an issue. These uncomfortable areas are where growth happens! Knowing when to say, “I’m sorry, I’ll do better next time”, or when to be open to a new experience will make you a stronger campaigner.

5. Is my campaign a place where people can make mistakes and learn from them?
   As we explored above, everyone makes mistakes. Allowing your fellow advocates to make mistakes and have the opportunity to learn and grow from them is how you build a campaign that wins for the long haul.
OVERVIEW OF THIS MANUAL

CHAPTER 1

In Chapter 1, we will cover the foundational building blocks of Audubon’s organizing framework: our theory of change, our vision and values, and the fundamentals of power.

CHAPTER 2

In Chapter 2, we will connect the dots. We will focus on building a campaign in the right order: First set goals, and then build out your vision. Afterwards, we will create a winning strategy, and ultimately launch the campaign.

CHAPTER 3

In Chapter 3, we will focus on building your team. A campaign is stronger and more durable if it is won with a community. We will prove that bringing people together is easier, and more important, than it seems through a step-by-step process, beginning with effective storytelling.

CHAPTER 4

In Chapter 4, we will shift to cover individual actions, or tactics, and ways to demonstrate your power. Tactics should always come last when planning a campaign, as these actions should be rooted in your vision, goals, strategy, and plan. We encourage you to work through all of the prior chapters, instead of skipping ahead.
CHAPTER 1

INTRODUCTION TO AUDUBON ADVOCACY

AUDUBON CAMPAIGN ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird
OUR VALUES

Before we dive into the details of a campaign, we need to know what brings us together. Likely, we’re here because we share a love of birds. But what else brings us together? Audubon is a unique organization in that we truly represent a diverse and multi-partisan population of individuals. Knowing what binds us will be critical to our work down the line.

After establishing common ground, we need to share an understanding of what we are here to do: run and win an issue campaign. A campaign is a series of tactical actions, guided by a strategic plan, enacted over a named period of time, with a clearly defined victory or end point.

Do you have any values that you want to add? List them here and write out what they mean to you.

photo by: Luke Franke/Audubon
OUR THEORY OF CHANGE

A “theory of change” is how and why we think we're going to win. Broadly, we believe that the Audubon network is large and distributed enough that we can shape local, state, and national conservation policy by combining staff skillsets and resources with our members’ expertise, passion, and desire to build power for birds.

Our basic strategic assumption is that we have the people, we have the resources, we have the vision, and we are stronger together than we are alone. If not us, then who? If not now, then when? For additional Theory of Change guidance, see Appendix A & B.

For example:

1. I want to help my city transition to 100 percent renewable energy.
2. I will work with the mayor and city council to introduce the resolution, and then build public support to demonstrate its necessity.
3. I think it will work because the city council has previously cared about the environment. Likewise, I know that one of the biggest issues in my city is the long-term health of our land and future generations—people get really fired up about it. I know they’ll come together to take on this issue.

Photography by: Lauren McCullough

Try writing out your own theory of change. Focus on these three questions:

1. What change do you want to effect?
2. How will you do it?
3. Why do you think it will work?

YOUR THEORY OF CHANGE

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CAMPAIGN VISION

It’s easy to feel burned out by the news. The problems feel so big and enduring, and the players so powerful. It can be easy to be cynical and think, “That’s just the way things are.” But what if that weren’t true? What new possibilities for the future open up when we realize we have the power to change business as usual if we work together?

This isn’t the first time that people have organized against powerful forces that seemed uncontrollable. Corporations once faced zero consequences for pumping pollutants into rivers and the air. It wasn’t until a massive movement that demanded national environmental laws which lead to the Clean Water Act, the Clean Air Act, and the creation of the U.S. Environmental Protection Agency.

Creating enduring change isn’t easy. Passing those laws took years of relentless work and activists endured losses along the way. Doing the work requires grit, hope, and the ability to see beyond today’s roadblocks to the victory waiting tomorrow. It demands a vision to illustrate the world that you want to live in. A vision avoids negatives like, “We can’t survive in a world with climate change,” and towards forward thinking: “We will live in a world with clean air, and healthy communities.”

Audubon’s vision is that ordinary people have the power to make decisions about their future and that of birds. We will have an active role and voice in decision-making, holding elected officials accountable at every level. Our vision is the first step in our theory of change.

A vision will illustrate the world you want to live in.

What is your vision?
Is it specific to your community? Write it out here:

YOUR VISION

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POWER

Power is a term thrown around when talking about creating change. But what does it mean in this context? Why is it so important to define? How does knowing about power help us win? Power is the ability to get someone to do something they otherwise wouldn’t do.

The key to building and demonstrating your power is learning how decisions are made, who makes the decisions, what you need to change the decisions, and how to make a plan.

BUILDING POWER

Power comes from either organized people or organized money (money from PACs, special interests, etc.): either you have a lot of people on your side or you have a lot of money; though you can, and should try, to have both. Grassroots organizing tries to organize the power of people against the power of organized money. Think about Audubon’s early efforts to push decision makers in support of the Migratory Bird Treaty Act (MBTA). We built a powerful campaign that demonstrated to our elected officials that thousands of individuals across the country care passionately about the issue. Our theory of change here was: if we can show up in bigger, louder numbers than our opposition, if we boycott and hit our opposition where it hurts, we can convince our elected officials to vote for the MBTA.

Today, the law has saved millions, if not billions, of birds each year. In order to combat the interests and lobbyists of energy companies, you must either: deprive your decision maker of something they want, give the opposition something it wants, or elect someone who supports your issue. But most of us don’t come pre-packaged with the ability to do these things. How do we build it? When do we know that we have enough? Building power can be challenging. From experience, we know that these steps will help you get the power you need, to win on the issue you’ve identified.

BUILDING POWER: THE FIVE STEP PROCESS

1. **Your Goal**
   Figure out what you want.

2. **Your Allies**
   Figure out who you want to work with to achieve your goal (chapter, center, friends, family).

3. **Your Target**
   Find out who has the power to give you what you want.

4. **Power-Mapping**
   Research to find out what influences your target, who your allies are, and where your strengths lie.

5. **Create a Campaign Plan**
   Create a campaign plan, including deadlines and numeric metric goals, to actualize your goal. These measures will help you track your progress towards your goal.

We’ll go over these steps in detail in Chapter 2.
Audubon focuses on issue-based campaigns. However, that’s not your only option when it comes to making a difference. See below for different types of campaigns.

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<tr>
<th>FORMS OF POWER</th>
<th>WHAT MATTERS</th>
<th>CAMPAIGN TYPE</th>
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<tr>
<td>LEGISLATIVE (BALLOT)</td>
<td>YOUR ABILITY TO IMPACT VOTERS ON AN ISSUE</td>
<td>ISSUE CAMPAIGN</td>
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<tr>
<td>CONSUMER</td>
<td>YOUR ABILITY TO AFFECT PROFITS</td>
<td>CORPORATE</td>
</tr>
<tr>
<td>LEGAL OR REGULATORY</td>
<td>YOUR ABILITY TO ENFORCE LAWS</td>
<td>LEGAL</td>
</tr>
<tr>
<td>DISRUPTIVE</td>
<td>YOUR ABILITY TO STOP AN INSTITUTION FROM WORKING</td>
<td>DISRUPTIVE</td>
</tr>
<tr>
<td>ELECTORAL</td>
<td>YOUR ABILITY TO GET THE ELECTORATE TO VOTE FOR YOUR CANDIDATE</td>
<td>POLITICAL</td>
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*chart adapted from: Midwest Academy*
CHAPTER 1

INFLUENCE VS. POWER

What is the difference between influence and power? Influence is persuasive. If you have influence, you are able to persuade your decision maker to do something. Influence is dependent on cooperation; it only works when it is accepted voluntarily by the decision maker, which makes you subject to their whims.

Power is more dynamic. Depending upon the type of power that you hold, you could have more control over a situation’s outcome than with influence. Let’s walk through the different types of power. Ultimately, you must figure out what is the type of power you need to get someone to do something they otherwise wouldn’t do.

TYPES OF POWER

There are three types of power: visible, hidden, and invisible. All three are present in every situation you are working in as an advocate. When you are strategizing about how to influence a decision maker, think through the visible, hidden, and invisible power.
1. Visible
Visible power is what we think of as traditional decision-making bodies, structures, and processes like voting and elections, Congress, city councils, board votes, or state legislatures. We can clearly see how the process works, who makes decisions, and how the decisions are made. Because the decision-making is visible, you can hold decision makers accountable to their votes and the outcomes. Visible power has the most public input. Tactics for visible power generally look like community advocacy and office meetings, testimony, voter registration, and petitions.

2. Hidden
This is the decision-making that gets done by people who already have power, and is not visible or accountable to the general public or people not in power. Rules, regulations, laws, and procedures get used by people in power to keep certain topics off of the table, keep certain types of people (generally people who don’t have structural power) out of the room and out of the decision-making process, or to discredit people who are challenging the status quo. Hidden power looks like professional corporate lobbyists, politicians giving special access and time to large donors, or important meetings that the general public isn’t able to attend.

3. Invisible
Invisible power is about our belief systems. It’s referred to as “consciousness” and “common sense” and describes unspoken rules in society. Have you ever heard someone talking too loud in a public space and gotten annoyed? They infringed on an invisible rule. Have you ever felt uncomfortable when you’re in an elevator with someone who is not facing the elevator door? This is another invisible rule.

HERE’S AN EXAMPLE
Of using all three levels of power in one advocacy situation: We need Mayor Rothschild to vote yes on this pro-public lands bill.

1. Visible
The vote is going to the city council. I need at least four city councilmembers to vote yes; my team can hold constituent meetings with at least four of the seven total councilmembers, a majority. We can also rally our neighbors to provide testimony in support of the bill during the public hearing this Thursday. We’ll need at least twelve neighbors to testify, three constituents for each targeted councilmember.

2. Hidden
I did my research and found out that Mayor Rothschild’s biggest donor is a company that wants to mine public land. I bet they have a lobbyist that met with him. I think we can overcome that with an op-ed about the issue in their local newspaper. Mayor Rothschild likes to be seen as pro-environment, and her constituents are highly favorable of this bill, so these tactics seem appropriate to get her to vote our way.

3. Invisible
The only people who have provided testimony for this bill are white, retired, and wealthy. Why is that? Why did the mayor invite the mining company’s public relations staff to speak, but not any local environmental groups? We need to hold our own town hall to tell our counter-narrative so we can hear from the people who were excluded.

photo by: Luke Franke/Audubon
THINGS THAT ARE NOT POWER (BEWARE!):

• Being right.
• Having the moral high ground.
• Having good information, the best science, and polished documents.
• Speaking for large numbers of people.

These are all important capabilities, but they don’t always translate to direct, sustained pressure on the appropriate decision maker. You can’t win on these capabilities alone.

SUMMARY

Knowing that the road ahead on any campaign is filled with challenges—seen and unforeseen—so we need to think through all the elements that bring us together, and make us stronger, before we dive into action. Our opposition is powerful, ruthless, and often has significantly more money than we do. We need to be smarter and more strategic, and we need to build community in order to win. We cannot be a random group of people getting together to phonebank once in awhile. We need to be a community of people rooted in shared values, a clear vision for a better world, and a theory for how to get there.

photo by:
National Audubon Society
HOW TO LAUNCH A CAMPAIGN

AUDUBON CAMPAIGN ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird, Florida Scrub-Jay
INTRODUCTION & OVERVIEW

To make a difference that stands the test of time, even when political winds change direction, you’ll need to build and sustain your power for the long haul. That means running strategic and focused campaigns that continually expand your base of support and build a culture and reputation of winning.

How you run your campaign will determine your power, effectiveness, capacity to recruit and sustain volunteers, and ability to create enduring support for your goals. At Audubon, issue-based campaigns should be volunteer-focused, creative, and bring people together for the greatest possible impact.

In this chapter, you’ll learn to write a campaign plan as we build on the advocacy and campaign fundamentals from Chapter 1.

Section 1
Provides insight on how to communicate and connect your vision with a conservation outcome and create the change you want. Finding out who your friends are, how many people oppose your idea, and when to strategically deliver on tactics are parts of the planning process.

Section 2
Describes our guiding principles and introduces our campaign strategy chart that will support your vision.

Section 3
Provides an overview of our methodology and shares best practices on how to think through the campaign process as it takes shape.

Section 4
Illustrates how to draft a strong campaign message, which will be critical to your success.

The more solid your planning and research, the higher your chance of success. We have trained many volunteers, chapter leaders, and state office staff, and have found that the success of your campaign depends upon how well you translate your vision to a campaign plan.

The campaign strategy chart included in this chapter is a field-and time-tested tool for structuring and organizing a campaign plan. The chart we use is based off the one created by the Midwest Academy, the premier national advocacy training organization. Whether you’re looking to target a legislator to endorse a bill, move a CEO to change their business practices, or encourage a federal agency to permanently protect an important bird area, it is how and when you do things that will determine your success.
A vision is your most important tool. A vision is a clear statement describing the future that you want to live in and are working to create. Think of it as a North Star that guides your campaigns.

Don't be afraid to say what's in your heart with your vision statement. You may be surprised to find that the bolder and more honest you are, the more likely it is that people will join and stick with you because they also share your vision. Sometimes, all it takes is one person to speak up.

A vision is a tool that:

- **Inspires action**
  - Draws people in and encourages new ideas.

- **Creates a plan**
  - Guides planning and sets goals to make decisions.

- **Keeps groups organized**
  - Commits groups to working together to achieve a goal.

At the core of each of our campaigns is a vision we want to achieve for birds and people. Your vision should be crystal clear and positive; it articulates what you want and believe in, not what you oppose.

For example, Audubon’s climate campaigns are not explicitly against the fossil fuel industry, but rather we are FOR properly sited, clean energy. Framing your vision as a proactive message reinforces its clarity and connection.

Another way we can successfully communicate a vision is by saying, “We believe that expanding solar power will create a safe and livable world for birds and people.” OR “We believe that having all of our city’s electricity sourced from clean, renewable technologies will help other places do the same.” OR “We believe that by growing native plants, we can create thriving communities for birds.”

Clear, bold, and honest vision statements set you up to be an effective communicator because they show right out of the gate what you’re working towards and what you believe in. Now that you’ve created one, let’s go over fundamentals of campaign planning that illustrate how to win.

**photo by:**
Luke Franke/Audubon
FUNDAMENTALS OF EFFECTIVE AND WINNING CAMPAIGNS

WHAT IS A CAMPAIGN AND HOW DOES IT WORK?

In this section, we’ll look under the hood of a campaign to see what building power looks like in practice.

A campaign is a series of tactical actions, guided by a strategic plan, enacted over a named period of time with a clearly defined victory or end point.

A WINNING CAMPAIGN CONTAINS THE FOLLOWING:

1. **GOALS**
   A clear articulation of what you want.

2. **TARGETS**
   Decision makers who have power over whether your goal is met or not.

3. **STRATEGY**
   A statement that describes your big-picture plan to win.

4. **TACTICS**
   The smaller actions you take to implement your strategy. Strategy informs tactics, but tactics never inform strategy—and tactics always come last in campaign planning.

We’ll go over each of these in more depth later in the chapter and we’ll spend all of Chapter 4 going into tactics in detail.

WHEN DO YOU DECIDE TO RUN A CAMPAIGN?

You make a decision to launch your campaign when you have exhausted all avenues to enact change within your existing power.

Example:
Your chapter or state office has identified a bill that modifies a refuge’s boundaries and impacts bird migration. Over six months, you have not heard from the legislator you requested a meeting with and a key vote is on the agenda in the next legislative session.

What do you do?

How you choose to respond could impact whether your bill passes or fails. Based on the work you did leading up to this meeting request, you should have assessed the landscape, made note of any opposition, and know how your legislator operates. Based on the intel gathering you’ve done, you’ve come to the conclusion they are clearly not interested in meeting with you.

You’ve run out of options: It’s time to launch a campaign to build power so they cannot ignore or deny you anymore.
SECTION 2
HOW TO CREATE A CAMPAIGN PLAN USING THE STRATEGY CHART

A strategy chart is a tool we use to make sure our campaigns are meaningful, strategic, and realistic. It provides a framework to draw out exactly how we’re going to turn our vision into reality, and keeps us organized and on track no matter what is thrown at us.

If you have a team put together already, then set up a time and place to meet. Display the chart in front of the room. (If you do not yet have a team, no worries: We’ll go over recruitment and how to build your community in Chapter 3). For more information on writing out your strategy chart, see Appendix C.

Here some things to have ready:

• A map of the area/city/district in which the campaign will take place
• Results from a previous election of the decision makers
• A list of your own chapter board members and affiliates
• A sense of your total budget
• A list of potential and current allies
• A list of potential and current opponents

STRATEGY CHART

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<th>CAMPAIGN FRAMEWORK</th>
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**STRATEGY**: In one to two sentences, develop a summary of the strategy for your campaign. What is your plan to win?

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<th>GOALS</th>
<th>ORGANIZATIONAL CONSIDERATIONS</th>
<th>DECISION MAKER (TARGET)</th>
<th>POWER ANALYSIS</th>
<th>TACTICS</th>
</tr>
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<tbody>
<tr>
<td>LONG-TERM</td>
<td>What do you really want? Your vision.</td>
<td>RESOURCES Determine key roles, what assets you have, what assets you will need, your budget, and any planned partner activities.</td>
<td>TIER 1 TARGETS List the names and titles of the decision maker who can get you what you want.</td>
<td>OPPONENTS Identify two to three (or more) opponents who will devote resources to ensuring your campaign does not win.</td>
</tr>
<tr>
<td>INTERMEDIATE</td>
<td>The campaign goal. (Note there can be multiple intermediate goals to achieve your long term goal).</td>
<td>ORGANIZATIONAL GAINS List three to five measurable outcomes that will grow out of the campaign. For example, increased # of activists, members, enhanced reputation, new donors, etc.</td>
<td>TIER 2 TARGETS List the names and titles of the individuals who can influence your Tier 1 targets to get you what you want.</td>
<td>CONSTITUENTS Identify your target group, community, or people who can join as members in support of your campaign.</td>
</tr>
<tr>
<td>SHORT-TERM</td>
<td>A step towards achieving the intermediate goal.</td>
<td>INTERNAL CONSIDERATIONS: Determine three to five problems, tensions, areas of concern, or possible conflicts that may constrain the campaign. Determine your plan to address and by what date.</td>
<td>TIER 3 TARGETS List the names and titles of the individuals who can influence your Tier 2 targets to get you what you want.</td>
<td>COALITION PARTNERS List three to five or more coalition partners that you plan to coordinate with around the issue.</td>
</tr>
</tbody>
</table>
COLUMN ONE: DEFINING GOALS

A goal is a specific victory that you have to obtain over a specified period of time. It is not an accomplishment, task, or idea; it’s clear, measurable, and you must be able to win it. In many cases for issue campaigns, this means that a public vote will either grant or deny you your goal. If there is no vote or decision point, then it is an objective and belongs in the ‘Organizational Considerations’ column.

Not a goal
Keep birds safe in Smithville.

Not a goal
Build a coalition of 200 businesses.

A goal
By June, pass a local resolution for the Municipality of Smithville to become carbon-free by 2035.

THERE ARE THREE TYPES OF GOALS.

1. LONG-TERM
These are goals that your campaign plans to accomplish at least three to five years in the future.
Example: Make New Mexico carbon-free by 2025.

2. INTERMEDIATE
These are goals you plan to achieve in a campaign during the next one to three years.
Example: Pass a state law ending taxpayer subsidies of fossil fuels by 2022.

3. SHORT-TERM
These are the first steps your team takes before reaching its intermediate goal(s) and are typically achievable within six months to one year.
Example: Pass 10 local resolutions creating plans for municipalities to become carbon-free by June of 2020.

When defining your goals, reflect on your vision and what you want to win. For example, getting 10 new volunteers to support your chapter or state office is not a goal, because you cannot win volunteers, because there is no public vote or decision point giving or denying you volunteers. You can accomplish it, so it goes in the ‘Organizational Considerations’ column.

photo by: Lauren McCullough/Audubon
COLUMN TWO: ORGANIZATIONAL CONSIDERATIONS

The ‘Organizational Considerations’ column is where you list your resources for your campaign. These include investments (money) and volunteer/staff time. Know what resources you currently have, then note what you need, how to get it, and by what date you need it.

Next, you want to list three to five objectives to build your group for this and future campaigns. Is it getting 40 new volunteer leaders? Or is it engaging eight new partners to work on a clean energy resolution in your state?

As you work your way down to the third section, list any problems that have to be solved during the campaign that affects your group, chapter, or state office’s ability to run effectively. For example, is there a policy committee that needs to be brought in or created to provide support with outreach and communications? Do your board members have to approve the campaign? What about finances? Is your campaign able to keep to a low budget, high-impact strategy?

Some examples of organizational considerations: money/budgets, staff, volunteers, coalitions, physical meeting spaces, technology, fundraising resources, programming, and well-liked/well-known local members.

COLUMN THREE: DECISION MAKER (TARGET)

A target is the person who has power to give you what you want. In an issue based campaign a target is always a person and almost always an elected official. This column must include names of elected officials or people in power who preside over a governing body such as a city council, state legislature, education board, or water district. In most cases, power is spread out between two or more people, so it is imperative to note who else is a potential target and whether they fit the mold of a Tier 1 or Tier 2 target.

- **A Tier 1 (or primary) target** can give you what you want.
- **A Tier 2 (or secondary) target** has more power than you do to influence your primary target.
- **You can keep going down:** A Tier 3 (or tertiary) target has more power than you do to influence your secondary target . . .

Your target is almost always influenced by votes, money, and their public image. You can gain power over your target when you can influence these factors. Can you credibly threaten to take away their votes, and vice versa? Can you show them you’re able to strengthen their public image, and vice versa? Can you convince a donor to end their funding? These are the dynamics that move a legislator.

COLUMN FOUR: POWER ANALYSIS

Successful campaigns focus on people and develop them as leaders. Without recognizing from the start how valuable your membership and supporter base are to the campaign, you run the risk of losing momentum and wasting time.

An effective advocate is one who understands who your people are and how to motivate them to be transformative leaders. A winning campaign focuses on building your power through people.
1
IDENTIFY YOUR OPPONENTS

An opponent is an individual or group of organized people, often with money, who are against your goals.

Questions to help you identify opponents (groups and individuals):
- Who wants to see you fail?
- Why do they oppose you? How does opposing you align with their interests?
- Which groups/individuals have been against similar issues in the past?

2
IDENTIFY YOUR CONSTITUENTS & ALLIES

A constituency is a community, or group of individuals, bound by a commitment to further a shared goal. An ally is a group or member that cannot join your community, but supports your issue.

Questions to help you identify constituents and allies:
- Who is already on my side? Who is committed to this issue already?
- Who cares or should care about my issue, is greatly impacted by it, and have something to win or lose depending on the outcome of the campaign?

3
IDENTIFY POTENTIAL PARTNERS

Research the lay of the land (legal, political, economic, social, etc.) and research who could potentially partner with you or otherwise support your campaign. Ideally, identify groups that can help you achieve your short-term, intermediate, and long-term goals.

Questions to help you identify your potential partners:
- I might not have power with my target, but who out there does?
- Who do people listen to in my community?
- Who shapes the media narrative in our community?
- Who could be convinced to care about this issue?
This is one way to visualize a power map. Fill in this chart for both your decision makers and your primary opponents; it’s important to understand your opponents as well as your targets.

REMEMBER:

1. Who has the power to give you what you want?
2. Who are the less powerful players that have power or influence over the decision maker?
3. Who of these have the most power or influence?

HOW TO USE THE POWER MAP:

1. Who has the power to decide? Put them in the center.
2. Who are the less powerful players that influence the decision maker? Write their names down in the appropriate category.
3. Who of these have the most influence? Circle them.
4. Who do we have access to? Star them.
5. Look over the list - Whom do we know that has access to and can influence those identified, or the decision maker directly?

Fill out your own. You can find a blank power-mapping chart in Appendix D and E.

**Chart adapted from:**
Midwest Academy
COLUMN 5: TACTICS

These are the steps you must take to accomplish your goals and win your campaign. Tactics always come last, so do not complete this section until you have finished Columns 1 - 4 and have read Chapter 4, where we run through the details of how to make the best-suited tactics for your campaign and how to avoid pitfalls. (If you haven’t read it yet, leave a note to review the chart after you’re done.)

As a rule, tactics should be strategic, creative, fun, and within your groups’ experience. Ask yourself: Have we done this before? If not, is my team comfortable with going along with the plan? Are they excited about it? Is the risk in delivering on this tactic worth the reward? Is there an alternative tactic that better plays on my team’s strengths? As you progress in your campaign, every tactic must demonstrate power and should never be done simply for symbolic purposes. We have seen many great campaigns fail because the tactics did not move the target closer to a goal or they failed to build the necessary power.

SECTION 3
TESTING YOUR AUDUBON CAMPAIGN

Below is the three-step process in which Audubon approaches its campaigns. As you go through it and test to see whether your campaign is strong, keep three things in mind:

THREE-STEP PROCESS

1. GOALS
   Are your goals realistic?

2. STRATEGY
   Is your strategy solid enough to weather any abrupt changes (legal, political)?
   • What would happen if your decision maker resigns from office?
   • What if you realize you focused on the wrong target?
   • What if you needed grassroots pressure, but your volunteers stop showing up?

3. TACTICS
   Do the tactics align with your vision? Does it match up with how you want to demonstrate your power?

photo by:
Luke Franke/Audubon
Why do we need to develop a clear message? The fact that there is a problem big enough to plan a campaign around should mean that the issue is self-explanatory, right? Not necessarily.

That type of assumption can deeply harm your blossoming campaign before it has a chance to take off. For one, we cannot assume people know about these issues, regardless of how important and obvious they seem to us. Not everyone has access to the same level of education, information, or even spare time to look into conservation issues; knowledge isn’t necessarily shared among environmentalists or bird lovers. It is our job to help our volunteers, constituents, and decision makers understand the why and why now.

For another, it is most likely the case that you are going to face opposition, and you better believe that your opposition is out there crafting and perfecting their message, trying to get a step ahead of you. In the worst cases, they’ll try to instill uncertainty or fear—anything to stall action and sustain the status quo. They’ve got the time and resources to blast that message across every platform (TV, newspapers, online, etc.).

To fight fire with grassroots fire, we need to craft our own messaging. We need to create a story that is inclusive, compelling, timely, and to the point. We need to share our vision so that people see themselves in our issue and feel the need to stand up and fight.

SO, HOW DO WE WRITE A MESSAGE?

Start by referring back to your campaign strategy chart. Identify the different groups you’ll want to engage: targets, allies, constituents, opponents. Now let’s flesh these groups out further. As you’ll see, a lot of this is repetition from previous sections.

1. Who is your target audience, specifically?
The “general public” is not an audience.
Consider:
- Who do you need to move to your side in order to show momentum?
- Who did you list as potential allies in your strategy chart?
- Who are the people/groups that you need on your side in order to get your decision maker to take action?

2. Who is your base?
- Who are your best supporters, constituents and allies - people who are already with you on the issue?
- Who do we need to continue to excite – and what excites our base?
3. Who is your opposition?
   - Almost every single campaign (regardless of scope and size) has an opposition – you cannot leave this blank.
   - What is your opposition saying? What is their messaging? How can we get in front of it?

4. Who are your targets?
   - Your targets are always decision makers. A decision maker is a specific person/persons, never “legislators” or “city council.”

7 ESSENTIALS FOR A GOOD MESSAGE

1. CLEAR
   Simple and easy to understand.

2. CONCISE
   Brief and to the point.

3. CONNECTED
   Relates directly to the local community and what is happening right there right now.

4. COMPELLING
   Connects on an emotional or gut level (not just an intellectual one) with the targeted public audience, and communicates a sense of urgency.

5. CONTRASTING
   Something only your side can claim, and clearly distinguishes between the two choices (Good vs. Evil).

6. CREDIBLE
   Not only factual, but also “rings true.”

7. CONSISTENT
   Overarching frame for all campaign communication. Repeated over and over again throughout your group’s campaign communications.

adapted from:
Joel Bradshaw
We need to create a story that is inclusive, compelling, timely, and to the point.

In order to craft the best message,

We need to know what matters to our audience.

1. What messages or themes excite our base?
   • Consider: What are our shared values? What are the stakes if we lose?
     • The messages that get birders excited are not the same messages that will attract the new constituencies needed to build enough power to win. Similarly, the way we communicate to Audubon members will likely be different from how we encourage our members to talk to decision makers.

2. Who is the villain we’re up against?

3. Is there something about this campaign that makes it groundbreaking or superlative?

4. What messages or themes excite our target audience? Which will move them to action?

5. What messages or themes resonate most with your decision makers?
   • Refer back to your power-mapping: What did it reveal about the things your decision maker cares about most?

6. How do we ensure our messaging is inclusive and highlights the diversity, partnerships, and specific voices we want to see in our campaigns?
   • Do we have the right voices in the room while we’re drafting this message?
   • These questions are best answered by reaching out to your surrounding community.

Once you answer these questions,

It’s time to start fleshing out our supporting content:

1. What research/stats/facts do we need to round out our messaging?
   • Be sure to provide citations for any data used.

2. What is our opposition’s response messaging?
   • What are the messages that would most damage our campaign and how would we respond?

3. Which media sources and outlets do your main target/their influencers pay the most attention to?
   • In what outlets have they published op-eds or been quoted as sources in news stories?

4. What existing messaging content can we learn from or use?
   • Have any public opinion polls been done on the subject?
   • Consider: A picture can tell a thousand words, especially when it shows robust grassroots communities taking action. Many media outlets will be compelled by high-resolution and high-quality photography.
   • Do we have these types of images/content? What do we need to do to gather it? Do we need to find a volunteer photographer or hire one, and what should they photograph?
NOW WE’RE READY

Let’s draft our messaging:

1. **What are your overarching talking points** for the campaign?
   • What are the three to five main talking points (short statements that summarize your point) that support that message?

2. **List the three to five specific audiences** you are targeting, and the top messages they each need to hear (when different from the campaign’s overarching talking points).

A good advocate is one who is able to effectively communicate their message, methodology, and campaign process. Determine whether your team understands your vision. You will need to rely on and support them along the way; collaboration is key. In Chapter 3: Building Your Team, we will go over team dynamics, so you can learn how to create a supportive team structure. A coordinated and collaborative team will help you accomplish your goals, strategy, and tactics.

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*photo by:*
Luke Franke/Audubon
Take some time and start drafting out your messaging here.
CHAPTER 3

BUILDING YOUR TEAM

AUDUBON CAMPAIGN
ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird, Florida Scrub-Jay, Allens Hummingbird
WE MUST ALWAYS THINK ABOUT A CAMPAIGN IN TERMS OF A COMMUNITY.

A strong campaign brings people together, making space for multiple levels of leadership and engagement. Equity, Diversity, and Inclusion are among our core values, and as such, it is our job to invite people of all backgrounds to the campaign process. While at first it might seem more difficult to recruit, train, and work with people on your issue, as opposed to going it alone, what you ultimately build will be more successful, longer lasting, and transformational for you and your community.

In this Chapter, we show you how to build a collaborative team.

Section 1
Explores the Story of Self and illustrates how vulnerability in storytelling can help you connect with others meaningfully.

Section 2
Introduces recruitment as an engagement technique to bring people together around an issue.

Section 3
Shows how to build a team grounded in developing leadership.

Section 4
Uses the Snowflake Model to structure your teams and define roles and responsibilities.

Section 5
Highlights leadership principles and guidelines to identify prospective leaders.

You cannot run this campaign alone. As you read this chapter, keep in mind your organizational considerations as it pertains to your campaign’s goals, strategy, and tactics from Chapters 1 and 2. The team you put together will ultimately be responsible for executing your campaign strategy and tactics.
Chapter 3

Section 1

Story of Self, Us, and Now

Stories help us understand who we are and where we are going. Perhaps more importantly, they help us relate and connect to others. In a campaign, these narratives communicate our values and the challenges we want to overcome together. They motivate community members to do something right now. We need to know our own story, our own reason for getting involved, before we can start working with others.

Sometimes we feel our personal reflections and individual stories do not matter. But as we’ve worked to create communities and relate to others, we’ve found that little else matters more. As advocates, our duty is to give a truthful, public account of ourselves: Where do we come from? Why do we do what we do? Where do we think we are headed? Vulnerability is a sign of strength which lets others connect on common experience, struggles, and values. This is why we need a Story of Self.

A Story of Self is your personal call to action and leadership as a result of facing a challenge. Find the courage to share your discoveries. Ask yourself:

1. What is a challenge you faced?
2. What was the choice you made to address this challenge?
3. What was the outcome of your choice?

In developing your Story of Self, reflect on your life experiences to these questions:

1. Why am I called to leadership?
2. Why did I choose to work on this specific injustice or problem?
3. Are there values that compel me to take action?
4. What stories can I share with people that demonstrate how I learned or acted on those values?

Your Story of Self is a tool to practice communication and collaboration as you begin to structure your team. A Story of Self should be anywhere between one to three minutes long. Once you complete your story of self, you can begin to place yourself in the Story of Us, which helps people see why and how they can be a part of something larger, and the Story of Now, which helps people understand why today and why this above something else.
Take a moment and write out your story of self, and follow the challenge, choice, outcomes format.

**YOUR STORY OF SELF**

- Why am I called to leadership?
- Why this specific injustice or problem?
- Are there values that compel me to take action?
- What stories can I share that demonstrate how I learned or acted on those values?

**Story of Us**

- What values do I share with this community?
- What experiences have the greatest impact on this community?
- What challenges has this community faced?
- What change does this community hope for and why?

**Story of Now**

- What is the urgent challenge the community faces?
- What change does this community hope for? Why?
- What does the future look like if this change is, or isn’t, made?
- What choice are you asking people to make now? Why?
- What action are you asking them to take? What impact will this have on the bigger picture?
CHAPTER 3

BASIC PRINCIPLES OF RECRUITMENT

A recruitment appeal is a short pitch asking an individual, or multiple people, to get involved, often by touching on values and self-interest. Self-interest is how we perceive ourselves to be in relation to our community and others.

There are five types of self-interest:

1. **Personal**
   People who join organizations working on issues that personally affect them.

2. **Professional**
   People who join organizations to gain skills that will help them further their career.

3. **Power**
   People who volunteer for the power, privilege, and prestige of working with a winning organization.

4. **Moral**
   People who join an organization out of civic or moral imperative.

5. **Negative**
   People who join an organization to promote themselves at the expense of the community.

When talking with individuals about the opportunity to fulfill a self-interest, you’re helping them see themselves in your community. Self-interest can be a powerful driving force for your volunteers, not just in recruiting them, but in helping them stick around. If you’re working with someone who has a professional self-interest, ask what skills they hope to gain specifically, and find ways to help them develop those skills over the course of your campaign. (We’ll go into more specific actions you and your volunteers can take in Chapter 4.)

Recruitment is the intentional process of bringing new people into your campaign, and teaching them the skills necessary to be successful.

SECTION 2

RECRUITMENT

Generally, people want to join campaigns to feel heard and valued. Recruitment is the intentional process of bringing new people into your campaign, and teaching them the skills necessary to be successful. It is critical to your function as an effective advocate because when people start seeing themselves in your campaign efforts, they are more committed to enact change. In our experience, people must have a sense of ownership behind the cause or else your campaign will fail to motivate them to do anything that builds real, long-lasting power.
Before moving on, list out three people that you know and what you believe their self-interest is. Why do they care? How would you approach them if you wanted to recruit them?

**Steps to Recruitment Success**

Thriving campaigns have ongoing recruitment. (Always be recruiting.) Have you just gotten started and need more people? Recruit. Have you reached maximum capacity and have volunteers for every aspect of your campaign? Recruit, definitely still recruit, and increase recruitment goals.

Your campaign can potentially lose steam if no new members sign up and engage with you and your team. A pitfall of a new campaign is to think that there is nothing more for your volunteers to do, so why bother bringing in new people? If you’ve reached that point in your campaign, congratulations—it’s time to start thinking bigger! What else can you do to help your campaign? Think back to the campaign strategy chart from Chapter 2; did you identify how many volunteers you might need? If you didn’t, go back to your plan and think about the skills, abilities, or expertise that your campaign could benefit from and how many people you might need. Even if you are unsure of the number you need, it is better to set a goal and work towards that. You can always change it later. By reviewing your organizational considerations, you already have an idea of what you may need to put a team together.

Now that you know how many people you want, and what types of skills you’ll need, it’s time to figure out where to find your people. To be clear: Anyone, anywhere can be a volunteer for you. Sometimes it’s just a matter of being in the right place at the right time and asking the right question. Other times, it is going to an event known for having active attendees. Regardless, you will recruit zero of the volunteers you don’t ask. So remember: Always be recruiting. Ask everyone. If you have a petition, bring it with you to movie screenings, religious events, farmers markets, classrooms, and your office. Make sure it has a volunteer sign-up box for people to check, along with slots for emails and phone numbers. Ask everyone who signs your petition to check the box for volunteering and let them know you’ll follow up.

Don’t have a petition? No problem. Sometimes the easiest way to find people is to look through your contacts and start asking. (You’ll probably be surprised by the people who say yes.) Of course, there will be plenty of noes, and a pitfall of recruitment is allowing those responses to affect your ability to seek out more yeses. When recruiting, it is best to have the attitude of a golden retriever and the memory of a goldfish.
Here are some tips for effective recruitment practices:

1. **Be prepared**

   Know what your ask is (i.e., join a petition event, come to a lobby day), and have a few fallback requests at the ready (if they are busy the day of the first petition event, ask if they can come to a different date, or a different action). While they might not be able to come to your event on a Tuesday, it doesn’t mean they are uninterested. Be prepared with multiple asks to see if there is a better fit. If they are unable to commit, let them know that you will be reaching out to them again in the future. When they say yes to a recruitment ask, take a moment to ask them about their interests including past experiences and activities.

2. **Legitimize yourself**

   Identify yourself and who you are. Explain why this person’s participation will make a difference. Explain your connection to Audubon, tell them why you are personally committed to this cause, and why you are volunteering.

3. **Practice active listening**

   If they voice a concern, acknowledge it and address it. People feel significantly more comfortable when they feel heard. Can you identify their self-interest? If not, ask clarifying questions to assess whether the person has heard of your group and may be interested in volunteering now or in the future.

4. **Get a commitment**

   Leave with a definitive answer. Confirm them for a specific date at a specific time, and repeat it back to them. If they weren’t able to commit, give them back up choices, if they still weren’t able to commit, tell them that you’ll reach back out to them on a specific date at a specific time for other opportunities—then actually do it.

5. **Follow up**

   Timely follow-up is fundamental. Track people, conversations, and note specific commitments. Learn their names and make contact in person when they come out to your event. Pay attention to new people; they are your champions in growing the campaign.
SECTION 3: STRUCTURE

TEAM BUILDING

Anyone who’s worked in a teams has seen the good, the bad, and the ugly. We know that not everyone works well in a team and that not all teams are effective. But our success in winning campaigns relies on how effectively we collaborate with others and communicate with each other. We know that building a team is a skill, and like any skill, it can be taught and become better.

We must organize ourselves into collaborative teams to offer:

- **Support and Mentorship**
  Developing members into future leaders of the campaign, providing them with more responsibility.
- **Meet Higher Goals**
  Tapping into team members’ skills and expertise.
- **Develop Relationships**
  Facilitating and deepening commitment to taking action.

EFFECTIVE TEAMS HAVE COMMON CHARACTERISTICS

So how do we build this incredible team? Well, all good teams start by sharing three common characteristics.

CHARACTERISTICS OF GOOD TEAMS

1. **Shared Purpose**
   Your team must be able to identify what it intends to accomplish (purpose) and who it will be doing it with (constituency).

2. **Interdependent Roles**
   Each team member must be able to contribute to bigger goals of the campaign. An effective team avoids both silos and redundancy.

3. **Explicit Norms**
   Your team must set clear expectations. If you’re hosting regular meetings, define who will be doing what in each meeting – will that always be the same? How will documents be shared with the group? What communications tools do you currently use to make important decisions?

*photo by: Luke Franke/Audubon*
CHAPTER 3

THE FOUR STAGES OF TEAM AND GROUP DEVELOPMENT

Just like individuals, teams go through growing pains. It’s critical that we understand how groups are formed, interact, and operate at different stages. The chart on the next page is the Team and Group Development Model by Dr. Bruce Tuckman, a psychologist who studied how powerful, dynamic groups come together and stay together. The four stages of group development are:

1. Forming
   At first, team members are positive and polite. Members are more likely to avoid conflicts as they begin to understand their roles and responsibilities, and settle into their roles.

2. Storming
   As team members get to know each other, conflict arises when different work styles or personalities clash and compete. Team members may begin pushing boundaries or challenging the leader’s authority. This is normal. Stay focused and reinforce the group’s shared goals and vision.

3. Norming
   As the team makes progress through healthy forms of conflict, accepted norms emerge through active discussion, which allows team members to set standards and expectations. Trust develops and team members are inclined to support each other through constructive feedback. As new tasks come up, remember that a group can move between phases at any time.

4. Performing
   The team reaches this stage when tasks are completed. At this point, the team will be able to flourish in new and creative ways. Conflict becomes productive rather than problematic.

photo by: Lauren McCullough
# Tuckman's Team and Group Development Model

<table>
<thead>
<tr>
<th>Stage</th>
<th>Tasks</th>
<th>Behaviors</th>
</tr>
</thead>
</table>
| **Forming** | - Making contact and bonding  
                          - Developing trust  
                          - Members are dependent | - Achieve effective and satisfying results  
                          - Members find solutions to problems using appropriate |
| **Storming** | - Expressing differences of ideas, feelings, and opinions  
                          - Reacting to leadership  
                          - Members are independent or counterdependent | - Members work collaboratively  
                          - Members care about each other  
                          - The group establishes a unique identity  
                          - Members are interdependent |
| **Norming** | - Establishing power and control issues  
                          - Gaining skills in communication | - Decisions are made through negotiation and consensus building |
| **Performing** | - Members agree about roles and processes for problem solving | - Members work collaboratively  
                          - Members care about each other  
                          - The group establishes a unique identity  
                          - Members are interdependent |

*chart adapted from: Tuckman’s Developmental Sequence in small groups*
WHY IT IS IMPORTANT TO BUILD TEAMS

Over time, your campaign will grow in strength. How fast and how strong it becomes hinges on your ability to build a sense of community and get others to see themselves as part of the collaborative effort.

A campaign may take several years—or longer—to achieve its goals, depending on the size and scope of your effort. By then, you’ve likely cultivated an effective team—why give up what you’ve built just because this specific campaign is over? Turn your focus onto a related issue, or build towards something bigger.

Let’s say you pass a resolution to grow only native plants in your community; do you want to now pass a resolution moving your city to 100 percent renewable energy? If so, do you have the membership that is committed to the larger vision of creating change, and will stick with you throughout your various efforts? If no, keep recruiting! A steady stream of volunteers that engage your campaign will promote growth while also developing future leaders.

A strong campaign taps into the skillsets, knowledge, and passions of its community so individuals feel that their role is vital and essential. If members can see their contribution (time, money, resources) matters, then they are more likely to stick around and give you the longevity you need to win long-term.

Take a minute now and write out why you think building a team will be important to your campaign effort, now and into the potential future.
LADDER OF ENGAGEMENT

Part of your job is to look for individuals or supporters who have leadership potential. It does not happen at the snap of a finger, but there are ways you can recruit leaders naturally.

First, you want to start by incorporating a ladder of engagement. A ladder of engagement is the process where individuals take on more responsibility with time, ultimately managing a high level of your campaign. This involves a supporter being recruited, coached, tested, and promoted into roles that foster commitment and skills. The people you seek must demonstrate the ability to perform the roles and functions of each position before moving to the next. For your own blank Ladder of Engagement Worksheet, see Appendix F.

Here is an example of a ladder of engagement:

1. Supporter
   This is the starting point, at the bottom of the ladder.
   An individual signs a petition or is part of your campaign’s newsletters, and has checked a volunteer box at some point in your interactions.

2. Volunteer
   An advocate, who could be a chapter member, volunteer, or staff, reaches out to connect with the supporter. The Audubon advocate asks the supporter to volunteer at a specific event on a specific date at a specific time—and then the supporter actually shows up.

3. Team Member:
   After a supporter or volunteer shows up to a team event (meeting to discuss strategy and timeline) and regularly attends volunteer events, they are considered a team member.

4. Leadership Prospect
   Team members begin to take on more responsibility through leadership. For example, initially they attended petitioning events, and are now planning the events, managing the logistics, and recruiting people to join them.

5. Organizer/Advocate
   This person is a reliable leader, who now manages an entire aspect of your campaign. For example, where a leadership prospect is committed to the planning of a single petitioning event, an organizer/advocate is in charge of all petitioning events, and finds new leaders to plan the one-off petitioning days.

Throughout the leadership process, we need to assess supporters’ ability to follow through on commitments. For example, you may ask a volunteer to attend a canvassing event; it is your job to see if they attend and how well they do. If they are unable to start or complete the commitment, then you may want to match them with a different event or activity. Do not give up on the first ask.

If a team member shows that they can handle a series of commitments (phonebanking, letters to the editor, etc.), they are telling you they are ready to take on more responsibility.

chart adapted from:
Marshall Ganz,
Harvard University
STRUCTURING YOUR TEAM AND PRACTICING COLLABORATION

We’ve all experienced good teams and bad teams. What sets good teams apart? Clear structure and expectations. People are more likely to follow through on commitments, and stick around, if they have a clear understanding of their role and how it fits into the larger effort. Different people are motivated by different things. Some are more likely to stick around if they have a title, while others want to clearly point to their own impact. These reasons are all valid, so let’s talk through ways to give people what they want while simultaneously strengthening your campaign.

ONGOING COMMUNICATION AND CLEAR EXPECTATIONS

It is important to set clear expectation of regular communication. Teams need to meet on a regular basis and work together frequently to accomplish established goals. Before you start building your team, ask:

1. What roles need to be filled?
2. What knowledge, skills, or abilities, would best complement the campaign?
3. How often will the team meet?
4. How will we share and store documents?
5. How will we communicate with others outside the team?

To help you answer these questions and more, we will review the Snowflake Model and focus on the importance of creating inclusive and interconnected teams.

SECTION 4

THE SNOWFLAKE MODEL

The Snowflake Model is a model used to distribute leadership opportunities to a group of committed individuals in order to make them increasingly effective, responsive, productive, and collaborative. The strength and interconnectedness of the team’s relationships hold the snowflake together.

The Snowflake Model, as seen on the next page, is all about delegating responsibility. Let’s say you’re working on a campaign to get a 100 percent renewable energy resolution passed in your town. You’ve filled out the campaign strategy chart, and know your goals, strategy, targets, gains, allies, and opposition. Your tactics, for example, are getting businesses to sign on to a letter in support of 100 percent renewable energy, and getting five Letters to the Editor published in your local paper to draw attention. Knowing that these are your main tactics, you, the current lead of the campaign, will need to recruit a lead of Business Outreach and a lead of Media Outreach. The leads of those two teams will be responsible for the overall goals.

Effective leaders know that just because they’re in charge of the goal doesn’t mean they have to do it alone—and indeed they shouldn’t. The leads of Business and Media Outreach will then recruit their own leaders, or ‘captains,’ to each take on a smaller piece of that goal. The ‘captains’ will then recruit individual supporters/volunteers to carry out the actions.

The Snowflake Model works best when used in parallel with leadership ladder development. You might not start out with the leads of an entire tactic, but you’ll find those individuals who prove that they can and want to take on more.

Map out what your ideal Snowflake Model looks like using the blank Snowflake Model found in Appendix G. What teams do you need? Do you have people in mind already that could fill leadership? For your own blank Snowflake Model, see Appendix G.
SNOWFLAKE MODEL

chart adapted from:
Marshall Ganz,
Harvard University
DETERMINING HOW DECISIONS ARE MADE

Decision-making responsibility is shared among the group members and not held solely by one person or group of individuals. While we want many individuals involved, your job as an advocate is to ensure decisions are final and established through an open, fair, and inclusive process that demonstrates unity. Some decisions cannot be made with the entire team, but it is your job to explain how you came to those decisions, and to be open to community reflection. Your team must be able to support those decisions on the ground and learn from them. A decision that leads to failure or success is not as important as whether the team was able to move in the same direction.

DEFINED ROLES AND RESPONSIBILITIES

Your campaign is at its optimal effectiveness when each individual team member is able to understand his or her role and responsibilities in any task. Are you able to articulate what the petitioner does? What about specific goals they have for each event, or in total? How many people was the phonebanking lead supposed to call before ending the day? Did the data lead upload all the new petition signatures and contact info from yesterday’s tabling event? You will learn in Chapter 4 how specific tactics determine and define what roles you may need. But now, it is important to know that people are more successful when their role is clear, and when they have accountability.

MUTUAL ACCOUNTABILITY

Successful campaigns exhibit and practice leadership development through mutual accountability. Mutual accountability is the process by which two or more partners agree to follow through on committed actions and keep each other on task. Whether you are part of the core leadership or local leadership team, your team members agree to work together and support each other. A horizontal approach, rather than a top-down method, is better at encouraging results by distributing accountability. The Snowflake Model does not demand, or operate, as a hierarchy. Your team’s campaign and operational effectiveness is determined by your mutual accountability structure and how well it is able to define the roles of each team member. Consistent but manageable communication is key for developing a successful campaign that can anticipate and adapt to new challenges.

LEADERSHIP DEVELOPMENT SIGNALS STRENGTH

Every time you meet a new face, you should be thinking about not only how you can get them to join your campaign, but also what leadership opportunities suit them. If we are not recruiting or giving people tools to become leaders in their communities or respective constituencies, then we are not building strength or growing at the pace our campaign needs.
Leaders Have People Who Follow Them

Leaders have people they can bring to events. This is helpful when your campaign relies on turnout for a specific strategy or tactic. Identify people who can motivate and move others in the community. These individuals are most trusted by others, can share a powerful story, and are able to hold people accountable.

Leaders are Inclusive and Diverse

Your leadership must reflect diversity and inclusion from the start and not neglect historically marginalized groups. If your leaders are not representative of the community (racial, ethnic, gender, and/or class, etc.), you cannot expect underserved groups to champion, or even participate, in your campaign.

Both Task and Maintenance Leadership are Needed

Task leadership and maintenance leadership are social work concepts. Task leadership is a type of leadership that is motivated by the accomplishment of completing a number of tasks. Maintenance leadership is the type of leadership that prioritizes the emotional strength and the people supported in it. Every campaign strives to balance the two styles of leadership.
CAMPAIGN GUIDELINES FOR LEADERSHIP AND GROWTH

The next step, once you have found your potential recruits and leaders, is to maintain their growth through coaching. Coaching is how you train your members, set goals, hold people accountable, and move upwards through the leadership ladder. Not everyone is going to come to the table with the skills they need to be successful; it’s your job to coach them (or find someone who can coach them) into being the best version of themselves in this context. Below are some guidelines for leadership maintenance and growth:

1. Practice Evaluations
   Incorporate a positive, growth-producing feedback loop. Congratulate a job well done, and hold people accountable for actions they can continue to perfect.

2. Use Model Leaders to Train Others
   Inspire leaders to teach others how to do what they do. No one should be irreplaceable; no one should wield their expertise as power within the campaign. The campaign cannot stop simply because a key individual, who had special knowledge or a skillset, steps back. This leaves your campaign in a precarious position if you are unable to rebuild that specialized knowledge or expertise in time for your next tactic. To avoid this, build leadership opportunities into every position. Develop a culture of knowledge sharing and delegation.

3. Ask Leaders to Set Personal Goals
   Show your gratitude to the leaders helping you achieve your campaign goals by taking time to help your leaders set personal goals, as long as they do not negatively impact or directly conflict with the campaign. Then, follow through on helping them achieve those goals.

SUMMARY

The best way to help yourself and your campaign is to recruit and train new people to join you, and help any new and existing volunteers move up the ladder of engagement. Discover their self-interests and help them achieve their goals through this campaign. Most importantly, always be recruiting.
CHAPTER 4

AUDUBON CAMPAIGN ADVOCACY MANUAL

**TACTICS & TIMELINES**

*Birds Pictured:* Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird, Florida Scrub-Jay, Allens Hummingbird, Cerulean Warbler
TACTICS

Now that you’ve articulated a vision, set a goal, outlined a strategy, and built a diverse and committed team of people, it’s time to talk tactics. Tactics always come last in your campaign planning. This is because they are targeted actions designed to build your power and advance your goals by applying pressure to a target. If you haven’t laid out your goals, strategy, and power map first, you run the risk of spending lots of time, energy, and money doing things that won’t build your power and move you to victory. You don’t want to accidentally target the wrong person, or do something that actually hurts your cause! This is a waste of your precious time, funding, and your most valuable resource—people.

Audubon defines ‘tactics’ as targeted actions designed to build and demonstrate your power. Tactics demonstrate your growth and advance your goals by applying pressure to a target. They must be done BY someone TO someone.

Section 1
Define tactics and apply guiding principles to ensure your tactics escalate issues and build momentum. As you develop and decide which tactic suits your constituent base and campaign, you will discover that tactics are tools to teach skills and develop commitment in your members.

Section 2
Learn about three common tactics campaigns use to recruit, sustain, train, and build power. When we demonstrate our power to the correct targets and under the right conditions, we create leverage.

Section 3
Learn how to choose a tactic and why some paths ultimately fail in to win campaigns. Through public engagement, we create channels to grow and expand our base.

Section 4
Explore key adaptive strategies to implement on the fly.

Section 5
Focus on the ideal campaign timeline from launch to evaluation. As your campaign grows, we will figure out how to identify when you’ve reached the “mountain top.”
CHAPTER 4

INTRODUCTION TO TACTICS

Grassroots campaigns are powered by people. Without a network of supporters and volunteers, your campaign’s chances of winning are slim to none.

Our decision makers or targets are influenced by constituents who care deeply about a certain issue and who take the time to show it by organizing people to take action together and in doing so greatly amplify the effects of a single action. Remember: numbers are a form of power. Large numbers of fiercely committed people, mobilized by their deep desire for a better world, are one of the most precious things that your well-funded opposition cannot buy with their money (although they may try).

However, numbers alone do no good if you are unable to use tactics in a strategic manner. Getting a decision maker to move on a particular issue will not happen on its own. First, you need to make a political calculation: Do your tactics reflect an accurate portrayal of power relations between your collective supporters, partners, allies, and opposition to the target?

SECTION 1

WHAT ARE TACTICS?

Tactics are targeted actions designed to demonstrate your power, pressure your target, and advance your goals. Effective tactics mobilize your volunteers to take strategic action, gets direct attention about a specific issue, and strives to achieve a specific objective. Every tactic is different, but they all move your campaign in the same direction towards a goal.

Some advocacy-related examples may include:

- Dropping flyers in every city council member’s office to raise awareness of transportation infrastructure needs (highlighting that citizens want a subway line traveling west to east).
- Petitioning people outside of a Walmart to support solar energy.
- Attending a public event or rally to gather volunteer signatures.

Beware! A decision maker will not always be moved by your tactics, especially if you do not base them in your strategy and power maps. Demonstrating power is more than directing clicks to sign a petition. It involves real people showing up to key meetings and making their voices heard loud and clear. Demonstrating power is about being more strategic than your opposition.
Audubon advocacy is all about empowering real people to harness real power to win real campaigns. A tactic is most effective when it meets these criteria: lots of people, all in one place, and face to face with targets. We believe tactics should be informed by the creativity and talent of the people deploying them.

In order to achieve these criteria, you must build tactics that are:

1. **Strategic**
   Your tactic creates concrete or measurable progress toward your campaign goals.

2. **Strengthens your state office, chapter or group**
   Your tactic attracts and engages new people to further your campaign’s capacity to work together to make change.

3. **Develops individuals**
   Your tactic builds on the leadership, skills, and capacity of your constituency.

Your campaign’s potential is limited if you use tactics that fail to meet these criteria. There are times when we will win, and times when we will lose; but if we learn and grow from our work, no matter the outcome, we’ll always be setting ourselves up to be more resilient, strategic, and determined the next time around. Without a doubt, experience and failure are the best teachers.

By prioritizing tactics that hit the sweet spot, you will be in line with your strategic goals, scale up grassroots power, and provide structure and accountability in decision-making so that you do not waste time and money on an activity that will not get you closer to your goal. After all, tactics without coordinated strategy are a waste of valuable resources.
**SUCCESSFUL CAMPAIGNS REQUIRE TACTICS TO ACHIEVE GOALS**

When confronted with unjust or challenging circumstances, tactics are the primary way we engage in the world, enact our values, and realize shared visions. By understanding the origin of the problems facing birds and our communities, we can use existing power structures to overcome barriers and find a way forward.

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*chart adapted from:*
Marshall Ganz,
Harvard University
CAREFULLY PLAN YOUR TACTICS OBJECTIVES TO:

Demonstrate Collective and Coordinated Power
Every tactic makes you stronger. Whether or not a given tactic succeeds, your campaign still builds momentum. Not everyone starts as an expert when it comes to tactics, and that’s okay; tactical talents and abilities are learned through experience. As you continue to work on them, you’ll grow and learn the nuance of how to do better.

Shape and Solidify Leadership of the Campaign
Leadership opportunities let others take on responsibility. Your talents should teach people how to be effective advocates. Everyone grows through trial and error, expanding membership outreach, energizing new and existing constituencies, and keeping those constituencies updated on your progress.

Bring You Closer to the Vision and Long-term Goal
Tactics are important to your campaigns because they help break down your vision, strategy, and overall goals into smaller steps.

HOW NOT TO USE TACTICS

From fundamental tried-and-true practices like phone-banking and canvassing, to new emerging techniques like using social media and data, we have many tools and opportunities to be creative and playful. But trend-setting tactics do not always follow the established power-building criteria and principles. We advise against employing tactics that seem like an effective way to gain influence over a target’s attention, but succeed only in wasting time and critical resources. The best way to identify these tactics is to power-map your decision maker. If you know that they don’t care to hear from constituents, and prefer to hear from businesses, don’t bombard them with dozens of phone calls or hundreds of petitions.

Remember, today’s digital tools are crucial for building support and recruiting new members and volunteers. But digital tools should enhance and amplify your face-to-face relationship-building—not replace it! You cannot build power without building authentic relationships in person. Avoid these pitfalls in your tactics practice and execution.

PITFALLS TO AVOID

1. Moving forward with a tactic when your power-mapping is incomplete or lacking sufficient information on your opposition/allies.

2. Implementing a tactic simply because you heard it from someone else or another state office/chapter/organization.

3. Overestimating your power to compel action.

4. Directing a tactic on an entity that is not an individual or group with decision-making authority (though you can target a decision maker within an entity).
SECTION 3

HOW DO YOU CHOOSE A TACTIC?

When choosing a tactic, you must understand how that tactic demonstrates your power. In other words, how does the tactic get you closer to the long-term, intermediate, or short-term campaign goal? Does the tactic demonstrate leverage over your target?

We choose tactics to demonstrate a specific type and amount of power. For example, if we target a mayor or city manager, our underlying power is votes—and so the tactic must cost them votes or contributions. The power to shame or otherwise damage their image is effective only if your target’s donors and voters not only question their moral legitimacy, but also refrain from giving money or voting them into office for another term.

Conduct a comprehensive review of your campaign’s power analysis to study your opposition. Then briefly look to your chart’s targets and tactics list. What did you discover? Does your chosen tactic have the ability to change the existing power relationship or build durable public will? Choosing a tactic implies that you understand not only how you carry out an action, but also why it matters to build power for constituents.

SECTION 4

WHY TACTICS SOMETIMES FAIL

No matter how much you plan, sometimes things go wrong, whether your target was untruthful in what they say they care about, your power-mapping wasn’t as strong as you believed, your target lost their seat of power, the media didn’t cover your issue, or other strings of unknown possibilities. In these moments, we have to think on our feet and adapt to the changing social and political environment. The tactic might not have done what you wanted, but your campaign is ongoing—it is okay to leave the tactic behind as you move forward.

TACTICAL CHOICES MUST BE PRIMARILY INFLUENCED BY:

1. CAPACITY
   Your team’s capacity to execute the action.

2. ANALYSIS
   Power analysis of target and opponent.

3. RISK
   Tolerance for risk.

photo by: National Audubon Society
ADAPTING A TARGET STRATEGY TO MAKE TACTICS HIGHLY EFFECTIVE

All tactics correspond with a target—a specific person. How will your tactic move your target? What does your target need from you to give you what you want? Below are some adaptive strategies that Audubon campaigns use to implement successful tactics. These are different ways that you can use tactics based on what type of relationship you already have, want to have, or need to have with a decision maker.

Ideally, we would be friendly with all decision makers, but sometimes we need to up the ante. Sometimes being friendly isn’t going to get us to victory. It’s okay to do something that feels daring, maybe even confrontational, if you are being disciplined, tactical, strategic, and principled in your actions. For a blank Target Strategy Worksheet, see Appendix H.

Ideally, we would be friendly with all decision makers, but sometimes we need to up the ante. Sometimes being friendly isn’t going to get us to victory. It’s okay to do something that feels daring, maybe even confrontational, if you are being disciplined, tactical, strategic, and principled in your actions. For a blank Target Strategy Worksheet, see Appendix H.

<table>
<thead>
<tr>
<th>TACTICS</th>
<th>PROMPT no. 11</th>
<th>SEE APPENDIX H</th>
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<tbody>
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<td>YOUR TARGET STRATEGY</td>
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<th>HERO</th>
<th>COVER</th>
<th>PRESSURE</th>
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| Your target is a champion and will do anything in his or her power to advocate and lead for your issue. Show your hero how much their community appreciates them. **Potential Hero Tactics:**
- Give your target an award to recognize their leadership.
- Hold a press/media event with your target.
- Send individual, group, and community ‘Thank You’ letters. | Your target is concerned that their constituents do not approve of them acting on your issue. Give them cover to say yes, so they can explain to their constituents why they voted your way. **Potential Cover Tactics:**
- Collect a significant number of petitions.
- Direct calls to your target’s office.
- Write Letters to the Editor, Op-eds, and have editorials published supporting the issue and ensuring your targets feels equipped take a stand. | Your target does not support your issue and is unlikely to take action on their own. Escalate the issue to make it unavoidable and build pressure so that they cannot ignore you. **Potential Pressure Tactics**
- Follow your target(s) to public events and ask them questions about your issue, and make them feel pressured to respond and act (birddogging).
- Write Letters to the Editor, Op-eds, and have editorials published to pressure your target through media demands and calls for action.
- Have constituents and important community leaders pledge to pull their support. |
SECTION 5

CAMPAIGN TIMELINES

Time is a resource that cannot be replenished once it is gone. The key to having a winning campaign is planning ahead and timing your tactics at different intervals or peaks, so you can sustain power over the long-term. We escalate, elevate, and educate by showing our power. Your campaign will develop a cadence focused on growing its capacity, building momentum towards each goal, and implementing engagement activities that create and build more power over time.

As an Audubon advocate, you must plan and prioritize certain tactics over others given time constraints and opportunities. Examples of things to think about: Is a legislator up for reelection? Was the community affected by an unforeseen circumstance? Do you have enough time and people to plan a rally if you’re also doing a letter campaign and petitioning? Did your target cave earlier than expected? For your own blank timeline to use, see Appendix I.

Understanding the Rhythm of an Advocacy Campaign

The rhythm of an Audubon campaign begins with a foundation period where relationships are developed followed by a kickoff to celebrate the launch of the campaign. A string of peaks from its launch then signal your campaign’s momentum. The point in which you reach maximum mobilization is called the mountaintop. Momentum starts to level off during the evaluation and next steps phase.

Foundation

The foundation period is the start of your power-building activities. These include one-on-one meetings, house meetings, and meetings with small groups of constituents, allies, and other potential partners. These meetings are your best way to find, recruit, and develop leaders. You can ask supporters to join your campaign right away, lead in-person trainings when needed, and delegate tasks when appropriate. This period may take up to several weeks or even longer depending on how quickly you foster relationships with supporters.

Kickoff

Save the date! The kick-off meeting officially announces the launch of your campaign and creates the sense of urgency to get everyone engaged. This period serves as the deadline for planning goals, strategy, and tactics, recruiting people to your cause, and confirming initial commitments. It also functions as a deadline for assigning leadership roles within core and local teams.

Peaks

After the kickoff, the campaign starts to gain momentum. A string of peaks function as tactical milestones and each peak should have a measurable outcome. For example, number of people at a rally, number of signatures, number of organizations pledging support, etc. Your campaign makes progress when every peak aligns with a target and the result brings you closer to your goals.
Mountaintop Goal
The point where your campaign reaches maximum mobilization. This peak is often carefully planned by lead campaigners. During this period, your goal is to have reached a high level of capacity.

Evaluation and Next Steps
The period of celebration, evaluation, and preparation regardless of a campaign’s result (win or lose). We mean to emphasize this step because many of us do not take the time to fully appreciate why we have won or lost, understand the conditions that made it possible, and identify opportunities or tactics that could have made operations run more smoothly. Similarly, learning from failure makes us fantastic leaders for future campaigns.

chart adapted from:
Marshall Ganz,
Harvard University
Do you feel grounded with tactics? They seem simple at first, but they’re actually the result of a lot of planning, research, and thought. If you need, go back and review sections that felt unclear. If you’re ready to move forward and start thinking about your own campaign, it is time to fill out the fifth column of your campaign chart. The Tactics Column is always filled out last.

For each goal (long-term, intermediate, and short-term), identify two to three tactics that focus on the target. The tactics you list must be agreed upon by your team and ensure that it has the most positive potential for your collaborative efforts.

Begin with a clear path forward. Every tactic must have:

- Someone who does it
- Someone to whom it is done
- A date by which it is done
- A strategy behind why this helps move your target to do something they wouldn’t otherwise want to do

Tactics are not meant to be technical, wonky, or boring. Have fun, but be focused! Never attempt a tactic for purely symbolic reasons, despite how interesting it could be. Channel your artistic and creative flare by first evaluating whether it makes sense based on the element of power behind the tactic.

Finally! We’ve come to the end—sort of. In fact, planning tactics is really just the beginning of your campaign. You’ve created a vision and campaign goal, you’ve thought about how to influence your targets, you’ve identified the people you need to win, and you’ve put all of that into a timeline—now, you can execute your tactics. Our goal with this manual is to make you feel completely set up to succeed. To that end, we’ve created a “how to” for some of the main tactics you may find yourself participating in based on your campaign strategy.

Now we’ll go over how to organize and execute a number of specific tried-and-true tactics we use every day.

Remember, your power comes from altering power relations (changing where the money flows and rallying the general public to cast votes on an issue or candidate). You want to tailor the tactics in this lesson to match your group’s strategy, as well as your group’s realm of experience and risk tolerance. Go back to your strategy chart: Review your decisions, look through this list of tactics, and consider which will help you reach your campaign goal. There are plenty of other tactics not listed in this manual, but these are some of the best.
TACTICS IN DETAIL

- **HOW TO ORGANIZE A PETITION DRIVE**
  read more on page 54

- **HOW TO PHONEBANK**
  read more on page 60

- **HOW TO HOLD A MEETING WITH A LEGISLATOR**
  read more on page 69

- **HOW TO WRITE A LETTER TO THE EDITOR**
  read more on page 66

- **HOW TO HOLD A TABLEING EVENT**
  read more on page 58

- **HOW TO THANK YOUR CONGRESS MEMBER**
  read more on page 76

- **HOW TO HOLD A PRESS CONFERENCE**
  read more on page 78

- **HOW TO BIRDDOG**
  read more on page 82
HOW TO ORGANIZE A PETITION DRIVE

Collecting signed petitions and delivering them to your target both demonstrates your issue’s widespread support and is one of the best tools for recruiting new members. If you’re just getting started, and don’t have a long list of names of potential team members, this tactic is for you. If your power-mapping shows that your target is influenced by what their constituents think, this tactic is also for you.

When petitioning, you gather names of individuals who potentially care about the issue. Include a box on your petition form that asks signers if they want to volunteer, along with a line to fill in their phone number and/or email address. (See full sample petition at the end of this section.) This way, people will self-select to get more involved with your campaign.

Once you have an initial group of volunteers, send them out to gather petitions. This is a great tool to teach them more about the issue and gain campaign experience. Volunteers see and feel that they are making a difference when they collect names that add up to a higher goal.

You can compound your impact by getting people out there and making those connections. If one person petitions for two hours, you can collect up to 40 signatures; if 10 people petition for two hours, you can get 400 signatures!

STEP 1
SET A TIMEFRAME AND GOAL

Once you’ve done all of your campaign planning, it’s time to get to work. A petition drive can be done in one day, or it can stretch across many days over the course of a month. It can even last an entire campaign! It depends how many petitions your campaign requires. If our example drive aims to collect 500 petitions in January, and each person can collect 20 petitions per hour, then you’ll need 25 hours of petitioning. If each petitioning shift is two hours long, then you need about 12 individuals to do one shift of petitioning apiece throughout your drive.

Your petition should be available offline and online (when possible). Keep the language concise, use active and direct verbs, and avoid acronyms and jargon as much as possible. After you write it, ask someone outside the campaign to read it through and point out any confusing areas. This will ensure your signees and target understand what you are trying to achieve. Make hard copies of the petition available and hand them out to your team. Do not forget to make a script of what to say when petitioning. (See example at the end of this section.) Finally, make sure you have a volunteer checkbox for people who sign to get involved. This can be done with a simple opt-in message, more detailed descriptions of volunteer needs, or an in-person conversation about future events and opportunities. For example, you may ask: “Would you be interested in volunteering or learning more about our campaign to protect birds?”

TIPS FOR SUCCESS

1. Bring at least two clipboards or tablets per person.
2. Be friendly. Smile and make eye contact with everyone who strolls by.
3. Have the memory of a goldfish and the attitude of a golden retriever: You will get more noes than yeses, and that’s okay and normal.
4. Pick a high foot-traffic area to set up your petition site, like outside grocery stores, town squares,
5. Set a goal for each person petitioning. (For high foot-traffic areas, 20 petitions per hour is a reasonable target; adjust as you discover your campaign’s success rate. You want to keep goals achievable, aggressive, and motivational).
6. Look out for potential recruits: Ask every person who signs the petition to check the volunteer box.
**STEP 2**

**RECRUIT YOUR TEAM**

Now that you know how many petitions you’ll need to hit your goal, it’s time to start recruiting volunteers. If you know you need 12 volunteers to petition in order to hit your goal, then you need to create a plan to recruit them. Generally, about half of the people who say they’re going to show up to do something, actually do. Knowing that, we can set a goal of getting 24 people to sign up for a petition shift so that 12 people will actually show up. In order to get 24 people to sign up, we need to have about 48 conversations with people, as half of them will say no outright.

But what if we don’t personally know 48 people to call about this? No worries: If you know 20 people, ask each of them to bring a friend to their shift. If you are starting from scratch, go out and petition by yourself first in order to get some names. You don’t need all 48 people right at the get-go; you can recruit and build your team over time.

**STEP 3**

**CONFIRM LOCATION AND SHIFTS**

Prioritize constituencies and areas that are most impacted by your issue. Find a local neighborhood or attend a public event. Spread your teams out to different districts in town. Rotate your members to different venues so their interests and motivations are piqued.

People are forgetful and easily distracted. They’re tired, they woke up in a bad mood, the weather isn’t perfect, a stressful period hits in their lives. That’s why we have to confirm shifts with people; it significantly increases the likelihood that they’ll show up to petition. If someone has agreed to do a petition shift with us, we should follow up with them three times: once a week before the shift to confirm details, once the day before the shift to remind them, and once a few hours before their shift to let them know how excited you are to see them later. If someone doesn’t show, call or text them after the event to check in, and see if you can get them rescheduled. For those who did show, sign them up for the next event before they leave.

**STEP 4**

**DELIVER YOUR PETITION**

When the timing is right, based on your campaign plan and timeline, print your petitions and seal them in a box with all the offline signatures. Make an appointment with your target or target’s staff and deliver your petition to the target’s office. When you’re at the office, be polite and concise about the purpose behind your visit/petition delivery. Leave behind a factsheet about the campaign. Ask to set up a follow up time to speak with the target’s office in regards to the issue. Always make sure to leave your contact information behind. Take a photo and document the event. Share your stories with local media, and with us via campaigns@audubon.org.

**PITFALLS TO AVOID**

1. Do not do this all on your own.
2. Do not stay seated by a table or in one place.
3. Do not waste time trying to convince someone who is not with you.
4. Do not rely exclusively on online petitions as a tactic.
5. Do not create negative and/or hyperbolic messages.
PETITION SCRIPT

Deliver a Greeting

“Hi! I’m [your name]. I’m a volunteer with Audubon [chapter or state office]. Can you sign our petition for clean energy?”

If No

“No worries – Thank you for your time and have a great day.”

If Yes

“Wonderful! Thank you. We’re gathering signatures today to ask our state legislators to pass more clean energy in the state in this upcoming legislative session. Please write down your name and address so we can deliver your name to the correct senator and representative. If you’d like to opt-in to receive emails, we’d love to send you invites to local events and more ways to help birds.”

Tips & Tricks

A. If people balk at providing an address, let them know that is how Audubon will deliver their name to the right target.

B. Review the sign-up info and make sure it is legible and unambiguous. If any info is unclear, read the information back to the supporter to confirm.

C. End every interaction on a positive note.

Close the Conversation

“Thank you again for supporting our campaign. Have a great day.”
Support 100% Clean Energy in Washington State

Dear Washington State legislators:

The transition to clean energy is happening all around us. California and Hawaii are moving to 100% clean energy. Here in Washington, Tacoma, Edmonds, Spokane, Bellingham, and other Washington counties have already pledged to go to 100% clean energy. As a state, we need to vote to transition our electricity and energy infrastructure to 100% renewable energy. Transitioning to 100% clean energy is the best way to protect birds and future generations of Washingtonians, now and into the future.

Sincerely,

[insert your name here]
HOW TO HOLD A TABLING EVENT

At any public event or gathering, you can make tremendous gains through tabling. Tabling involves setting up a table at an existing event that is more or less connected to your issue (and that will likely be attended by potential petition-signers and volunteers). Once there, you talk to attendees to gather names, signatures, and other contact information. You want to approach tabling with the goal of bringing new potential supporters or volunteers into your campaign. Give people the opportunity to take action on the spot. Whether that’s signing a petition, taking a picture for social media, or some other action. Tabling makes face-to-face interactions focused and fun, and helps you build power.

STEP 1

FIND AN EVENT AND DETERMINE YOUR GOALS

Check your local community websites, social media, and newspapers to identify potential tabling opportunities. Create a list of 3-5 possible sites and begin outreach to the organizers. Find out when and where the event will take place, as well as what you can bring. Some restrictions and fees may apply.

Tabling is more than handing out brochures and other campaign literature. You want people who come by your table to take action now! Especially if you know that you need a certain number of signatures, or a certain number of pictures, this is an amazing opportunity to reach your goals. At a high-traffic tabling event, you can get up to 30 signatures in an hour. (See steps 1 & 2 in the ‘How to Plan a Petition Drive’ section to figure out your goals and recruitment plan.)

STEP 2

BE PREPARED

Assign at least two individuals to be at the table at all times. Is the event a month, a few weeks, or days away? Make sure you find time to train your volunteers prior to the event. Fill them in on your issue and action. Don’t forget tabling logistics: Who will arrive with what? Where can they find sign-in sheets? Make sure volunteers know their individual sign-up goal for the event. This will keep your volunteers motivated and energized throughout the day. Post flyers on social media channels and in newsletters, and communicate to your members that you will be at XX event. The more people who know where to find you, the more people will stop by and interact with your campaign.

STEP 3

DURING THE EVENT, ACTIVELY APPROACH PASSERSBY

Look attentive and be on alert. We should engage as many people as possible. Come up with something catchy to say to snag someone’s attention. For example, lines such as “Do you know what the #1 threat to birds is?” may pique the interest of passersby enough for them to stop, listen, and learn about your work.

STEP 4

FOLLOW UP WITH YOUR NEW SUPPORTERS

After the event, get in touch with your new supporters with a phonebank and ask them to volunteer. Use this opportunity to learn more about their interests and how they can best support your campaign. Read the ‘How to Phonebank’ section for more details. Follow up with all of your volunteers from the day and ask them to sign up for the next shift.

PITFALLS TO AVOID

1. Do not eat food at table.
2. Do not smoke at the table.
3. Do not sit behind the table.
4. Do not forget to bring event materials with you.
**Deliver A Greeting**

“Hi there! Can you sign this petition for clean energy and birds?”

**Make a Connection**

“Great, thank you. Audubon’s mission is to protect birds and the places they need now and into the future, and climate change is the greatest threat to birds. Today we’re collecting signatures to let our state lawmakers know their constituents want climate solutions like responsibly sited wind and solar. Would you like to add your name?”

**If No**

“No worries – thanks for stopping by.”

**If Yes**

Wonderful! Thank you. Please write down your name and address so we can deliver your name to the correct senator and representative. If you’d like to opt-in to receive emails, we’d love to send you invites to local events and ways to volunteer.

**If No**

“No worries – thanks so much!”

**Volunteer Ask**

Will you sign up to be a volunteer? We have some really exciting events coming up, like this one, where you can help make a difference!

**If Yes**

Great! Make sure to mark yes in the volunteer box on the petition and we’ll be in touch.”
HOW TO PHONEBANK

Phonebanking is a series of phone calls that you (or a volunteer) make to a current (or future) member of your campaign, discussing the issue you’re working on, and ending with an ask. The ask can range from, “Will you come out to X event?” to “Will you submit a letter to the editor to the local newspaper?” to “Will you ask your legislator to vote for a given bill?” and more.

This tactic helps enhance your campaign’s reach in several ways:

1. Volunteer Recruitment  
   Find and connect with people who share your values and vision for your campaign, advocacy, and grassroots efforts.

2. Event Recruitment  
   Sometimes people don’t read their emails or see Facebook invites. Phonebanking can be an incredibly useful tool in recruiting people to show up to an event.

TIPS FOR SUCCESS

1. Always have a script.

2. Aim to call your constituents between 5:00pm and 9:00pm. Weekends are great too; try between 12:00pm and 7:00pm.

3. Track your responses and follow up as soon as possible.

photo by:  
National Audubon Society
STEP 1

SET A PHONEBANKING GOAL AND FIND A VENUE

Phonebanking goals should be based in the Rule of Halves. The Rule of Halves dictates that half of the people who sign up to do something will actually end up doing it. Therefore, we need to double our goal in order to accomplish what we need. Similar to petitioning goals, during a phonebanking session a caller averages about three yeses an hour (meaning one volunteer can get three people to say yes to take action in an hour). A typical phonebanking shift is anywhere from two to five hours.

Let’s say we want 10 people to show up to a letter-writing party and our only means of recruitment is phonebanking. Assume most people have a two-hour phonebanking shift, and can get six yeses per shift. In order to get 10 people to show, we need 20 people to say yes from these calls. 20 people to show means you need three to four people, each calling for two hours.

To host a phonebank with more than three people, we’ll need a space that can accommodate the sound of multiple voices speaking at once. Do you have access to a center, chapter or state office? Can you reach out to your friends, family, neighbors, and colleagues for ideas for spaces? A good option may be a volunteer’s house as long as the person is comfortable with inviting new faces into their home and assuming technical equipment and Wi-Fi is available. You can even ask a school, university, place of worship, library, or business to rent their space.

STEP 2

GETTING THE NUMBERS

Now that we know how many RSVPs are needed for our event, we need to determine how many phone numbers we need to call. It could be the case that we call 20 people, and all 20 people pick up and say yes—but that is highly unlikely. It could be the case that we have a large enough community that we don’t need to do all of our recruitment by phonebanking. We recommend that, if possible. It’s better to diversify your recruitment tactics in order to diversify the people you recruit.

For the sake of this example, let’s say we’re doing only phonebanking, and we’re starting our campaign from scratch. Referring back to the rule of halves, half of the people who pick up the phone will say no. That means that 40 people will need to pick up in order for 20 people to say yes. And let’s assume that half of the phone numbers we call are either out of service, or no one picks up. That means we need 80 numbers to call, to have 40 people pick up, to have 20 people to say yes, and finally, 10 people to show. What if we don’t have 80 numbers to call? Luckily for us, we can refer back to the ‘How to Hold a Petition Drive’ and ‘How to Hold a Tabling Event’ sections to look into ways to gather new names and phone numbers.
STEP 3
CREATE MATERIALS AND SCRIPT

Gather your materials and prepare a script. (See in later pages for a sample script.)

Materials should include:

• Call list (a list of names and numbers of people you will be phonebanking)
• Phones (if available/needed)
• Phonebanking script
• Response forms
• Pens and pencils
• Drinks and snacks
• For fun: make a phonebanking bingo board, where each square is a response you’re likely to hear over the phone.

STEP 4
RECRUIT, RECRUIT, RECRUIT!

Now that we know how many people we need, and where we’ll be, it’s time to start recruiting. Begin with your personal networks including immediate family, friends, and neighbors. Combine this tactic with tabling or petitioning to generate additional buzz around your issue and event. Diversify your reach by targeting college campuses, congregations, cafes, and other business hotspots with high foot traffic. Is there a festival or public event coming up? Check in with the local event organizer and see how you can reach new constituents and potential recruits. Refer to the ‘How to Organize a Petition Drive’ section (Step 2) for more recruitment details.

STEP 5
TRAIN YOUR PHONEBANKERS PRIOR TO THE EVENT

Take time to effectively train your volunteers prior to the event, or before phonebanking.

  This includes going over setup and equipment, scripts, and messaging. Role-play so they can see how you make the ask and then move on to the next call. We all learn differently, so keep in mind your volunteers may need some direction. Designate a trained team member who can help at a moment’s notice. Some of your volunteers may get discouraged by the low contact rate and/or hang-ups, so keep energy high and maintain an optimistic perspective. If you notice a volunteer is struggling, walk them through a new approach and brainstorm new messages based on the script they adapted.

PHONEBANK TIPS:

1. Smile while you dial
2. Stick to the script
3. Have a strong ask

Remember to set each phonebanker up with a specific set of goals for their shift. If they’re phonebanking for two hours, a good goal would be: six yeses to action from 12 phone conversations. Goals keep people motivated, and keep them dialing.
STEP 6
WRAP UP AND RECAP THE DAY’S RESULT

Before your volunteers leave the event, thank them for their time. Let them know that their efforts are making change and building your campaign, getting it closer to the end goal. Review the day’s result. What messages worked better than others? Who was your rock star caller? Compare how many yeses and noes you got with the goal you had for the night. Lastly, and most importantly, sign up every single person who came to the phonebanking event for another volunteer shift.

PITFALLS TO AVOID

1. Do not rely solely on volunteers’ own phones or data plans to make calls. You can look into using google voice, using office lines (if office space is available), using campaign budget (if available) to purchase phones, or other alternatives.

2. Do not forget to bring snacks or other food.

3. Do not expect or anticipate volunteers to stay longer than two hours.
Hello, is [their name] there? Hi [their name] this is [your name] from Audubon [insert State], we met when you signed a petition to support the solar campaign; how are you? [listen and respond]. Great! I just wanted to give you a call to thank you for signing the petition (today/yesterday, etc.) and to tell you about an upcoming event. [pause]

Great! First of all, what made you want to sign the petition in the first place? [listen, respond as appropriate. possible follow up questions: have you heard about or been concerned about this issue before? are you from around here originally? do you go to the farmer’s market a lot? etc.]

Yes, I agree. It’s a major problem that here in [insert state], we’re among the top in the country for solar capacity and nearly last in solar infrastructure. Homeowners and business owners who want to invest in solar are faced with outdated regulations, making it expensive and complicated.

The good news is that we can bring more solar to [insert state], create more clean-energy jobs, and bolster our state economy by giving [insert state] a choice in how they finance their solar.

Our state legislators will act only if they know that there is widespread public support to remove financial roadblocks to solar. We have a short legislative session, so we need to act now.
That’s why we’re kicking off 2019 by launching an exciting campaign right here in [insert town]. We’ll be building a local coalition, gathering petitions, gaining media attention, and more to push [insert state] in the right direction. To make it happen, we’ll need a lot of people involved, so we’re asking everyone who has signed a petition to join us at our upcoming kick-off meeting. Our campaign kickoff event is this [insert date and time] at the [location]. It’ll be a great way to meet other people who care about this issue, hear about our strategy for the spring, and take action. It’ll also be a lot of fun. Can you come to the kick-off meeting on Wednesday evening?

If YES: “Great! Again, the event starts at [time]. Do you have any friends you’d like to bring along? The more people we have, the bigger an impact we can make. [listen, respond].

Awesome, the campaign organizer’s name is [first name] and you can reach them at [insert phone number], don’t hesitate to reach out if you have any questions. [insert address] Thanks again, and we’ll see you at [time] this Wednesday at [name of location].

If No: No problem, there are lots of other ways to get involved. We will be petitioning tomorrow from [time] at [location] and [date]. We have a morning [time] and afternoon shift [time] at [location]. Collecting signed petitions is a great way to show our legislators that there is widespread public support for adopting better solar policies in the state. Can you come petition on [date]?

If Yes: Great, thanks for your help! We’ll text you the exact meeting location. Is this the best number to reach you at?

If No: No problem, we will keep you updated on the campaign and let you know about events in the next couple of weeks!

Thanks again for supporting the campaign—have a good night.
HOW TO WRITE A LETTER TO THE EDITOR

Writing a Letter to the Editor, or LTE, is an effective way to localize and personalize ongoing issues. We know that the opinion section of a local paper is one of the most widely read sections. Writing from our personal experiences is a great approach to getting your decision maker’s attention on the subject matter (if your power-mapping shows that your target pays attention to local media).

Let’s say you decided that LTEs are one of the tactics you’re going to implement based on your campaign plan. Luckily for you, LTEs are pretty easy to do from the comfort of one’s home or office. As a tactic, they don’t take much time on any individual’s part, but when done en masse, can have a significant impact.

Most LTEs function as an advocacy tool to educate the community to help sway public opinion. They also work best to get an elected official’s attention while also giving your issue publicity. LTEs can work as individual notes about an issue, or can be written in response to a recently published article.

STEP 1
RESEARCH 2-3 LOCAL NEWSPAPERS

Use the tool 50states.com and onlinenewspapers.com to look up over 3,000 newspapers across the country. Narrow your search to 2-3 based on your state, city, and zip code. Your location is important. Once you have identified a few options, review them one by one. Visit each newspaper’s website and locate the “Letters to the Editors” section. Most are found under “Services.” If you’re unable to find this information on the website, make a call to the newspaper office.

TIPS FOR SUCCESS

1. Follow the newspaper or publication’s rules for submitting an LTE.

2. Typically, LTEs are between 150 and 250 words. If your LTE is too long, there is a very high likelihood it will not be accepted. If it is, your important points could be edited out by the publication’s editor; better to edit it down yourself to choose which points are most important to your campaign.

3. If a number is listed, call to ensure they received your LTE submission.

4. Do not give up! Published or not, it may have been an extremely busy period for the newspaper. Submit to other local outlets.
STEP 2

KNOW YOUR TALKING POINTS

Based on your campaign planning, you know your issue, and you know what you need to say to convince your target. The LTE is a perfect place to utilize your talking points in a concise, personal manner.

STEP 3

BEGINNING, MIDDLE, AND END

Begin with “Dear Editors.” Keep it short and the point. LTEs are typically between 150 and 250 words. Make only one point in the LTE, and make sure you keep it personal. Add a fact, if needed, in the main body to support your claim or argument in an interesting way. But keep your factoids to a minimum. Tell readers, including your elected officials at every level, what you want them to do. Don’t hold back: Be aggressive, yet analytical, with your ask. This should make the reader want to respond in a positive way. Actions or responses include urging the scheduling of a key vote, sponsorship for a bill, attending an event, or support for a position.

CHAPTER 4

PITFALLS TO AVOID

1. Do not submit the same letter more than once to a publication.
2. Newspapers only accept letters from real people.
3. Do not engage in an argument ad hominem (an attack on a person or group of people).
4. Do not make broad statements that cannot be backed up with facts.

STEP 4

PROOFREAD AND SUBMIT

All done? Great! Reread, proofread, and spell-check your letter by forwarding it to a friend or colleague for a second opinion. Ask them to point out anything confusing. Note your title (example: Audubon Volunteer) and which chapter or state office you belong to at the bottom of the page under your name. Submit to the newspaper via email or using a form. Follow up with the newspaper two days later to see if they’re going to publish. Remember to use Audubon as a resource and seek the additional review from your chapter leader, members, or a state office representative. You can also reach out to us at campaigns@audubon.org and a staff member will get back to you within 24-48 hours. Plan ahead of time before you submit.
LETTER TO THE EDITOR

[Date]

LETTER TO THE EDITOR
[Insert contact information here]

Dear Editors,

One hundred years ago, the Migratory Bird Treaty Act (MBTA), one of our earliest and most effective conservation laws, was enacted to protect over 1,000 native bird species, including over [Number of birds] which spend part of the year in the [Insert State Name].

The MBTA is supposed to provide an incentive for companies to implement best practices to avoid killing birds. However, under proposed HR 4239 and under a recent reinterpretation of the MBTA by Secretary of the Interior David Bernhardt, the U.S. Fish and Wildlife Service will allow businesses a free pass to kill birds with practices that endanger them, or even known to kill them, but are not deemed purposeful or intentional.

As a concerned citizen and as a member of National Audubon Society with [Personal story and reason for caring], I am deeply concerned about this. I call upon my [Federal legislators] to protect and strengthen the MBTA.

Sincerely,

[Name of writer]
[Writer's title] example: volunteer, chapter member
[Audubon chapter and/or state/national]
[Contact information (phone, email)]
HOW TO HOLD A MEETING WITH A LEGISLATOR

Meeting with a legislator is a key and fundamental element to our democracy. In many cases, we have the ability to go directly to our legislator and speak to them and their staff about issues that matter to us. Using your voice to speak up on the issues you care most about is one of the most democratic actions you can take.

STEP 1

MAKE AN APPOINTMENT WITH YOUR LEGISLATOR

Depending upon the state legislator, and time of year, setting an appointment can be a challenge. At a minimum, call your legislator’s office several weeks in advance of the date you want to meet, tell the scheduler how many attendees you anticipate having, and identify the subject matter you want to discuss. Be patient and persistent when reaching out to the office. Some staffers will take two to three weeks to confirm your proposed dates. If you are unable to get a confirmation, send out a weekly reminder via email and/or make a phone call indicating your interest to meet with your target. Doing so demonstrates how much you care about your issue. In some cases, you will be meeting with the staffer and not the legislator. Do not be upset; staffers report back to their bosses and your message will be heard.

Not sure who your legislator is? Use the tool https://www.openstates.org and enter your address to find a complete list of your elected officials including phone numbers, office locations, and social media handles.

TIPS FOR SUCCESS

1. Prepare your talking points prior to the meeting.
2. Build a diverse and inclusive group.
3. Have a strong ask in the meeting.
4. Remember to follow up.

SAMPLE CALLING SCRIPT FOR A SCHEDULER:

“Hello, my name is [your name], and I’m calling as a constituent and a member of the National Audubon Society. I’m wondering if there is any availability to meet with [insert name of elected official] on [insert day, month, and year] between [insert times]. Would this time work for you? We’d like to discuss issues relating to clean energy and conservation. There are going to be five of us in attendance.”
STEP 2
BUILD A TEAM OF 3-4 PEOPLE AND ASSIGN TIME MANAGEMENT ROLES

Once you’ve set your date, it’s time to assemble your team. It is best to identify people who can tell an impactful personal story or speak well about the facts. Assign specific roles to your team members ahead of time, including a facilitator, timekeeper, ask maker and note taker. The facilitator will lead and introduce the group while keeping the conversation going and staying on topic. The timekeeper will keep an eye on the clock if there is a timed agenda or other constraints. The ask maker is responsible for making the ask and getting an answer from the elected official. The note taker will jot down what is discussed in the meeting with attention to body language included. Each person should have a role in the meeting.

You want to bring a diverse group of individuals who each take a different approach to changing your legislator’s mind. Be strategic about whom you bring. If you know your target is a veteran, for example, bring someone with military experience. Aim for a maximum group size of five people.

STEP 3
IDENTIFY TOPICS AND TALKING POINTS

Depending on the issue, prepare your team by reaching out to your Audubon state office or national office at campaigns@aubudon.org. Let them know you will be coordinating a constituent meeting. In turn, they may be able to help identify policy priorities, talking points, and background information for you.

STEP 4
ROLE PLAY AND ATTEND THE MEETING

Conduct a role play (see below) and practice what you intend to say and accomplish during your meeting. Review your talking points and practice your elevator pitch. Practice the full role play; it’s better to identify weak points before the meeting than during it.

At the meeting, have everyone introduce themselves, round-robin style, and make your ask. Your ask is a concrete action that has a ‘yes’ or ‘no’ answer. If the legislator is not clear with their answer, ask them what they need in order to say yes and be sure to follow up as needed. Make sure to leave behind materials, like fact sheets, for the legislator to look over. Make sure everyone is prepared with talking points and are also prepared to be active listeners and improvise. Meetings don’t always go how we intend, and we don’t want to come off as tone deaf if we keep to our agenda in spite of how the meeting is going.

STEP 5
SEND A THANK YOU LETTER AFTER THE MEETING

Send a ‘Thank You’ letter to the office on the same day or within 24 hours of making contact with the legislator and their staff. A letter is a good way to maintain and deepen the relationship with your target’s office. The message also serves a helpful reminder of what was discussed and next steps.
STEP 6
EVALUATE AND SUBMIT FORM

Take this time to go over your notes of the meeting. How was your interaction with the legislative target? Did any body language reflect a positive or negative stance toward an ask? What language did they use to articulate whether or not they would support you? Evaluate your performance and check in with your team members on highlights of the conversation.

PITFALLS TO AVOID

1. Do not be late.
2. Do not invite non-constituents to constituent meetings.
3. Do not forget to follow up after the meeting to hold your legislator accountable, or to thank them.

photo by: Luke Franke/Audubon
ROLEPLAY SCRIPT TEMPLATE
USAGE: EFFECTIVE LOBBY DAY MEETING

Key Members of the Group
Assign the following roles as follows:

- **Group Leader:**
  This person is typically the chapter or volunteer leader or Audubon state staffer. Responsibilities include introducing the group, introducing the issue, describing the problem, making the ask, and closing the meeting.

- **The Ask Maker:**
  This person understands the key points of each issue and can back statements up with supporting evidence or facts. They can clearly articulate a concise and urgent message directly to the legislator.

- **Storyteller:**
  This person must be able to share a localized and personal story that is relevant to the issue being discussed. The story should take no longer than two minutes to tell.

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photo by:
National Audubon Society
Senator Smith:
Good morning everyone.

Group Leader:
[shakes hand] Good morning, Senator Smith. I’m [Group Leader name], leader of [chapter/state office], an environmental nonprofit with [number] of members residing in [your city/state] dedicated to protecting birds now and into the future. Thank you for taking the time out of your day to meet with us.

The Ask Maker:
[shakes hand] It’s a pleasure to meet you, Senator Smith. I’m [Messenger name] from [Messenger’s town]. I live in the [Messenger’s neighborhood].

Storyteller:
[shakes hand] Senator, I’m [Storyteller name], also from [Storyteller’s town].

Senator Smith:
It’s a pleasure to meet all of you and I’m happy to have you here. Tell me, what brings you in today?

Group Leader:
As the state’s largest advocacy and grassroots nonprofit dedicated to protecting birds, we want to share some ideas with you about how we can create more charging stations in [your city/state] so more people drive cleaner cars, save money at the pump, and reduce their carbon footprint.

Senator Smith:
Have a seat. I haven’t had a chance to look into this issue. Please explain.

Group Leader:
Senator, before we begin, we would like to know how much we appreciate your commitment to public service, and that we respect your time. Does 30 minutes today still work for you?

Senator Smith:
Yes, that still works.

The Ask Maker:
Great. Senator, we also appreciate that you sponsored the Fight for Fifteen Act, which increases the hourly wage to $15 by 2020. Your ‘Dear Colleague Letter’ in the Finance committee helped shape the direction of our state.
Senator Smith:
Thank you! As you may know, growing up in Silver Spring my parents worked two to three jobs and their sacrifice provided me the opportunity to go to college.

The Ask Maker:
Thank you for sharing that with us, Senator. It’s a tough economy out there and we need good paying jobs so families can afford access to higher education, driver safer cars, and live happy and healthier lives.

Senator Smith: I agree.

Group Leader:
We are here to touch on a pressing matter affecting [your city/state] neighborhoods and families. Charging stations are in limited supply. More electric vehicles are on the road each year, creating a demand that the city has yet been able to address. This issue is affecting cab drivers, and senior healthcare and transportation service providers. Just last week, long lines and wait times at three charging stations in [your city/state] caused major roadblocks and traffic jams. Some people weren’t able to charge their cars and others could not get to work the next day or take their kids to school.

The Ask Maker:
As the city struggles to keep up with the demand of electric vehicles and charging stations, we’re seeing this affect low-income families who don’t have nearly the same access to charging stations. You can drive for miles in some parts of [your city/state] without seeing one charging station. In the places that do have a charging station, such as parking garages, drivers are subject to unreasonable parking fees in addition to service fees. People are feeling it in their pocketbooks.

Storyteller:
Small business owners are feeling the pitch too. As an independent cabbie myself, I often struggle to make ends meet with an electric vehicle. In fact, I am making $15,000 to $20,000 less than what I made driving a standard fuel vehicle. And when I applied through the state’s electric taxi program, I was promised savings not skyrocketing costs. The lack of charging stations is driving me out of business!

Senator Smith:
This must create an unimaginable hardship, but if we are to going to create more charging stations in the city there needs to be a collaborative route that we can take. Simply calling on the state to solve this issue won’t win anyone over.

The Ask Maker:
This is where the rubber meets the road, Senator. The proposed change we want to see is to require any new or existing retail and developments, including gas stations, apartments, parking garages, and grocery stores, to modernize their properties through a public-private partnership. The partnership would mandate a plan to add new charging stations in neighborhoods
and communities that need them most while spurring economic growth in new areas. As new charging stations come online, and more people choose to drive electric vehicles, the state will start seeing an immediate reduction in carbon emissions and an increase in tax revenue through new charging locations and sites. Can we depend on you for your support?

- **Senator Smith:**
  This is a refreshing proposal. Do you have any more information on it?

- **The Ask Maker:**
  Of course, Senator. Here is a factsheet. If you have any questions, don’t hesitate to reach me. My contact information is listed on the back.

- **Senator Smith:**
  I’m going to need some time to look over this, but it sounds promising.

- **Group Leader:**
  That’s great to hear. Please look this over, and we will follow up with your office next week to see if you need any additional information. Would [date and time] work for you to follow up?

- **Senator Smith:**
  Thursday at noon—yes that works for me.

- **The Ask Maker:**
  Great, what is the best email to reach you by?

- **Senator Smith:**
  smith@house.state.md.gov.

- **Storyteller:**
  Perfect. Thank you so much for meeting with us today, Senator. I know I’m personally excited to follow up with you about this project, and believe it is the best path forward for the city and birds.

- **Senator Smith:**
  Indeed. I look forward to staying in touch. It was a pleasure to meet with you all.

- **Storyteller:**
  Senator, may I snap a picture of you with us for our monthly newsletter?

- **Senator Smith:**
  I think I can take a moment for a picture, [Storyteller name]. And, by the way, thank you for providing safe, clean, and reliable transportation for [your city/state]. You’re helping us meet our state climate goals!
HOW TO THANK YOUR ELECTED OFFICIAL

A Thank You letter goes a long way to building a strong and lasting relationship with your elected official. It is an advocacy vehicle used to communicate urgent messages and influence your target on what action you want them to take, as well as an impactful follow-up tactic. As part of your campaign efforts, this tactic plays a key role in expressing your engagement plans with your target. It also solidifies your relationship and deepens your commitment to hold the target accountable to your constituent demands. Your target will be hearing from your opposition, too, and likely more often than from you, so use every opportunity you can to connect with them. The more they hear from you, the more attentive they will be and the more likely they will respond and reach out to you for updates on your campaign.

TIPS FOR SUCCESS

1. Prioritize handwriting your letter, but be mindful of your legibility. Handwritten letters are a way to get a legislator’s attention. However, if the issue is urgent, send via email.

2. Be factual and friendly.

3. Follow the three C’s: Be concise, constructive, and courteous.

4. Be sure to include all of your contact information.

PITFALLS TO AVOID

1. Do not use your employer letterhead.

2. Do not discuss more than one issue or address a topic irrelevant to the jurisdiction of your legislator’s district, state, or constituency base.

3. Do not use threats or abusive language.

STEP 1

ESTABLISH MESSAGING POINTS

By now, with your campaign established, you know what to write. Make sure your messaging points relate back to your overall campaign vision and goals.

STEP 2

ADDRESS THE TARGET IN THE LETTER CORRECTLY

Always begin with “The Honorable.” Give thanks and remind your target how you plan to follow up with the conversation in the future.
THANK YOU LETTER FOR YOUR ELECTED OFFICIAL

‘THANK YOU’ LETTER TEMPLATE

[date]
The Honorable [full name]
United States Senate/House of Representatives/State House or State Senate
City, State, Zip

Dear [Congressperson or Senator] [full name],

On behalf of my [name of chapter] chapter with more than [insert number] active members in the state of [your state], we want to express our gratitude for connecting with you and your staff on [mm/dd/yyyy]. It not every day that we have an opportunity to talk with leaders about expanding solar access to homeowners and small businesses, and how it can help protect birds now and into the future.

We’re facing a critical moment in time: to either take action today or risk an uncertain future. While we know that you don’t fully support [issue], there is still a path forward to a clean energy economy. Your support for [insert bill number] will make it easier for schools, churches, businesses, and homeowners to switch to solar. The bill will not only provide higher-paying jobs and a healthy environment, but also create demand for clean energy technology in the state.

Our petition in support of [insert bill number] includes 500 residents and 100 small businesses that call on you to sponsor the bill now. If we delay progress any longer, our state won’t remain competitive and our economy may suffer as a consequence. The state cannot afford to fall behind nationally.

We urge you to choose clean energy to protect birds and our beautiful communities.

Sincerely,

[insert name]
[insert title, address]
[insert Audubon chapter]
[insert city, state, zip code]
[insert telephone]
HOW TO HOLD A PRESS CONFERENCE

This tactic is high-level presentation of information to the media and the public, especially important when it comes to breaking or urgent news. A press conference is an opportunity to make headlines on TV, radio, print, and online news. A press conference can be a lot of work, so make sure you have a team of people who are willing to support this event.

Before deciding to hold a press conference, make the determination that what you have to say is timely and newsworthy. Is this information better suited to a press release instead of a full press event? [See page 81 for sample press release]. You want to be strategic with your outreach, and you want to be seen as a commanding voice of constituents. A few questions you could ask yourself before deciding to hold a press conference: Is your campaign holding a kickoff meeting soon? What milestone has your campaign hit? Has it reached the mountaintop? Do you have a report you want to release? Do you have a new coalition to introduce? Have you collected thousands of petitions you want to announce? Did you win your campaign? If you answer “no” to all of these questions, then likely you should not host a press conference.

TIPS FOR SUCCESS

1. Create an agenda ahead of time and fill in the gaps as you draw closer to the event.


3. Invite media and the public.

4. Bring snacks.

STEP 1

CREATE A WORK PLAN TO DEFINE YOUR GOALS

Define your goals for the event: What, specifically, do you want to get out of it? How many media hits? How many people in attendance? Some good goals may include:

- Getting publicity about your campaign efforts and problems.
- Getting media coverage across TV, radio, print, and online in important districts.
- Getting more people involved to champion your issue.

Whatever the goal, define it and stick to it. Your work plan should include finding a suitable place, creating a checklist, setting a time limit, doing outreach and social media, and then assessing your event.
**STEP 2**

**FIND A SITUABLE PLACE TO HOLD A PRESS EVENT**

Location, location, location! It is not only applicable in real estate, but also in campaigns. Find a place with access to facilities you need including power/electricity. Choose a nice backdrop that dramatizes your position. If you decide to keep it indoors, think through what reporters and media may need including lighting, microphones, Wi-Fi, and technical assistance. Location examples may include school auditoriums, business fronts, city hall, local parks, your chapter’s headquarters, or any space with a large visual in the background to demonstrate your brand.

**STEP 3**

**CREATE A CHECKLIST INCLUDING EQUIPMENT, MATERIALS, AND OTHER SUPPORT**

Think about your materials and equipment. These may include but are not limited to:

**Event Setup**
- Recruit two volunteers to help with set-up and logistics.
- Reserve space with electrical facilities nearby.
- Print and display large visuals, graphs, logos, and charts.
- Locate/bring power cords and microphones.

**Media and the Public**
- Provide sign-in sheets for journalists, reporters, and other media staff.
- Produce a press release, talking points, brochure, factsheet, or one-page summary reference sheet. (Your media friends will be happy.)

**Speakers**
- Invite two to three strong and charismatic speakers who can clearly illustrate:
  - Problem
  - Solution
  - Urgency
  - Call to Action
- Include a moderator to introduce the speakers.

**STEP 4**

**AMPLIFY YOUR MESSAGE ACROSS MEDIA, AND PITCH REPORTERS**

Think about how you want to convey your message to the media and to the public. Spark a conversation across social media platforms including Facebook, Twitter, and Instagram, as well as other media:

**For TV**
- Tell a visual story. Display posters and banners with your chapter or state office name. Have volunteers in the background to illustrate community power and consensus.

**For Radio**
- Find an area where you won’t be interrupted by loud background noise. Make sure to have sound bites prepared. Sound bites are one to two lines that nail your point.

**For Print or Online**
- Provide background materials like brochures, flyers, factsheets, or other sources to inform media staff about your campaign.

When pitching media make sure to be clear and courteous. Build a list of media outlets and call them one week in advance. If you have time, tailor the pitch to the reporter’s interests and recent writing to make them feel special.

**STEP 5**

**RUN THE PRESS EVENT AND SET A TIME LIMIT**

Arrive to your chosen location at least an hour ahead of time to set up equipment, lights, and any tables for registration and distributing materials. Your team should have at least two volunteers to help out with the event. Assign one of your volunteers to set up and break down the equipment, and assign another volunteer to sign people in and keep track of time. Each speaker should send their talking points in advance so you can provide input on the message and ensure all main talking points are hit. When you ask a potential presenter to join the event, make sure they know to keep their speech down to five minutes, if they agree to speak.
CAMPAIGN ADVOCACY MANUAL

SAMPLE MEDIA PITCH CALL

“Hi is [their name] there? Hi [their name], my name is [your name], and I’m a volunteer with Audubon [state] working to pass a 100% clean energy resolution here in our town. We’re hosting a press conference on [date] at [time] at [location] after the city council votes, to discuss what happened. We have a strong reason to believe council is going to unanimously pass this resolution, so this will be a historic event for the town. Can you make it?

Great! I’ll follow up again to make sure you have the details. What is the best email for you to send you information, including our press release after the event?

Thank you so much. We look forward to seeing you on [date] at [time] at [location].”

STEP 6
ASSESS IMPACT AND EVALUATE

Reflect on your event. How many people came? What did reporters say? Did you connect with them regarding next steps? Did you adhere to the time limit? Did your volunteers show up? Evaluate what could have been done better and what was done well. Make sure to track your media hits so you can share with other elected officials, fellow Auduboners, funders, etc. Celebrate this victory as not everyone can pull this off!! Don’t forget follow up and thank your supporters.

PITFALLS TO AVOID

1. Do not say anything you can’t back up with facts. Your campaign may lose credibility and confidence to deliver on its vision.

2. Do not bring up anything you are not prepared to discuss.

3. Do not forget to invite the media and hand out your press release.
House Overwhelmingly Passes Solar Access Act (SB 145)

Solar Access Act will create more local jobs, provide more options to consumers and is good for birds and the environment.

Little Rock, AR – Today the house passed the Solar Access Act (SB 145) 83 Yays to 5 Nays. The bill was introduced by State Senator Dave Wallace (R-Leachville) and State Representative Aaron Pilkington (R-Clarksville). It has gained a broad base of support ranging from companies like Walmart, Target, Mars & Unilever to the Arkansas Advanced Energy Association; from the Arkansas General Contractors Association to both the UALR Young Democrats and College Republican chapters. Support for solar also comes from some local favorite spots such as Damgoode Pies, Community Bakery, Stone Mill Bread, and Pack Rat Outdoor Center.

The bill will:
- Allow for third-party purchasing which allows a resident or business to host a solar energy system
- Increase the solar size limit
- Adds grandfathering provision to protect customers who adopt solar from future rate structure changes that would decrease the value of their investment

Senator Wallace applauded today’s house vote and said “Today is a great day for Arkansas and a big win for Arkansas consumer.”

“Today, marks a new path for Arkansas’s energy future. People and businesses alike have more options to support cheap, clean and environmentally friendly solar energy. This bill is a win-win and we look forward to working to build off this success in the future,” said Gary Moody, Interim Executive Director with Audubon Arkansas. “In Arkansas, we have the opportunity to be a leader in the solar industry and SB 145 is a step in the right direction. We want to thank Senator Wallace for introducing this bill and all of our members and volunteers for supporting this issue.”

Yesterday, dozens of Audubon members and supporters from across the state travelled to the Capitol to advocate for solar energy for Audubon’s Day at the Capitol. They delivered over 2000 petition signatures, over 60 local business sign ons, and sent in over 50 handwritten letters to the Governor all in support of the Solar Access Act.

Arkansas ranks 11th in the nation for its solar potential and nearly last in its infrastructure. Policies for solar in the Natural State have not been updated in nearly 20 years.

“It’s time that Arkansas gets up to speed,” said Lincoln Combs, an Audubon volunteer from Northwest Arkansas who met with his representatives yesterday. “As home to the first ever congressionally preserved piece of land and the first national river, Arkansas should be a leader on environmental issues, but we haven’t been. SB 145 is a great step in that direction.”

Over the last few months, Audubon Arkansas has engaged long-time and new members around Solar Access. As Audubon members, they want to protect habitat for birds and other wildlife. They see Audubon’s role in a clean energy future as vital to protecting key habitat for native species to be enjoyed for generations to come.


About Audubon

The National Audubon Society saves birds and their habitats throughout the Americas using science, advocacy, education, and on-the-ground conservation. Audubon’s state programs, nature centers, chapters, and partners have an unparalleled wingspan that reaches millions of people each year to inform, inspire, and unite diverse communities in conservation action. Since 1905, Audubon’s vision has been a world in which people and wildlife thrive. Audubon is a nonprofit conservation organization. Learn more at www.audubon.org
HOW TO BIRDDOG

Birddogging is showing up to a public event that your target is expected to attend and asking him or her a question that forces them to take a stance on an issue. This tactic serves three main purposes:

1. Inform the Public
   Birddogging is your megaphone. There will be a lot of people and reporters listening to the candidate and your question can challenge your target to think of an issue in a new way. The right question, asked through birddogging, may even make national news! This is your opportunity to tell everyone about your campaign.

2. Educate the Target or Elected Official
   Your target constantly hears from constituents and there are many issues they have to track. Be creative and tell them something they don’t know. Birddogging gets their attention and makes them want to learn more.

3. Make the Target Take a Position
   Targets, including legislators, are artful magicians of rhetoric and they will rarely say where they stand on an issue. Birddogging allows you to form questions that provoke a “yes” or “no”.

Similar to a town hall, this tactic shines most when coordinated with the media and when your target may be running for office or reelection. Social media can also be useful, especially if no traditional media outlets are present. This tactic relies on tenacious precision. Your team may have to be split in two or more groups so you have people positioned in multiple locations at different times around the event to intercept your target.

The goal of this tactic is to let your target know what you want them to do for you and your campaign. In approaching a target, you want to add pressure by asking them directly where they stand on the issue. The more your target receives questions about your issue, the more likely they are to provide a response on the record or take a position sooner rather than later.

TIPS FOR SUCCESS

1. Arrive early and figure out from where your target will be entering, where they’ll be on stage, to where they’ll be exiting, and where they are off to next.

2. Dress like the rest. Standing out from the flock may scare off your target from calling on you.

3. If you fail to ask your question, kick it up a notch! Find the target’s exit route and find an opening to shake their hand. Don’t let get the hand go until they answer your question, walk them to their car if you have to.

4. Have questions, a pen and paper, and a buddy to record your interaction with the target.

5. Share the news with the media.

STEP 1
RESEARCH YOUR TARGET’S SCHEDULE

Finding your target may sound easy, but it can take a lot of effort. Assign a team member to conduct research and look up your target’s public schedule. Use the Town Hall Project tool: https://townhallproject.com to look up an elected official’s next big fundraiser, town hall, reception, luncheon, or other event. Another way to find out where your legislator may be is by signing up for their newsletter. Additionally, you may want to call their office and/or check their social media channels. Set up a Google News Alert.
**STEP 2**

**CREATE A QUESTIONS SCRIPT**

Formulate a series of questions to ask your target. For more information, see the script below. What makes a good birddogging question? Use the following checklist:

**A Good Question**
- Focuses on a specific issue
- Puts the candidate on the spot
- Informs listeners including reporters

**An Even Better Question**
- Localizes the issue and makes it personal
- Applies candidate’s voting record, statements, and quotes
- Is concise

**Questions to Avoid**
- Softball questions, like “What do you think about...?”
- Loading a question with acronyms or technical jargon
- Rambling on and on.

**STEP 3**

**IF APPROPRIATE, CREATE SIGNS, BANNERS, AND OTHER VISIBILITY TOOLS**

How well do you know your target? Would visibility encourage or eliminate the chance of your target interacting with you? If appropriate, consider making yourself visible to your target at the birddogging event – go up to them in person, have signs, etc. There may be times your target intentionally ignores you and pretends that you don’t exist. In this scenario, visibility may make it harder for you to be ignored. It may also help to deliver a petition to your target in person.

**STEP 4**

**ATTEND AN EVENT AND DELIVER A DIRECT ASK**

Be an early bird. Arrive at the event and scope out the perimeter like a hawk. Anticipate from where your target may be entering, where they’ll be standing during the event, and to where they’ll exit afterwards. Get your team on the track to success by pairing each person with a buddy to document the conversation. When delivering the ask, assign your buddy to take pictures and/or video any interaction so your target’s comments are recorded. This is especially important if press aren’t in attendance.

**STEP 5**

**DEBRIEF**

Share what you’ve learned with your team. Post your recording or comments in your newsletters, alerts, and/or on social media using a campaign hashtag. Let your Audubon state and national offices know about your event. Did you succeed? Were you able to gain any new intelligence about your target’s position? If not, don’t give up! The more your target hears the question, the more likely they are to provide a response. Don’t forget to evaluate your own performance. Who asked the tough questions and was successful? Can you think of a new approach, frame, or point of view from which to ask the question?

**PITFALLS TO AVOID**

1. Do not arrive late.
2. Do not come unprepared.
SUMMARY:
Audubon is calling on city managers, mayors, and governors across the U.S. and every flyway to take a pledge to commit to clean energy by 2030. The pledge requires local and state elected officials to push for the elimination of fossil fuels including coal by 2025 and ensure all utility companies incorporate new renewable portfolio standards.

The questions below are best used at town halls, forums, and events. Engage your target at every opportunity. If you see an opening, ask them the tough questions. Don’t hold back; it may cost your campaign a chance to build momentum in the long run.

QUESTIONS:
• Will you take a pledge to commit 100% of your state to clean energy and phase out coal by 2025?
• What approach would you take to enhance or expand clean energy access to families and hardworking Americans?
• What will you do this year to combat climate change and create resilient communities?
• Can you promise me that you won't eliminate funding for solar energy programs?

RECOMMENDATION
Politicians are artful masters of rhetoric. They will try all they can to deflect, pivot, or reject an opportunity to provide a substantive response or commit to an action on record. It is recommended that your team spread out throughout these types of public events and follow your target responses from time to time. Know how your target might pivot if asked certain questions, know what you will say in response. Craft interesting questions that get straight to the point.

REMEMBER TO:
Capture the moment on video or audio. It’s critical! Buddy up and be prepared to have someone shoot video on their phone. Be ready to be on the move and walk with your target. Upload the video and share your interaction with the national office via campaigns@audubon.org.

SUMMARY ON TACTICS
We’ve outlined the core bread-and-butter tactics in this section that are foundational to any campaign. The best tactics are strategic, surprising, unique to the group, and have never been done before in that particular way. Be strategic, creative, bold, disciplined, and allow yourself to take calculated risks.

You may need to escalate to bolder tactics to take on bigger problems. As you become more sophisticated and experienced in your campaigning, you will become involved in larger issues. If you are successful, your local wins will translate to state victories; your state victories will start connecting to other advocates in other states and will become a national movement. This is how large marches, direct actions, sit-ins, boycotts, and other national-scale tactics that generate media attention and build lots of power get started.
Conclusion

This manual has laid out key foundational skills and best practices for running and winning issue campaigns at Audubon. From start to finish, we have outlined the fundamentals that will help you realize a better world for birds and people.

In Chapter One: Introduction to Audubon Advocacy and Campaigns, we shared the importance of shared values and campaign vision; a theory of change; understanding what power is, what it isn’t, different types of power, and why power matters in your campaign.

In Chapter Two: How to Launch a Campaign, we described what a campaign is; how to communicate your vision and connect it with a clear outcome; what a strategy chart is and how to use it; how to power-map a decision maker; and essentials for crafting a compelling campaign message.

In Chapter Three: Building Your Team, we highlighted strong relationships and community building as the foundation of winning campaigns; how to craft a Story of Self, Us and Now; we introduced recruitment as an effective engagement technique; how to build a team using leadership development; what a Snowflake Model is; and shared leadership principles to identify prospective leaders.

Chapter Four: Tactics & Timelines defined tactics; listed commonly used tactics; how to choose a tactic, and why they sometimes fail; adaptive strategies for when life happens and things change on the fly; and what an “ideal” textbook campaign timeline looks like from launch to evaluation.

In order to take on vast conservation issues impacting birds, we must keep these principles in mind. Although there is no substitute for real-world practice in organizing, we have tried to create a resource that can be used in the service of that work; that won’t stop us from experimenting and making mistakes, but instead help us to understand how to learn and grow from them with resiliency.

We are excited to see what you create. There are few things as beautiful as people realizing their collective power to change the world and shape their future. Now it’s time to roll up our sleeves, get to work, and build a movement for birds and people together.

When we organize, we take flight... and win.
Now that you’ve read through the manual, take a moment to reflect on where you are.

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CHAPTER 5

AUDUBON CAMPAIGN
ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird, Florida Scrub-Jay, Allens Hummingbird, Cerulean Warbler, Sandhill Crane
Glossary

Ally
An ally is a group or individual that cannot join your campaign, but supports your issue.

Ask
An “ask” is a specific request for action.

Audience
An audience is the group you are trying to recruit, work with, overcome, or speak to with your campaign. You can, and usually do have multiple audiences.

Birddog
Birddogging is showing up to a public event where your target is expected to attend and asking him or her a question that forces them to take a stance on an issue publically.

Campaign
A campaign is a series of tactical actions, guided by a strategic plan, that are enacted over a named period of time with a clearly defined victory or end point.

Constituency
A constituency is a community or group of individuals bound by a commitment to further a shared common goal.

Cover Strategy
A strategy focused on addressing the concerns of a target to vote a certain way.

Evaluation and Next Steps Stage
The period of evaluation, celebration, and preparation regardless of a campaign’s result (win or lose).

Foundation Stage
The foundation period is the start of your power-building activities.

Goals
Goals are a series of definable, achievable steps that get you closer to achieving your vision.
CHAPTER 5

Hero Strategy
A strategy focused on affirming or promoting a target’s power to lead on a specific issue.

Kick-off Stage
This period serves as the launch of your campaign and deadline for planning goals, strategy, and tactics, recruiting people to your cause, and confirming initial commitments.

Ladder of Engagement
A ladder of engagement is the process where individuals take on more responsibility with time, ultimately managing a high level of your campaign.

Legal or Regulatory Power
Legal or regulatory power is based on law and the courts and your ability to get involved in a legal battle.

Letter to the Editor (LTE)
A LTE is an opinion or statement sent to a newspaper that localizes and/or personalizes an issue.

Mountain-top Stage
The point where your campaign reaches maximum mobilization.

Opponent
An opponent is a group or organized people, often with money, who stand against what you want.

Organizational Considerations
Resources for your campaign including budget, staff time, volunteers, coalition members, etc.

Peaks Stage
A string of peaks function as tactical milestones with measurable outcomes.

Petition Drive
Petitioning is a tactic you use to generate widespread support of your issue to the target. A drive is a period of time in which you are actively gathering signatures.

Phonebanking
Phonebanking is a phone call between you (or a volunteer) and a current (or future) member of your campaign, discussing the issue you’re working on, and ending with an ask.

Political or Legislative Power
Political or legislative power is based in elections relative to your ability to unseat or keep the target in power through voting.

Power
Power is your ability to get someone to do something they otherwise would not have done.

Power-mapping or Power Analysis
An analysis that devotes itself to understanding power relationships including identifying who makes the decision, and how to change that decision.

Press Conference
A press conference is a high-level presentation of information to the media and the public—especially important when it comes to breaking or urgent news.

Press Release
A press release is a written communication that reports specific but brief information about an event, circumstance, or other happening that is provided to the media through a variety of means.

photo by:
National Audubon Society
Pressure Strategy
A strategy focused on building pressure through a series of tactics.

Recruitment
The process of bringing new individuals into your campaign.

Self-interest
Self-interest is how we perceive ourselves to be in relation to our community and others.

Script
A script is a specific, targeted message that you use to frame your ask during a one-on-one, a house meeting, or petition-gathering.

Snowflake Model
The Snowflake Model is a model used to distribute leadership opportunities to a group of committed individuals in order to make them increasingly effective, responsive, productive, and collaborative.

Story of Self
A Story of Self is your personal call to action and leadership as a result of facing a challenge. It also serves as a tool to practice communication and collaboration as you begin to structure your team.

Strategy
A statement that describes your big-picture plan to win.

Strategy Chart or “Campaign Framework”
An advocacy framework and planning tool used to make campaigns meaningful, strategic, and realistic.

Sweet Spot
The ideal area you want to be in a campaign where strategy, strength, and individual development converge.

Tabling
Tabling is a campaign activity that involves setting up a table at an existing event and requires you to talk to attendees to gather names, signatures, and other contact information.

Tactics
Targeted actions designed to build and demonstrate your power. Tactics demonstrate your growth, and advance your goals by applying pressure to a target. They must be done BY someone, TO someone.

Target
A target is the decision maker who has the power over whether your goal is met or not.

Theory of Change
A “theory of change” in the campaign context is how and why you think you’re going to win.

Tuckerman’s Team and Group Development Model
The four stages of group development are:

1. Forming
The first stage of Tuckman’s Team and Group Development Model. Team members are positive, polite, and conflict-averse.

2. Storming
The second stage of Tuckman’s Team and Group Development Model. Team members experience conflict with work styles, personalities, or lack of agreement.

3. Norming
The third stage of Tuckman’s Team and Group Development. Team members set standards and expectations while developing trust and support for each other.

4. Performing
The fourth stage of Tuckman’s Team and Group Development. The completion of tasks leads to constructive action and creative solutions.

Vision
A clear statement describing the future that you want to live in and are working to create.
APPENDIX A:

Theory of Change for Advocacy Campaigns

WHAT IS A THEORY OF CHANGE?

A theory of change is how and why we think we’re going to win. A theory of change must answer these questions:
What change do you want to effect? How will you do it? Why do you think it will work?

A Theory of Change should be:

Plausible
Your evidence should be logical and well understood.
Your strategies and tactics should give you what you want, or at the very least get you closer to your goal.

Doable
You should have given yourself enough time to achieve your goal. These goals should be aggressive, but realistic.

Testable
You should be able to test your hypothesis, track your progress, and evaluate the impact of your activities.

GETTING STARTED

In order to launch a successful campaign, you need to be able to state clearly why the plan you’ve established can reasonably result in a victory. This is your theory of change. If you are unable to describe why you believe your plan will work, your campaign will struggle to retain volunteers, convince your targets, and ultimately, will affect your ability to create change. It is that important. As you work on your chapter or group’s theory of change, spare no detail. Your theory of change should address some parts, if not all, of the following considerations:

1. What issue is your group, chapter or state office addressing?
   Define the scope and scale of the need for the issue.

2. What is your desired outcome?
   Understand what success or failure looks like to you.

3. What values do you, your partners, and your allies hold about the issue?

4. What strategies are already planned or in place now to address the issue?

5. How might you revise your theory of change if your fundamental understanding of the issue changes?
### Theory of Change Worksheet

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<td><strong>CHANGE STATEMENT</strong>: In one or two sentences, using the “if/then” construction, describe your theory and what needs to happen in order to fulfill the purpose of your campaign.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHY IS THERE A NEED FOR CHANGE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bullet the reason(s) why the change must occur and for whom.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT ARE THE KEY BARRIERS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bullet social and environmental factors including political, economic, and cultural that might impede the change you seek to implement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOW DO YOU PLAN TO SUPPORT YOUR EFFORT(S)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What resources do you have? Time, volunteer hours, money, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IMPACT STATEMENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>In one or two sentences, describe the outcome you expect as a result of your effort. Be realistic.</td>
</tr>
</tbody>
</table>
APPENDIX C:

Strategy Chart or Campaign Framework Planning Tool Worksheets

CAMPAIGN FRAMEWORK PLANNING TOOL WORKSHEET

**STRATEGY**: In one to two sentences, develop a summary of the strategy for your campaign. What is your plan to win?

<table>
<thead>
<tr>
<th>GOALS</th>
<th>ORGANIZATIONAL CONSIDERATIONS</th>
<th>DECISION MAKER (TARGET)</th>
<th>POWER ANALYSIS</th>
<th>TACTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>LONG-TERM</td>
<td>RESOURCES</td>
<td>TIER 1 TARGETS</td>
<td>OPPONENTS</td>
<td>ACTIONS</td>
</tr>
<tr>
<td>What do you really want?</td>
<td>Determine key roles, what assets you have, what assets you will need, your budget, and any planned partner activities.</td>
<td>List the names and titles of the decision maker who can get you what you want.</td>
<td>Identify two to three (or more) opponents who will devote resources to ensuring your campaign does not win.</td>
<td>Identify specific actions planned for the campaign and done to the target, in alignment with strategy.</td>
</tr>
<tr>
<td>Your vision.</td>
<td></td>
<td>TIER 2 TARGETS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INTERMEDIATE</td>
<td>ORGANIZATIONAL GAINS</td>
<td>TIER 3 TARGETS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The campaign goal. (Note there can be multiple intermediate goals to achieve your long term goal).</td>
<td>List three to five measurable outcomes that will grow out of the campaign. For example, increased # of activists, members, enhanced reputation, new donors, etc.</td>
<td>List the names and titles of the individuals who can influence your Tier 2 targets to get you what you want.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SHORT-TERM</td>
<td>INTEGRAL CONSIDERATIONS:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A step towards achieving the intermediate goal.</td>
<td>Determine three to five problems, tensions, areas of concern, or possible conflicts that may constrict the campaign. Determine your plan to address and by what date.</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Campaign Framework Planning Tool Worksheet

**STRATEGY:** In one to two sentences, develop a summary of the strategy for your campaign.

<table>
<thead>
<tr>
<th>GOALS</th>
<th>ORGANIZATIONAL CONSIDERATIONS</th>
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<tbody>
<tr>
<td>LONG-TERM</td>
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</tr>
<tr>
<td>INTERMEDIATE</td>
<td>ORGANIZATIONAL GAINS</td>
<td>TIER 2 TARGETS</td>
<td></td>
<td>CONSTITUENTS</td>
</tr>
<tr>
<td>SHORT-TERM</td>
<td>INTERNAL CONSIDERATIONS</td>
<td>TIER 3 TARGETS</td>
<td></td>
<td>COALITION PARTNERS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ALLIES</td>
</tr>
</tbody>
</table>
Power-mapping is an analysis that devotes itself to understanding power relationships including identifying who makes the decision (on your campaign goal), and how to change that decision. We may know exactly who our decision maker is, but we may not know what moves them to take action. That is the purpose of power-mapping. Through this process, you will figure out some of the exact ways that make it easier for your decision maker to say “yes” to a campaign goal.

**THE POWER MAP**

We use advocacy to generate the change we want to see. Using our power analysis to understand our social, environmental, political, and economic landscape, we will:

- **Build power**
  - Show strength and growth by the numbers (offline and online).

- **Apply pressure**
  - Target decision makers in tactical ways.

- **Practice persuasion**
  - Engage in daily discussions to promote the change we want.

**GETTING STARTED**

With your team, start by drawing a circle in the center of a blank piece of paper or on a board. At the top of the paper, clearly state your goals as they relate to a specific decision maker. For example, we want to pass 100% clean energy resolution in our [insert city, insert state] by getting the mayor to vote in favor.

Inside the circle, jot down the name and title of the decision maker(s) you want to get to a “yes” decision. In the above example, your main decision maker is the mayor. But for other campaigns, it could be someone else. Does the decision fall on the board of education, a city commission on public health, the public utility commission, the mayor, a legislator on the budget committee, or governor? What do you know about this person? Who influences them?

Begin fleshing out their influences. An influencer is a person related, in some way, to your decision maker. They typically are your Tier 2 targets. The assumption is that this person will have influence over your target. Does their spouse influence them? If so, write their name under personal influences. Research their spouse. Do you have any connections to him/her? Do any of your partners have connections? How can you find out more about this person?

Is your decision maker religious? If so, put a faith leader (or person within the faith) in the personal influences box. Again, ask yourself, do you have any connections to this person of faith? Do your partners? Do they have any reasons to support your issue? Any reasons to oppose? And so on. Continue to flesh out your the influencers until you feel confident that you know how to get your decision maker to do what you want them to do [campaign goal].
APPENDIX E:

Power Map Worksheet

Use this space to match your issue with a decision maker.
APPENDIX F:

Ladder of Engagement Worksheet

chart adapted from:
Marshall Ganz,
Harvard University
APPENDIX G:

Snowflake Model Worksheet
# APPENDIX H: Target Strategy Worksheet

## YOUR TARGET STRATEGY

<table>
<thead>
<tr>
<th>TACTICS</th>
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</thead>
<tbody>
<tr>
<td><strong>YOUR TARGET STRATEGY</strong></td>
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</tbody>
</table>

- **CHOOSE YOUR STRATEGY (HERO/COVER/PRESSURE):**

- **LIST OUT YOUR TACTICS:**
# Appendix I: Developing Your Campaign Timeline Worksheet

<table>
<thead>
<tr>
<th>Campaign Timeline</th>
<th>Activities</th>
<th>Your Metrics for Success</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MONTH</strong></td>
<td><strong>ACTIVITIES</strong></td>
<td><strong>YOUR METRICS FOR SUCCESS</strong></td>
</tr>
<tr>
<td></td>
<td>Identify two to three activities planned for the month and indicate which team or individual is responsible for each task.</td>
<td>List two to three key performance indicators including # of people engaged, conversion to memberships, petition signings, bills introduced, etc.</td>
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**CAMPAIGN TIMELINE**

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<th>ACTIVITIES</th>
<th>YOUR METRICS FOR SUCCESS</th>
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</tbody>
</table>
CHAPTER 5

TAB PHOTO CREDITS:

Golden-Winged Warbler
   Photo: Ami Stinnissen/Audubon Photography Awards
Black-Throated Blue Warbler
   Photo: Lorraine Minns/Audubon Photography Awards
Anna’s Hummingbird
   Photo: Douglas Croft/Audubon Photography Awards
Florida Scrub-Jay
   Photo: Dawn Currie/Audubon Photography Awards
Allens Hummingbird
   Photo: Brad Lewis/Audubon Photography Awards
Cerulean Warbler
   Photo: Charlie Trapani/Audubon Photography Awards
Sandhill Crane
   Photo: Barbara Ponder/Audubon Photography Awards
Arctic Tern
   Photo: Judith Wilson/Audubon Photography Awards

Select Icons
   The Noun Project
Designed by
   General Design Co.
CHAPTER 6

AUDUBON CAMPAIGN
ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler, Black-Throated Blue Warbler, Anna’s Hummingbird, Florida Scrub-Jay, Allen’s Hummingbird, Cerulean Warbler, Sandhill Crane, Arctic Tern