



## WELCOME TO YOUR FIELD GUIDE FOR CHANGE

### AUDUBON CAMPAIGN ADVOCACY MANUAL

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

# Campaign Advocacy Manual

## TABLE OF CONTENTS

<b>Introduction .....</b>	<b>01</b>
Acknowledgements .....	01
Welcome .....	01
Audubon's Vision.....	02
Audubon Conservation Priorities.....	03
On Equity, Diversity, and Inclusion .....	03
Overview of this Manual .....	04
 <b>Introduction to Audubon Advocacy and Campaigns .....</b>	 <b>06</b>
Our Values .....	06
Our Theory of Change .....	07
Campaign Vision .....	08
Power .....	09
Different Types of Campaigns .....	10
Education vs. Influence vs. Power .....	11
Summary.....	11
 <b>How to Launch A Campaign .....</b>	 <b>13</b>
Creating a Vision.....	14
Fundamentals of Winning Campaigns.....	15
Power Analysis .....	20
Message Development.....	23
 <b>Building Your Team .....</b>	 <b>28</b>
Story of Self, Us, and Now .....	29
Recruitment.....	31
Team Building .....	36
Inclusive Recruitment.....	40
Leadership .....	41

**BY:**  
**National Campaigns Team**

<b>About Tactics .....</b>	<b>45</b>
What Are Tactics.....	45
Choosing a Tactic.....	47
Being Strategic.....	50
Campaign Timelines .....	50
<b>Guide to Tactics .....</b>	<b>56</b>
Hosting a Bird Tour .....	56
Educational Events.....	60
Letters to the Editor.....	63
Signature Collection Drives .....	66
Special Focus: Tabling.....	70
Meeting with a Legislator.....	72
Media Outreach.....	79
<b>Conclusion.....</b>	<b>84</b>
<b>Glossary .....</b>	<b>87</b>
<b>Appendices .....</b>	<b>90</b>
Appendix A: Theory of Change Worksheet.....	91
Appendix B: Strategy Chart .....	92
Appendix C: Power-mapping Exercise.....	94
Appendix D: Target Strategy Worksheet .....	96
Appendix E: Example Field Plan .....	97
Appendix F: Ladder of Engagement Worksheet .....	99
Appendix G: Tabling Checklist.....	100
Appendix H: Educational Event Checklist .....	101
Appendix I: Sample Sign-in Sheet.....	102
Appendix J: Media Planning Template.....	103

# Introduction

01

## 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 Lab, 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 long-term victory 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

### TAKE NOTE

Feel free to highlight, make notes, scribble in the margins, and make this book yours.

**photo by:**  
National Audubon Society



## 02

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. And 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 got us there. 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 one before. 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.

**Ultimately,  
solutions are  
going to come  
from people  
like you.**

## FOUR PILLARS FOR CHANGE

### 1. Durable Public Will

Building political power and getting someone in power to consistently support issues they may not otherwise 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 address 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.

While addressing all of these priority topics are essential to protect birds and the places they live, Audubon's Survival by Degrees report shows that climate is the number one threat to birds. Our climate program focuses on what we need to do in order to hold global warming to 1.5C or lower.

## ON EQUITY, DIVERSITY, AND INCLUSION

Audubon is focused on building a lasting movement that can support and welcome all people. In addition to our pillars of change and policy priorities, we are committed to the principals of equity, diversity, and inclusion. Making sure that Audubon chapters and advocacy campaigns are accessible, welcoming, and supportive to people of all races, ages, physical abilities, gender identities, income levels, and other groups is a priority. Make sure that as you develop your campaigns, they are welcoming to all, supporting justice work, and that you are thinking through how to be an anti-racist organization. Which organizations you partner with, where your meetings are located, how and where you advertise, whether everyone feels included and welcome at meetings, these are all pieces to consider to be an anti-racist organization.

## 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 focus on how to build your campaign brick by brick. We'll talk about how to set goals and build out your vision, create a winning strategy, do the right research, and make your campaign plan.



### CHAPTER 3

Here we'll focus on building your team. A campaign depends on building and demonstrating power, and that means bringing people together throughout the community.



### CHAPTER 4

This section will look at how to identify and create winning tactics. This is the finishing piece of your campaign, and tactics always come last, rooted in your vision, goals, strategy, and plan.



### CHAPTER 5

In Chapter 5, we'll really dig into some of the most effective tactics and how to execute them well for your campaign. This isn't every tactic you can do, but it will get you started!





CHAPTER

1

INTRODUCTION TO AUDUBON ADVOCACY

AUDUBON CAMPAIGN  
ADVOCACY MANUAL

**Birds Pictured:** Golden-Winged Warbler, Black-Throated  
Blue Warbler, Anna's Hummingbird




## 09

- Audubon values equity, diversity, and inclusion. From our EDI guide for chapters, we believe that “the diversity of human experience strengthens our conservation efforts for the benefit of nature and all human beings.”
- We value birds and birding, and believe that birding should be accessible to and enjoyed by all people, regardless of age, income, race, ethnicity, physical ability, or language.
- Audubon values the work of grassroots leaders and

Luke Franke/Audubon



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

- We value all communities and want to ensure that we protect birds and the places they live, fight climate change, and conserve nature without pushing the cost onto marginalized communities.

[illegible]

**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.

*For additional Theory of Change guidance, see Appendix A.*

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.

A young child with curly hair is holding a large white sign. The sign features the text '#VoteForSolar' in a large, bold font. To the left of the text is a Facebook logo, and to the right is a clock icon with the number '17'. Below the text, there is a photograph of the same child. The sign is being held up by two adults, whose hands are visible at the top and sides. The background is slightly blurred, showing an indoor setting with other people and a wall-mounted screen.

2. How will you do it?
3. Why do you think it will work?

[illegible]



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

## 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?

The first Audubon societies formed because they saw birds were being slaughtered and threatened with extinction for the fashion industry and hat trade. Because people who loved birds organized, they helped create some of the first wildlife refuges in the United States, and some of our earliest conservation laws, such as the International Migratory Bird Treaty, and the Migratory Bird Treaty Act in the U.S. They had a vision of a world where people protected birds and their habitats, and they made it a reality.

Similarly, beginning in the 1960s, people had a vision of an America where we protected birds and species, where we had clean, breathable air, drinkable water, and corporations could not poison animals, plants, or the soil without consequence. Through the environmental movement they created the Clean Water Act, the Clean Air Act, and the U.S. Environmental Protection Agency, as well as numerous other “smaller” legislative victories at the national, state, and local levels.

Creating enduring change isn't easy; nothing worth doing ever is. It takes a lot of work, and often it feels like two steps forward and one step back, but having a vision can help to carry you through. Your vision does not need to be a specific policy, but it should be the ideal that motivates you: a vision of a world where everyone has access to the outdoors and nature; a vision of a world where your children and grandchildren can enjoy the same bird species you know and love; a vision of a world where we design our cities to support the climate and fragile species.

Audubon's vision is that we can create a world that protects birds and the places they live, that supports conservation and communities, and a world that has bipartisan support for science-based policies that will keep global warming at or below 1.5°C.

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

[illegible]

## 09

## POWER

Power is one of the most important concepts we discuss when we talk about creating change. And when we discuss power in campaigns and organizing, it means something very specific. **Simply put, power is the ability to get your target to support your work if they would not do so otherwise.**

Breaking that down, if you can convince your target to change their vote from no to yes—or yes to no—that is power. You might need power when:

- a. Your target agrees but says this work isn't a priority.** If they say they won't support this until other work is taken care of—and in state legislatures with short sessions this may mean it isn't supported at all—then you need to have power to convince them this is important.
- b. Your target agrees but says they can't support your bill.** If your target says they agree, but for political reasons can't vote for what you want, they are responding to another organization's power. You need to build power to support the target in voting for your issues.
- c. Your target doesn't agree with you.** If your target doesn't agree, you need enough power to show that their constituents care and it is still important to vote for your issues. It is okay if they still don't agree with everything you say, if they do agree to vote the way you want.

In our current system, power can come from organized people or organized money. But even those who have money are trying to use it to persuade more people—the voters. Grassroots organizing aims to build support in the community and organize the power of people. Think about the first campaigns of the Audubon Society, to fight for the protection of endangered tropical and subtropical birds used for fashion. In order to get legislative protections and push decision makers to support the Migratory Bird Treaty Act (MBTA), we built a powerful campaign involving thousands of individuals and chapters across the country pushing for change. Our theory of change here was that if we could show up in bigger, louder numbers than the fashion industry, if we could pull more people into our cause and show our elected officials this was important to their constituents, they would vote for the MBTA.

Today the law has saved millions, if not billions, of birds. In order to make the drastic changes we need to address climate change, pass the new laws we need for bird-friendly communities, and conserve land and water to protect birds and the places they need now and into the future, we must demonstrate to the decision makers that we are going to show up and we have the power—votes—that they need.

Building power can be challenging and uncomfortable when we do it for the first time. However, we know from experience that building power is the most important step for long-lasting change. This manual will help give you the steps you need to build power, demonstrate your power, and win on the issues you've identified.

**Remember—if we have true power, we can use our power no matter who holds the office. Our issues will still be a priority in the region.**

DIFFERENT TYPES OF CAMPAIGNS

This manual focuses on issue-based policy campaigns. However, that is not your only option when it comes to making lasting change. You and your group may realize you need to launch a regulatory or legal challenge. You may have a corporation you need to target. While some of the information changes depending on the type of campaign and type of power you need, many of the core concepts in running an issue campaign can translate to other types as well.




		
FORMS OF POWER	WHAT MATTERS	CAMPAIGN TYPE
LEGISLATIVE (BALLOT)	YOUR ABILITY TO IMPACT VOTERS ON AN ISSUE	ISSUE CAMPAIGN
CONSUMER	YOUR ABILITY TO AFFECT PROFITS	CORPORATE
LEGAL OR REGULATORY	YOUR ABILITY TO ENFORCE LAWS	LEGAL
DISRUPTIVE	YOUR ABILITY TO STOP AN INSTITUTION FROM WORKING	DISRUPTIVE
ELECTORAL	YOUR ABILITY TO GET THE ELECTORATE TO VOTE FOR YOUR CANDIDATE	POLITICAL

chart adapted from:  
Midwest Academy

[illegible]





CHAPTER

2

HOW TO LAUNCH A CAMPAIGN

AUDUBON CAMPAIGN  
ADVOCACY MANUAL

**Birds Pictured:** Golden-Winged Warbler, Black-Throated  
Blue Warbler, Anna's Hummingbird, Florida Scrub-Jay



# How to Launch A Campaign

## INTRODUCTION

To make a difference that stands the test of time, you'll need to build and sustain your power for the long haul. That means running strategic and focused campaigns that expand your support in the community.

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 from all around the community together for the greatest possible impact.

In this chapter, we'll walk you through how to research your community and write a campaign plan as we build on your vision, values, and theory of change from Chapter 1.

### Section 1: Creating a Vision

Talks about how to create a campaign vision to sustain your work and inspire others in the community.

### Section 2: Fundamentals of Winning Campaigns

Introduces you to the most important piece of an Audubon campaign: the campaign strategy chart. We'll explain the what and why of the campaign strategy chart, and how you can use it to guide your campaign.

### Section 3: Power Analysis

Tells you how to research your targets and community to create a power map to guide your tactics and recruitment.

### Section 4: Message Development

Illustrates how to create a strong campaign message to inspire and recruit from the community.

The more solid your planning and research, the higher your chance of success. Whether you're state office staff, a chapter leader, or a new volunteer, and no matter your resources, the success of your campaign depends on how well you translate your vision into 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 on the one created by the Midwest Academy, a 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 take action that will determine your success.

**photo by:**  
Luke Franke/Audubon



## CREATING A VISION

Use our prompt to the side to create your own vision statement as a chapter. And then let's take that vision statement to our next section, creating a winning campaign.

## YOUR VISION

[illegible]



## SECTION 2

### FUNDAMENTALS OF WINNING CAMPAIGNS

In this section, we'll look at how to start putting together a campaign, from identifying an issue, to executing a plan, to winning. To do this, we'll break down a campaign strategy chart in detail. You can also watch our past webinars explaining these charts at [audubon.org/findyourflock](https://audubon.org/findyourflock).

But first, let's define what a campaign is.

**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 campaign is not a vision, although it should be guided by your group's vision. It is not a values statement, although it should align with your values. A campaign is *time-bound*, has one or more clear *targets*, and is *winnable*. A campaign is also an activity you undertake when you *need* to demonstrate and exercise power. If you have strong allies on the city council, support in the community, and the bill is highly popular, you may not need to run a full campaign. Especially for local issues, you may just need to educate the community on the issue and then ask.

But when your influence isn't enough, when there isn't enough support in the community, when there are others with power fighting against the goals you have set, then you need a campaign to get someone to do something that they otherwise would not have done.

#### **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 expected in the next legislative session. In the meantime, you have heard that the developers pushing for the boundary modification have been advertising in the community and the refuge is at risk. What do you do?

To save the refuge, you need to build and demonstrate power. You need a campaign.

Let's look at how we put one together.



### A WINNING CAMPAIGN INCLUDES:

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.

## CREATING A CAMPAIGN PLAN

For all of our campaign plans, we use this *strategy chart* to make sure our campaigns are meaningful, strategic, and realistic. The strategy chart provides a framework to draw out exactly how we're going to turn our vision into reality, and it keeps us organized and on track no matter what is thrown at us.

You can find a copy of the Strategy Chart in Appendix B. To create your chart, set up a time and place for your team to meet. Make sure you have all of the research materials you will need, display the chart in the front of the room, and then start filling the chart out in order. Please note that this chart goes from top to bottom, then left to right; the columns are what organizes your information, the rows don't need to line up.

**Don't have a team? Don't worry! Fill out what you can by yourself and then read about recruitment in Chapter 3.**

### Some things that you will want to have studied and have on hand:

- A map of the area/city/district in which the campaign will take place
- Results from at least one previous election of the decision maker
- A list of your own connections, family members, chapter board members and affiliates
- A sense of your total budget (it is ok if it is \$0!)
- A list of potential and current allies
- A list of potential and current opponents

## STRATEGY CHART

CAMPAIGN FRAMEWORK		SEE APPENDIX B		
<b>STRATEGY:</b> <i>In one to two sentences, develop a summary of the strategy for your campaign. What is your plan to win?</i>				
GOALS	ORGANIZATIONAL CONSIDERATIONS	DECISION MAKER (TARGET)	POWER ANALYSIS	TACTICS
<b>LONG-TERM</b> <i>What do you really want? Your vision.</i>	<b>RESOURCES</b> <i>Determine key roles, what assets you have, what assets you will need, your budget, and any planned partner activities.</i>	<b>TIER 1 TARGETS</b> <i>List the names and titles of the decision maker who can get you what you want.</i>	<b>OPPONENTS</b> <i>Identify two to three (or more) opponents who will devote resources to ensuring your campaign does not win.</i>	<b>ACTIONS</b> <i>Identify specific actions planned for the campaign and done to the target, in alignment with strategy.</i>
<b>INTERMEDIATE</b> <i>The campaign goal. (Note there can be multiple intermediate goals to achieve your long term goal).</i>	<b>ORGANIZATIONAL GAINS</b> <i>List three to five measurable outcomes that will grow out of the campaign. For example, increased # of activists, members, enhanced reputation, new donors, etc.</i>	<b>TIER 2 TARGETS</b> <i>List the names and titles of the individuals who can influence your Tier 1 targets to get you what you want.</i>	<b>CONSTITUENTS</b> <i>Identify your target group, community, or people who can join as members in support of your campaign.</i>	
<b>SHORT-TERM</b> <i>A step towards achieving the intermediate goal.</i>	<b>INTERNAL CONSIDERATIONS:</b> <i>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.</i>	<b>TIER 3 TARGETS</b> <i>List the names and titles of the individuals who can influence your Tier 2 targets to get you what you want.</i>	<b>COALITION PARTNERS</b> <i>List three to five or more coalition partners that you plan to coordinate with around the issue.</i>	
			<b>ALLIES</b> <i>List three to five (or more) partners that will not join your campaign through a coalition but may demonstrate support for the issue.</i>	

## 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 is clear, measurable, and winnable. In many issue campaigns, this means that a public vote will either grant or deny you your goal, although at times it may be an executive order or declaration. If there is no public policy decision, then it is an objective and belongs in the *Organizational Considerations* column or your tactics and field plan. (More on these later.)

### Not a goal

Keep birds safe in Herontown. This is a vision. Your goal should be HOW you will achieve your vision.

### Not a goal

Build a coalition of 200 businesses. This is a tactic, it moves you towards your goal.

### A goal

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



**photo by:**  
Lauren McCullough/Audubon



## 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 our state carbon-free by 2035.

### 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 in the next two years.

### 3. SHORT-TERM

These are the first goals you must win before reaching your intermediate goals and are usually achievable in six months to a year. Example: Pass 10 local resolutions creating plans for municipalities to become carbon-free over the next 12 months.

You may make a strategy chart for each of your short-term goals. Often, a long-term goal will have one or two short-term or intermediate goals building up to the final goal. You don't have to accomplish everything at once, but you should make sure your short-term and intermediate goals are getting you closer to the long-term one.

As you plan your goal, also remember that your goal is what you will win. Recruiting, fundraising, or educational tactics are what you need to do to win. For instance, getting 10 new volunteers to support your group, chapter or state office is important, but it is not your short-term campaign goal—you cannot win volunteers, there is no public vote or decision point, and it does not in and of itself achieve your vision. It is important, though, so getting 10 new volunteers will go in your *Organizational Considerations*.



### COLUMN TWO: ORGANIZATIONAL CONSIDERATIONS

The Organizational Considerations column is where you list the resources you have, and the resources you need for your campaign. These include investments, money, volunteers, and staff. Know what resources you currently have, what resources you need, when you need them by and how to get them.

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? Do you need to engage 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 affect your group, chapter, or state office's ability to run it 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 the power over your goal.**

In an issue-based campaign, a target is always a person and almost always an elected official. This column must include the names of elected officials or people in power who preside over a governing body such as a city council, state legislature, education board, water district, or public utility commission. 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** target is who will ultimately decide if your campaign succeeds or fails
- **A Tier 2 (or secondary) target** has more power than you do to influence your primary target
- **A Tier 3 (or tertiary) target** : has more power than you do to influence your secondary target

You can keep going down as needed, but most campaigns, especially local, will not go past Tier 3 targets.

If they are elected to their position, your target is almost always influenced by votes, money, and their public image. You can gain power over your target when you control enough of one or more of these factors. Can you credibly threaten to take away their votes, or guarantee to turn out votes? Can you show them you are able to strengthen or weaken their public image? Can you impact their fundraising? These are all dynamics that move legislators.



*photo by:*  
National Audubon Society

#### COLUMN FOUR: POWER ANALYSIS

Successful campaigns are all about building and demonstrating power to your target. An effective campaign knows who your target listens to, and what other organizations will be involved in this campaign. We'll cover the power analysis and power-mapping in-depth in section 3 of this chapter, because getting this right is so important. For completing this section of the chart, though, a winning campaign will know which organizations are opposed to your work, which organizations will support your campaign, and the people you can count on to participate in tactics and make the campaign successful—your constituents. And, importantly, which individuals and groups your targets listen to or have power over.



#### COLUMN FIVE: 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 read the guidance in Chapter 4 on how to choose the tactics best-suited for your campaign.


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 should either build or demonstrate power, and not just be done for symbolic purposes. We have seen many great campaigns fail because the tactics did not move the target closer to a goal, failed to build the necessary power, or were aimed at someone who wasn't the ultimate decision maker, and so was not the right target.

---

**photo by:**  
Luke Franke/Audubon

## POWER ANALYSIS

Some ideas are looking through old committee meetings or council meetings from the group that will be making the decision, looking at newsletters of organizations and community associations in your area, and researching politicians. You can also try to look up the issue or related topics in local news sources or talk to engaged leaders. There are many ways to get this information, so think creatively and know that there might be some research up front.

 Use this space to think through all the impacts of your campaign goal and who will be your allies and opponents

[illegible]

## 1

**IDENTIFY YOUR OPPONENTS**

An opponent is an individual or group of organized people who are actively working against your goals.

Questions to help you identify your opponents:

- Who is likely to disagree with our goal?
- Why do they oppose the issue? How does our goal go against their interests?
- Which groups/individuals have been against similar issues in the past?

Be sure to keep an open mind, do your research, and think clearly and honestly about this. You will not have the same list of opponents and allies for every campaign. A hotel association may support a bill that would preserve clean water and healthy beaches, but oppose a mandate that would cost money for bird-safe windows. An outdoors recreation group interested in climate change may support an ordinance for the city to become carbon neutral, but oppose a bill that would limit bike trails in an important nesting area. Don't be afraid to change this if you need to if the situation changes during your campaign.

## 2

**IDENTIFY YOUR CONSTITUENTS**

This is the community you can count on joining your group or chapter as part of a campaign; who you are representing when you end up meeting with an elected official or testifying at a council meeting. For Audubon, this is most likely your chapter members, but you may also gain a list of people who are joining you for this campaign. And if that happens, you'll want to convince them to join your chapter in the future as well!

## 3

**IDENTIFY POTENTIAL PARTNERS /COALITION**

Partners are organizations who are completely on board with the goal of your campaign, closely aligned with your vision and theory of change, and will coordinate with you on tactics and your issues. There may be an existing coalition that you are part of or want to join, or you may create one just for this issue. But whether this is for the campaign or the long term, make a list of your closest partners.

## 4

**IDENTIFY YOUR ALLIES**

Allies are organizations who have a similar goal for this campaign, but may not agree with the larger mission of your chapter, or disagree on your theory of change. You will not be planning all of the activities with them, but will likely be in touch and may plan activities. Similar to listing opponents, think honestly and creatively here. Organizations who may normally be either opposed or disinterested may become allies for a campaign. Audubon Arkansas was able to ally with WalMart on a campaign to expand solar access. A local astronomy club may support a campaign to have dark skies during migration. Non-traditional or unexpected allies can be a huge boost to a campaign

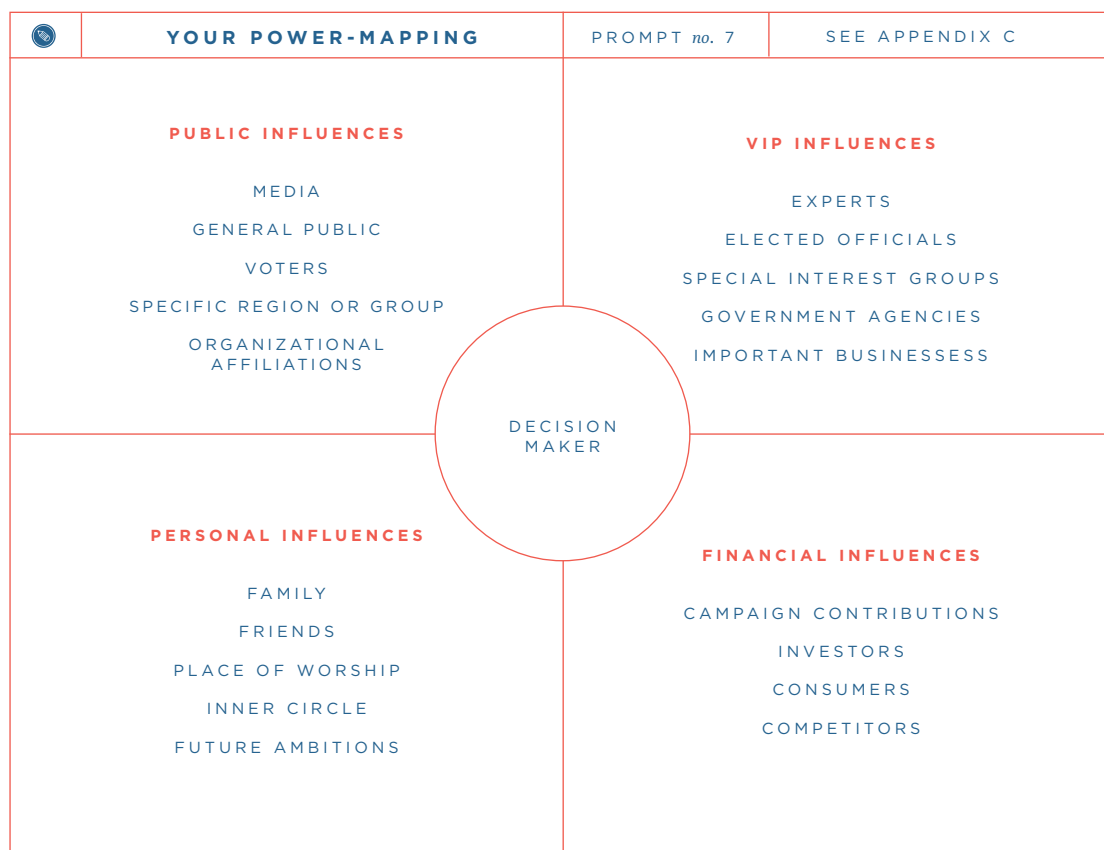
You need to know who will support or oppose you in the community, but you also need to know who your target—or targets—listen to. Who has influence or power over them? Which organizations are they a part of? Who is their constituency? That is, who do they count on for votes? Who do they count on for donations? And, importantly, what are your relationships with these influences and power centers?

### TO USE THIS POWER MAP:

1. Put your target in the center—do a different power map for each target
2. Write down the organizations or people that belong in each square—public, personal, financial, and VIP
3. Circle the ones with the *most* influence or power
4. Star the ones you have access to
5. Look over the list and brainstorm ways to increase the number of stars

*You can find a blank power-mapping exercise sheet in Appendix C.*

Using the directions above, complete this power-mapping chart



## SECTION 4

### MESSAGE DEVELOPMENT

Now that you have a general strategy chart, you need to think about how you'll communicate with your constituents, with your targets, and with the general public. By thinking comprehensively about your communications strategy, you better ensure that these tactics are in line with your overall strategy. We often end up pursuing media for media's sake, so reference your strategy often and be sure that the interviews you do, press releases you send, and tweets you draft are truly advancing your campaign goals—not just getting your chapter more followers on social media or getting your chapter president on TV.

Charting the messages, content, and tactics out in advance also ensures everyone is “singing from the same hymnal” from the very start, and gives you the chance to plan and complete most of the work ahead of time. For example, if you know you're going to need a press release for a City Council vote, you can draft it before your campaign even launches. That way, in the swirl of the campaign when the vote happens, you only need to add the details—the vote count, the names of council members you want to thank for their leadership and support, etc. Now let's look at how to put this together.

---

**photo by:**  
Luke Franke/Audubon





## THINKING THROUGH A CAMPAIGN COMMUNICATIONS PLAN



### 1. OVERVIEW

**A quick summary of your campaign goals and strategy, taken from your strategy chart.**

*This year, Buntington Audubon will organize our community to ensure the Longspur City Council passes a climate resolution.*



### 2. COMMUNICATION GOALS

**What will your campaign communications DO, and what is the priority?**

*Our primary goal is to inform Longspur residents, Chapter members, and key decision makers about the climate resolution and convince them to act on the climate now and in the long term. We will design community-facing communications with focus on taking action to support our recruitment and tactic goals.*

*Communications tactics will reach residents, our existing and future chapter members, and elected leaders in and around our town. In addition to supporting passage of our resolution, our communications will raise awareness of the issue in general and build more urgency for the need to address climate change.*



### 3. AUDIENCES

**Who do you want to reach with your communications?**

*This is likely similar to who you have identified with your power maps, although there may also be groups in the general public your communications need to speak to. Audiences may be elected leaders in and around the city, residents, bird lovers, or even your opponents.*



#### 4. KEY MESSAGES

**These are your universal messages, ones you want to convey in every communication and that will work for most or all audiences.**

*Example: Hotter weather, heavier rains, rising seas—birds are in crisis, even the goldfinches and nuthatches at your backyard feeder. Birds need climate action now, and it's time for our city to take action.*

*Example: The first step in climate action is to pass a resolution, a public declaration of our commitment to address this issue together and in a way that builds a strong community and economy, leaving no one behind.*



#### 5. MEASUREMENT

**Once you complete your strategy chart and tactics, you will likely have some media objectives. Think through how your communications strategy can help with your media and other tactics. Examples of media objectives might be:**

- Five earned media stories, including one TV story and one radio story
- Two letters to the editor placed in the local paper by volunteer leaders
- One op-ed from a coalition partner in the faith community
- At least 100 social media posts from volunteers throughout the campaign using our hashtag

**Earned Media refers to news stories that feature your organization in some way that you did not write, produce, or pay for.**



#### 6. INTERNAL CAMPAIGN COMMUNICATIONS

**As you plan for media and other external communications, you should also plan for how you will update your campaign volunteers and partners. What events will trigger communications to your full list? How far in advance of events will you send invitations? Include these on your calendar as well. You may want to add a separate, more detailed, calendar for e-mails to your members and campaign list and track those in more detail.**

*For more information, see our communications template in Appendix J.*



### PROMPT no. 8



## YOUR MESSAGING

[illegible]



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



# Building Your Team

## CAMPAIGN AND COMMUNITY

A strong, well-built campaign brings people together, and includes multiple levels of leadership and engagement. While at first it might seem more difficult and time consuming to recruit and train new people rather than just getting started, what you ultimately build will be more successful, longer-lasting, and transformational the more people from your community you bring in.

*photo by:*  
Luke Franke/Audubon



### Section 1: Story of Self, Us, and Now

Explains and explores the Story of Self, Us, and Now and illustrates how storytelling builds relationships.

### Section 2: Recruitment

Introduces engagement techniques to bring people together around an issue.

### Section 3: Team Building

Discusses how to build and structure a team.

### Section 4: Inclusive Recruitment

Talks about how to build a team that represents the community.

### Section 5: Leadership

Talks about how to build leaders.

You cannot run this campaign alone. As you read this chapter, keep in mind your organizational considerations as they pertain to your campaign's goals, strategy, and tactics. The team you put together will ultimately be responsible for executing your campaign strategy and tactics.



## 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 to and connect with 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 and 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 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. Created by expert organizer Marshall Ganz, **a Story of Self is your personal call to action and leadership as a result of facing challenges.**

#### THE STORY OF SELF,

**US, AND NOW** is a powerful tool for framing your individual meetings, your presentations, and even meetings with legislators. Your campaign, chapter, or other organization can have a story as well. Just like your personal Story of Self, Us, and Now, the story of your chapter or your campaign can also help you connect to others, and ground your work in the original vision as well. Think of why your chapter has come together for this campaign, why you want to do it together, and why you want to do it now. This format (next page) is an organizing and recruitment technique that you can adapt for many situations.

#### Find the courage to share your discoveries. Ask yourself:

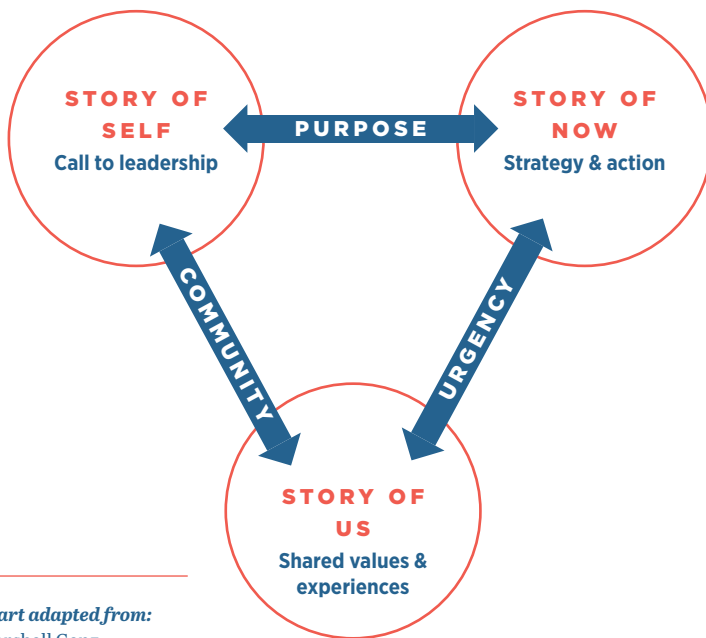
1. What is a challenge you faced?
2. What was the choice you made to address this challenge?
3. What was the outcome of your choice?

#### 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.





*chart adapted from:*  
Marshall Ganz,  
Harvard University

## 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 does the community share?
- What challenges has this community faced?
- What change does this community hope for and why?
- Why do we need to do this together (collective action) rather than as individuals?

## Story of Now

- What is the urgent challenge the community faces?
- What does the future look like if this change is, or isn't, made?
- What choice are you asking people to make right now and why?
- What action are you asking people to take right now and why?
- What impact will these actions and this campaign have on the bigger picture?

	PROMPT no. 9
	
YOUR STORY OF SELF	
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	

 Take a moment  
and write out your  
own story of Self,  
Us, and Now

## SECTION 2

### RECRUITMENT

Recruitment is the intentional process of bringing new people into your campaign, and teaching them the skills necessary to be successful. Good recruitment is crucial to your campaign, because when people start seeing themselves in your campaign efforts, they are more committed to enacting change. Generally, people want to join campaigns to feel heard and valued. 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.

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

### PRINCIPLES OF RECRUITMENT

To start recruiting, you'll want to build a *recruitment appeal*, a short pitch asking an individual, or multiple people, to get involved, touching on their shared values and their self-interest. In organizing, self-interest has a specific meaning. It isn't about selfishness. Instead, it refers to our motivations and what each individual gets out of volunteering. There are five main 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, and see why it can be valuable to join the campaign. Self-interest can be a powerful driving force for your volunteers, not just in recruiting them initially, but in keeping them engaged. 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 Chapters 4 and 5.)

 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?

[illegible]

## HOW TO THINK OF RECRUITMENT

Thriving campaigns are always bringing in new people, and helping existing volunteers become leaders. Are you just starting out and need more people? Recruit. Do you have volunteers for every part of your campaign? Increase your goals and recruit some more.

Your campaign can lose steam if no new members sign up—new members bring new ideas and they mean you can do more and reach more parts of the community. 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 high 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 means going to an event to seek out new volunteers. 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 e-mails 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 yesses. When recruiting, it is best to have the attitude of a golden retriever and the memory of a goldfish.

## TIPS FOR EFFECTIVE RECRUITMENT:

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 on a different date, or to a different action, or if they would be willing to organize the list of signers afterwards and write a follow-up e-mail. Make sure to talk to them about their own interests and what they're comfortable with, and be prepared with multiple asks to see if there is a better fit. There is always lots of work to be done, including behind the scenes. 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. If you have time, this is the place for your Story of Self, Us, and Now.

3

**PRACTICE ACTIVE LISTENING**

Find out their own story, and why they might be interested—i.e., why did they stop at your table or come to your meeting at first? 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 with 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, and 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 and conversations, and make sure to record everyone's 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.

## THE ART OF THE ONE-ON-ONE

One of the most effective tools in building a dedicated volunteer base is a one-on-one meeting. One-on-ones serve as a proven campaign recruitment tool and provide opportunities to advance volunteers up your campaign's ladder of engagement. The more one-on-ones you have, the more likely you are to have a thriving campaign.

One-on-ones are 30- to 45-minute meetings that are focused on relationship building. They are well-planned and have an explicit goal. When scheduling a one-on-one, you should be clear about the purpose of the meeting. Is it a discussion of the campaign strategy, ways to get involved, or something more specific? The organizer should also have internal goals for the meeting. For example, an organizer could enter a recruitment one-on-one with an aim to schedule the potential volunteer for three petition gathering shifts over the next month.

Successful one-on-one meetings include deep and meaningful conversation that centers on stories and an ask. An effective one-on-one often consists of the following:

Once a one-on-one is complete, the organizer should follow up with the volunteer. Always thank your volunteer for taking the time to meet with you and for committing to join the campaign. Make sure to confirm commitments, deepen your connection, and continue to build the relationship over time.

During a campaign, an organizer will have multiple one-on-ones with a single volunteer to discuss new opportunities and leadership roles. As you solidify your teams, use one-on-ones to explicitly ask your volunteers to become team members, leaders, and advocates. The purpose of one-on-one meetings can range from recruitment to volunteer development to discussion of a specific task, and everything in between.

### **EXPLICIT PURPOSE**

While the conversation can be casual, it is essential to state and reiterate the meeting's purpose and urgency from the beginning.

### **STORY OF SELF, US, AND NOW**

An effective organizer shares their personal story to create emotional bonds, obtain credibility, and learn more about the volunteer. It is also an opportunity to make your campaign's issues more personal and compelling.

### **THEIR STORY**

You should also ask a potential volunteer why they took time out of their schedule to discuss joining the campaign. In other words, identify their self-interest. Not only will you create a stronger bond, but you will also learn valuable information about the potential volunteer that can be used when making your ask.

### **AN EXPLANATION OF YOUR CAMPAIGN STRATEGY**

Successful one-on-ones give volunteers a peek behind the curtain of a campaign. By cluing them into the campaign strategy, you give them a tangible outline of how their skills could be best put to use.

### **HARD ASK**

Every one-on-one should end with an ask. Using information and stories from earlier in the meeting, the organizer should articulate why the potential volunteer needs to get involved. Organizers should ask volunteers for a specific commitment. They should have multiple opportunities to get involved with precise dates and goals attached. Also make sure to ask for names of other potential volunteers.

[illegible]

*photo by:*  
Luke Franke/Audubon



## SECTION 3: STRUCTURE

### TEAM BUILDING

As members of Audubon chapters, you already know about the importance of building and working together in a team. Depending on your Audubon chapter, you may already have a structure for advocacy and conservation. It may be work done by your chapter as a whole, it may be a subcommittee, or it may be brand new. This section will cover what we've seen as best practices for setting up an advocacy team, but you can adapt to what works best in your chapter.

### WHAT MAKES A STRONG TEAM

A strong team will give every member the opportunity to grow in skills and leadership. It creates a supportive environment to build each other up, and uses everyone's skills, talents, and interests to build the organization and win your campaign.

### WHY WE NEED 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.

**photo by:**  
Luke Franke/Audubon



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.

### STRUCTURING YOUR TEAM

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.

## COMMUNICATION AND EXPECTATIONS

It is important to set a 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 do you need for this and future campaigns?**
2. **What knowledge, skills, or abilities do you need?**
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 like to use the Snowflake Model, and focus on the importance of creating inclusive and interconnected teams.

## THE SNOWFLAKE MODEL

The Snowflake Model is 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.

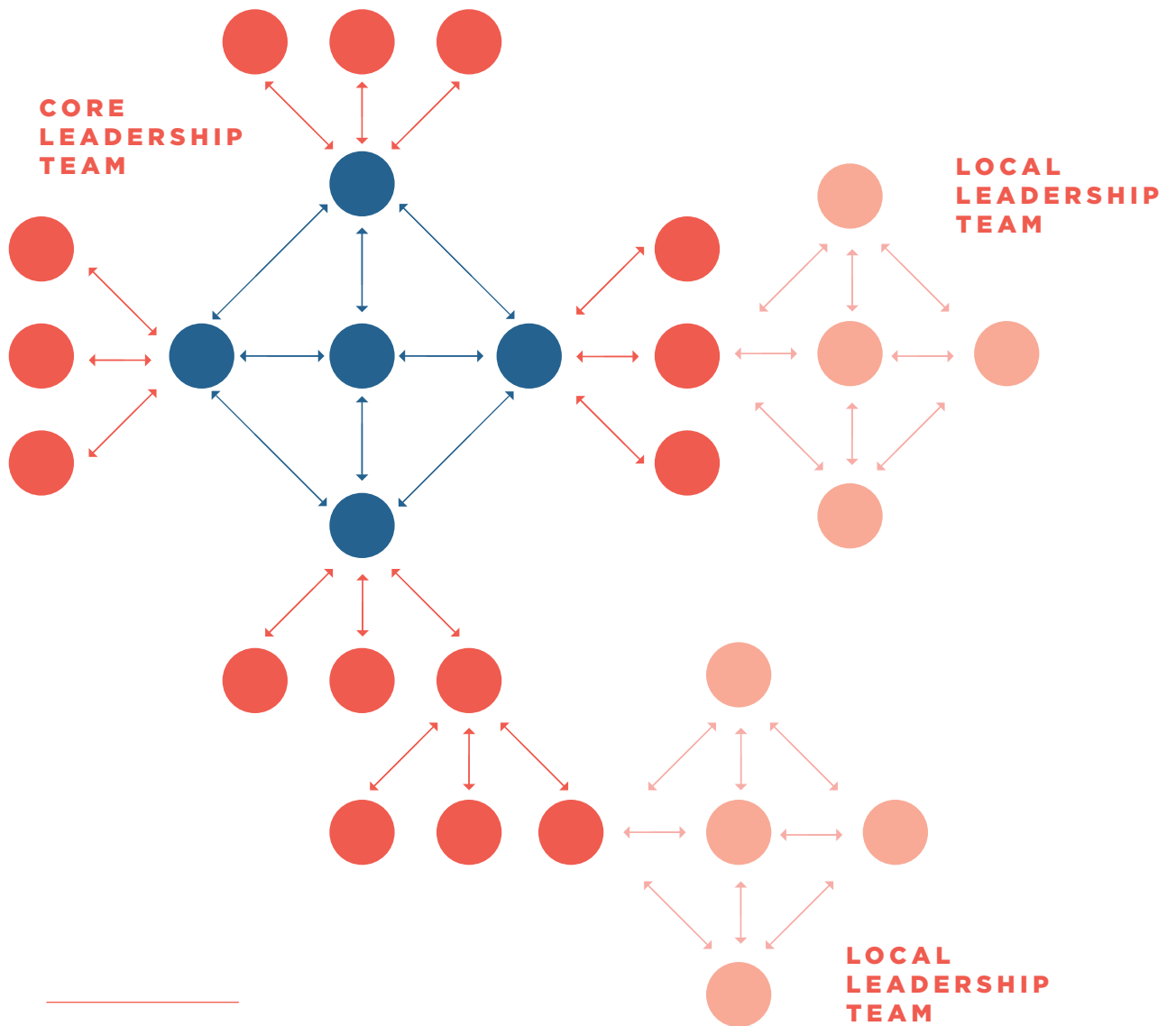
The Snowflake Model, as seen on the next page, is all about delegating responsibility. Let's say you're working on a campaign to get a 100 per cent renewable energy resolution passed in your town. You've filled out the campaign strategy chart, and know your goals, strategy, targets, gains, allies, and opposition. Your tactics, for example, are getting businesses to sign on to a letter in support of 100 per cent renewable energy, and getting five Letters to the Editor published in your local paper to draw attention to the issue. 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 these two teams will be responsible for 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,



**photo by:**  
Lauren McCullough


## SNOWFLAKE MODEL



*chart adapted from:*  
Marshall Ganz,  
Harvard University

The Snowflake Model works best when used in parallel with the ladder of engagement discussed further on in Section 5. You might not start out with the leads for your full campaign, but you'll find those individuals who prove that they can and want to take on more. And you can structure this with what works best for your campaign. You may want to make sure that each smaller piece of the snowflake has a representative from every civic association, for instance, in your community. If your campaign covers a large area, you may want district leads that then coordinate representatives from business, media, research, and others in their districts.

## MAKING DECISIONS

 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.

CAMPAIGN ADVOCACY MANUAL

## 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 petition lead does? What about specific goals they have for each event, or in total? 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.

## SECTION 4: INCLUSIVE RECRUITMENT

Now that we've gone over some of the basics of recruitment, let's talk about who we recruit. Many times, our original one-on-one conversations are with people we know and are friends with, or are already in our chapters. We gather new recruits at the types of events we already know of and usually go to. This all makes sense, but if we never get beyond that first set of contacts we generally end up recruiting a group of volunteers who look like us, live in the same parts of the community, and have similar backgrounds. In historically predominantly white organizations such as Audubon, it often means that our chapters are predominantly white as well.

To build a long-lasting environmental movement, and one that incorporates principles of environmental justice

and anti-racism as well, we need to ensure that we have a diverse, broad-based membership in our chapters. It is the right thing to do, and having volunteers who truly represent all aspects of your community is good for your movement as well. We know that respect, equity, inclusion, and opportunity for people of all backgrounds, lifestyles, and perspectives, will attract the best ideas and harness the greatest passion to shape a healthier, more vibrant future for all of us who share our planet.

Audubon has put together a guide to Equity, Diversity, and Inclusion for chapters that can be found on Audubon Works. We're also including some suggestions here for recruitment:

- **Identify Your Community**—what neighborhoods, demographics, and organizations, make up your community. Who is in your community, but not represented in your chapter or campaign? Bringing in new voices will build a more welcoming organization.
- **Make Your Outreach Inclusive**—Seek out and value knowledge from different parts of your community. When you are planning events, look at areas you have not always visited. When looking for outreach and recruitment opportunities, try not to only go to the same places, but seek out opportunities in parts of your community you have not worked with before.
- **Listen and Learn**—When reaching out to new organizations and new communities, be responsive to their concerns as well. One-on-ones and other intentional recruitment will be essential so that you can hear others and be responsive. This might also give you and your chapter new ideas for programming, outreach, and campaigns.
- **Create a Welcoming Atmosphere**—Make sure you are welcoming to new people and that new members have opportunities for leadership. When recruiting, and when welcoming new members, avoid jargon, overly technical terms, and other 'in-group' language that may make new members feel excluded. Vary your programming and bird watching events to ensure people of all skill levels and physical abilities have options and are included.
- **Check in with New Members**—Make sure that new members feel welcomed. Keep an open mind and do not be defensive if there are criticisms. If something you or others are doing is making new members feel excluded, or the chapter not be diverse and inclusive,



even if unintentional, this is something to be aware of, apologize for, and fix.

- **Be Willing to Have Hard Conversations**—Most of us are working towards being a welcoming and anti-racist organization, but there are sadly individuals who are not. Make clear to all members that sexist, racist, bigoted, or otherwise discriminatory language is not allowed. Write in your values and by-laws that there will be no discrimination or harassment by gender, orientation, race, age, physical ability, religion, or other. At times this may mean having difficult discussions with long-time members or even asking them to leave. But discrimination and harassment can never be allowed.

Through being intentional in recruitment, we can build an inclusive and anti-racist organization. Working together we can build a stronger Audubon for everyone.

## SECTION 5: LEADERSHIP

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:

A supporter or volunteer who shows up to a team event (meeting to discuss strategy and timeline) and regularly attends meetings, team events, or responds to communications.

### 4. Leadership Prospect

Team members who begin to take on more responsibility through leadership. For example, they may now be planning a petition event, managing logistics, or recruiting new members.

### 5. Organizer/Advocate

This person is a reliable leader, who now manages an entire aspect of your campaign. They may have committed to plan an event, lead a subcommittee, or chair a regional part of your campaign.

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 (phone banking, letters to the editor, etc.), they are telling you they are ready to take on more responsibility.



## LADDER OF ENGAGEMENT



*chart adapted from:*  
 Marshall Ganz,  
 Harvard University

## GUIDELINES FOR TEAM 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 ladder of engagement. Not everyone is going to come to the table with the skills they need to be successful in their campaign role; it's your job as a campaign lead 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 their actions. Work together on ways volunteers can improve.
- 2. Use Model Leaders to Train Others.** Inspire leaders to teach others how to do what they do. No one should be irreplaceable. The campaign cannot stop because a key individual with special knowledge or a skillset steps back, and volunteers should never feel that all roles are filled and there's no way for them to grow. 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.

## SECTION 5: LEADERSHIP

### PRINCIPLES FOR LEADERSHIP DEVELOPMENT

Every time you meet a new face, you should not only be thinking about 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. We follow these principles of leadership, but you may want to add others to your own definition of a leader.



#### Leaders Bring Others Along

They may be able to turn people out for events, make sure everyone is at the chapter meeting, or manage the data or research volunteers. Whichever it is, your leaders are people who others are turning to, who can motivate volunteers or new recruits, 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 of the people engaged. Every campaign strives to balance the two styles of leadership.



CHAPTER

4

ABOUT TACTICS

AUDUBON CAMPAIGN  
ADVOCACY MANUAL

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





# About Tactics

## 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. In Audubon campaigns, we define 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 always be done by someone to someone (a.k.a. the decision maker).

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. This chapter goes into detail on how to strategically identify your tactics.

**photo by:**  
National Audubon Society



### Section 1: What Are Tactics

Defines tactics and guiding principles to think through the most effective tactics for your constituent base, your targets, and your campaign.

### Section 2: Choosing a Tactic

Explains some of the considerations you will use to choose different targets.

### Section 3: Being Strategic

Helps you think through where your target is on your issue and how that can influence your tactics.

### Section 4: Campaign Timeline

Shows you how to put together a campaign timeline or field plan to ensure your tactics are timed effectively and you are hitting your goals.

## SECTION 1: WHAT ARE TACTICS

### INTRODUCTION

Grassroots campaigns are powered by people to counter organized money from special interest groups. We need a network of supporters and volunteers, and we also need to demonstrate the power of this network to our target and to the wider community.

Our decision makers that are elected by voters are influenced by their constituents. Constituents who care deeply about an issue and show it by taking action

## Grassroots campaigns are powered by people.

together can amplify their voices and be more powerful than individuals calling or writing on their own or only once. Large numbers of committed people, mobilized by their deep desire for a better world, are the most precious form of power in a democracy, and something that money cannot buy—although people may try.

However, numbers alone do no good if you are not using your tactics in a strategic manner. Getting a decision maker to change their mind on a particular issue will not happen on its own. That is why tactics always come last. In order to properly plan your tactics, you need to know:

- Who from your list of constituents, allies, and partners will be involved in your tactics?
- What are your constituents, allies, and partners comfortable with and able to do in the short term?
- Who is your tactic targeting and how will it move the target?
- Is your tactic building or demonstrating power?

Once you have the planning and information you need to answer those questions, you're ready to plan your tactics. This chapter will take you through the how, when, and why of strategic tactics.

### WHAT ARE TACTICS?

Tactics are actions designed to build or demonstrate your power, pressure your target, and advance your goal. Effective tactics mobilize your volunteers to take strategic action, get direct attention to your issue, and strive to achieve a specific objective. Every tactic is different, but they should all be moving your campaign towards your ultimate goal. In Section 5 we'll go into more detail of the 'how to' of various tactics. Examples of different types of tactics include:

#### Recruitment and Power Building Tactics

- Hosting educational events for the community that rally people around joining your campaign and signing a letter, postcard, or petition for your cause
- Dropping flyers in every city council member's office raising awareness of the issue and why your organization supports or opposes it
- Petitioning people at the farmer's market, county fair, or outside business establishments

#### Grasstops Tactics

- An open sign-on letter to the decision maker signed by all members of the Chamber of Commerce or other key community organizations
- Hosting a teach-in with local schools or faith organizations and leaders
- Bringing chapter leaders and community leaders to meet with elected officials

### Mobilizing Events

- Bringing a large group of constituents to a town hall, council meeting, or other public event where they can be visible and testify on your issue
- Holding a large public rally in support of your issue
- Getting out the vote

Different decision makers may be moved by different tactics, so make sure your tactics are rooted in research and your power map. You will also likely need a combination of tactics in any campaign, and the pressure will need to be sustained. Building and demonstrating power, even for a short-term goal, requires commitment.

## SECTION 2: CHOOSING A TACTIC

Audubon advocacy is all about empowering real people to harness real power to win campaigns. A tactic is most effective when it can demonstrate your power and bring lots of people together, face-to-face with your targets. It is also most effective when you've done your research and know what—and who—your target responds to. We believe tactics should be informed by research, creativity, and the talent of the people deploying them. When selecting a tactic make sure that it:

1. Creates concrete or measurable progress toward your campaign goals that you can communicate to others.
2. Attracts and engages new people, building power to further your campaign and work towards the next one.
3. Develops the leadership, skills, and capacity of your constituency.

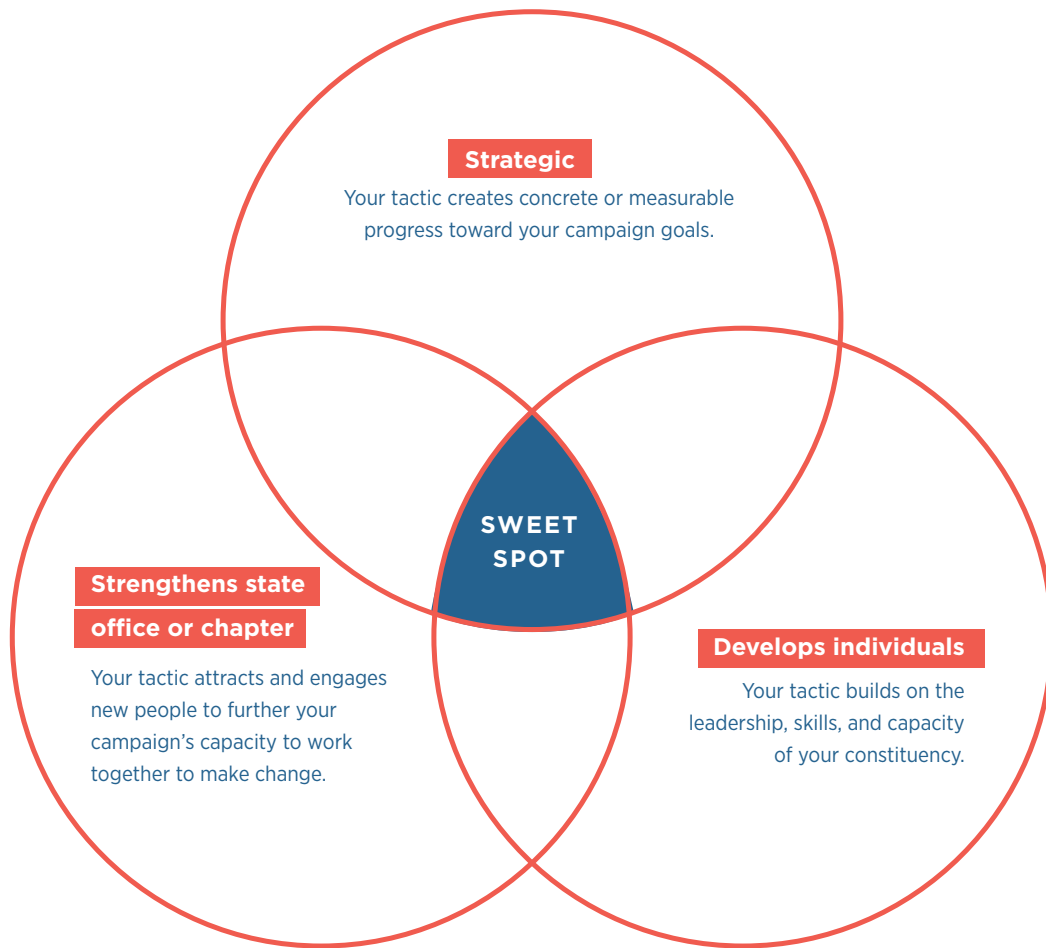
These criteria are important because tactics should always move your group forward for your short-term campaign goal, but should also have an eye towards the long-term goal and the next campaign. That means looking at what moves your target, builds power, and develops new leaders. If we follow these rules, there are times that we win and there are times when we'll lose—but we'll lose in a way that will make us more likely to win next time.



**photo by:**  
National Audubon Society



## SWEET SPOT DIAGRAM



---

*chart adapted from:*  
Marshall Ganz,  
Harvard University

## TIPS & TRICKS

From fundamental, tried-and-true practices like phonebanking and canvassing, to new social media techniques, we have many tactical tools, and many ways to be creative, playful, and effective. But we need to choose smartly. You don't want to do something flashy that your target will ignore or be unimpressed by. You don't want to put all your effort into one tactic you don't have enough people for, repeat the same actions, or do things that will unintentionally limit your coalition—or fail to do a powerful tactic because you're worried about holding the coalition! What's most important is to have your research, have your power maps, and make sure you've thought all your tactics through. There are upsides and downsides to everything, what's important is to make sure you've thought them through, and know that you've thought this through, that it will be effective, and that any positives outweigh the negatives.



## SOME TIPS

1. Make sure your tactic is directed at your target. If you have a really exciting tactic but it will ignore your target's primary constituents, or be more effective at moving the target in the neighboring district, that isn't helpful. Make sure you know who the decision makers are, and that your tactics are meant for them.
2. Choose tactics that will build and challenge your group, but that are still possible. A tactic meant to demonstrate power that doesn't have enough people can actually hurt your cause. Something that requires a mass-movement, like a boycott or a march, would be the final tactic of a campaign and only works with lots of people. Other visible tactics need lots of people to be effective. With a smaller group of committed activists, though, you can choose tactics that will build and recruit your power, like canvassing or tabling, or higher-bar (more challenging) tactics that need fewer people, such as meeting directly with decision makers or speaking at town halls.
3. Make sure the tactics will be effective for your campaign! Don't just choose the tactics that sound exciting. And don't do a tactic just because it worked for a different chapter, but do talk to other chapters, organizations, or your state office for ideas.
4. Only move forward with your tactics when your campaign chart or power-mapping are complete. You need to know what influences your target, who they listen to, and who your allies and partners are, to know the most effective tactics.
5. Have fun! Working together as a team, getting your community involved in something you care about, and changing your community for the better, are all exciting things. Campaigns are work, but your tactics should be fun, too. Make sure you enjoy what you're doing, and celebrate successes as they come.

### SECTION 3: BEING STRATEGIC

When choosing a tactic, you need to understand how that tactic builds or demonstrates your power, and if it's getting you closer to your long-term, intermediate, or short-term goal. Each campaign, each target, each coalition, and each Audubon chapter are different. The political climate is different, your constituents are different, and your resources are different. Most importantly, where you stand with your target is different. You will adopt a very different strategy if you have an elected official who wants to support you but is afraid some of their constituents will be angry (cover strategy) than if you are trying to show someone who opposes you that you have enough power in the district to make them vote in support.

On the next page is a target strategy worksheet to help you think through strategies depending on the relationship you and your campaign have with your decision maker. Ideally, we would be friendly with all decision makers, but sometimes we are on opposing sides. We should remember that an opponent this time can be an ally next time, so we don't want to burn bridges. But politicians are used to constituents pressuring them; it's part of the job! It's okay to do something that feels daring, maybe even confrontational, as long as you are being disciplined, tactical, strategic, and principled in your actions.

For a blank Target Strategy Worksheet, see Appendix D.

### SECTION 4: CAMPAIGN TIMELINES

Other than people, time is your most important resource—and it's one you can't get back. The key to having a winning campaign is planning ahead and timing your tactics so you can be effective and sustain your power. We educate, elevate, and escalate by showing our power.

A field plan or timeline is the document we use to plan out an effective campaign, stagger and escalate our tactics, and make sure we're meeting our goals. You can see a sample field plan and a field plan template in Appendix E. A good field plan also keeps track of other key events and dates in your community. Examples of things to think about when putting together a field plan or campaign timeline: Is the legislator up for reelection? Are there any holidays or large community events that can be used for a tactic, or need to be avoided? Something that will pull volunteers or media away? If you are planning something like a large rally, do you have the time to plan—and to recruit enough people before hand? How would things in your long-term plans change if your target agrees earlier than expected? A campaign timeline and field plan help keep all of these things straight and your campaign on track to win.




**photo by:**  
National Audubon Society

**Remember, an opponent this time can be an ally next time.**

Find time to go over these strategies with your team. For each target, assess whether you either need a Hero, Cover, or Pressure strategy.

Fill out your target strategy chart in Appendix D.

51

	TACTICS	PROMPT no. 13	SEE APPENDIX D
YOUR TARGET STRATEGY			
HERO	COVER	PRESSURE	
<p>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.</p> <p><b>Potential Hero Tactics:</b></p> <p>Give your target an award to recognize their leadership.</p> <p>Hold a press/media event with your target.</p> <p>Send individual, group, and community ‘Thank You’ letters.</p>	<p>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.</p> <p><b>Potential Cover Tactics:</b></p> <p>Collect a significant number of petitions.</p> <p>Direct calls to your target’s office.</p> <p>Write Letters to the Editor, Op-eds, and have editorials published supporting the issue and ensuring your targets feels equipped take a stand.</p>	<p>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.</p> <p><b>Potential Pressure Tactics</b></p> <p>Follow your target(s) to public events and ask them questions about your issue, and make them feel pressured to respond and act (birddogging).</p> <p>Write Letters to the Editor, Op-eds, and have editorials published to pressure your target through media demands and calls for action.</p> <p>Have constituents and important community leaders pledge to pull their support.</p>	

## APPLYING THESE LESSONS

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 to, 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 they have the most positive potential for your collaborative efforts.

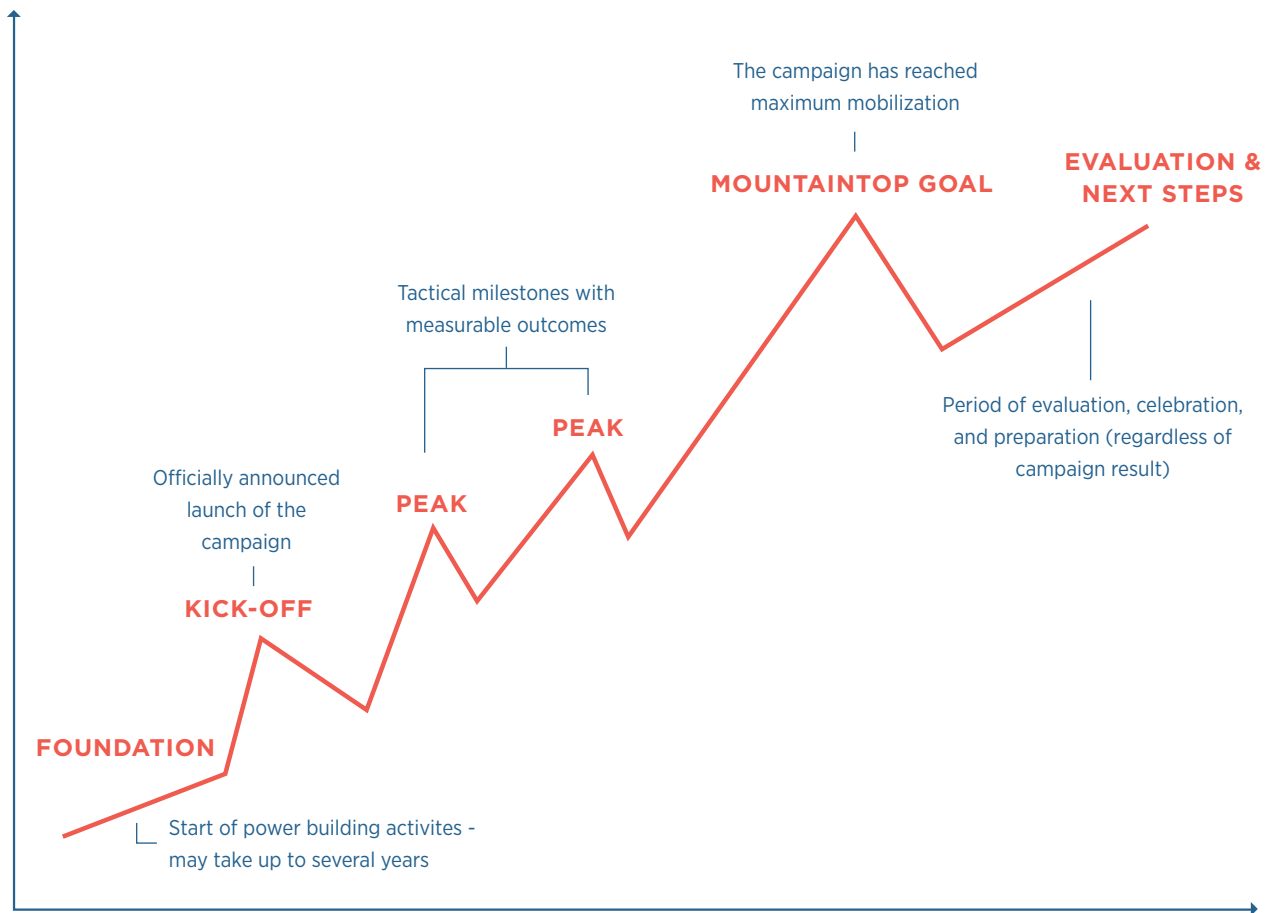
Tactics are not meant to be technical, wonky, or boring. Have fun, but be focused! Never attempt a tactic for purely symbolic reasons, no matter how interesting it could be. Channel your artistic and creative flare by first evaluating whether a tactic makes sense based on the element of power behind it. And as you plan, remember, every tactic must have:

- **Someone who does it**
- **Someone to whom it is done, a.k.a. the decision maker**
- **A date by which it is done**
- **A strategy behind why this helps move your target**

And most importantly, every tactic must build or demonstrate power.

And now you're ready to fill out the final column and 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 using based on your campaign strategy. You want to tailor these tactics to match your group's strategy, as well as your group's realm of experience and risk tolerance. And remember, this is not a comprehensive list. There are plenty of other tactics not listed in this manual, but these are some of the most common or useful for Audubon chapters.


## CAMPAIGN TIMELINE GRAPH



*chart adapted from:*  
Marshall Ganz,  
Harvard University





-  Use this space to brainstorm some of the key events and deadlines for your campaign.

CAMPAIGN ADVOCACY MANUAL



CHAPTER

5

GUIDE TO TACTICS

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



# Guide to Tactics

Now you've learned how to put together your vision, make a strategy chart, think strategically, and build your team. You know how to power-map your target, and what you need to consider to identify the best and most effective tactics. Now it's time to plan. Included here are how-to guides for several tactics. These aren't all the tactics that are possible, or all that we would suggest. Listing all the tactics one can use in an advocacy campaign would be another manual all on its own. What we have here are some of the most common tactics, the most essential ones, and some that we've seen are well suited to Audubon. You also don't need to think of these all as different pieces; sometimes you'll want to combine tactics to be effective. Maybe you combine an educational event with signature collecting, a media event to end a bird tour with legislators, or a meeting with decision makers and letters to the editor. Tactics can support and build on each other. Find the ones that work the best, get creative about new tactics, have fun, and most importantly be brave for birds!

## SAMPLE TACTICS IN CHAPTER 5



### HOSTING A BIRD TOUR

*Build a relationship with your targeted decision makers through a unique shared experience.*



### EDUCATIONAL EVENTS

*Information about your issue and your campaign can be packaged into an event like a film screening.*



### LETTERS TO THE EDITOR

*Writing from our personal experiences is a great approach to getting your decision maker's attention on the subject matter.*



### SIGNATURE COLLECTION DRIVE

*Collecting signatures and delivering them to your target both demonstrates your issue's widespread support.*



### MEETING WITH A LEGISLATOR

*Meeting with a decision maker is your opportunity to let them know how they can help.*



### MEDIA OUTREACH

*Almost every campaign will want to use traditional media outlets (print, TV, radio) to raise awareness of your issue.*

## HOSTING A BIRD TOUR

Inviting a decision maker to a bird tour is a way to involve many different volunteers with Audubon, and showcases our organization's strengths. Done right, bird tours are available to all ages, abilities, and levels of expertise, and can be a great way to build a relationship with your targeted decision makers through a unique shared experience.

### STEP 1

#### IDENTIFY YOUR TARGET AND DETERMINE YOUR GOALS

Using your strategy chart and power maps, identify the decision maker(s) you need to engage on your issue and what your goals for the bird tour are. Do you have a direct ask? Are you hoping to educate them on your issue to strengthen your ask in the legislative session? Is there a particular bird, habitat, or Audubon program that connects to your goal? These decisions will help inform how the bird tour should be structured, when it will be held, and what other attendees you might invite.



**STEP 2****MAKE THE ASK**

Four to eight weeks out, reach out to the staff or scheduler for your decision maker to ask if you can host them on a bird walk in their district. How far ahead depends on the decision maker. The general rule of thumb is that the higher the office, the more advance time you'll need. Be prepared to provide some information on the event, such as the location, proposed date, potential attendees, and topics. Emphasize that attendees will be constituents from their district. If you have not heard back from the staff, continue to follow up each week. Make sure to give yourself plenty of time between verbal confirmation and the day of the event so that you have time to confirm your location and guest list and solidify your talking points.

**Sometimes  
you'll want  
to combine  
tactics to be  
effective.**

**STEP 3****PREPARE FOR THE EVENT**

Once you have confirmed the event with your decision maker, reach out and invite others who could join and contribute to the discussion. This is also the time to confirm if the decision maker would be comfortable with inviting media. Some ideas for potential attendees are:

- Other Audubon or Chapter members who can assist in leading the tour
- Leadership or active members from other Audubon chapters within the decision maker's district
- Leadership from local organizations doing work on important issues within your decision maker's district
- If you are hosting the event at an Audubon center or sanctuary, invite staff members that can contribute specific information about the site
- If you are hosting your event at a local, state, or national park, or a wildlife refuge, invite staff members or volunteers who can speak to the important work of their programs
- With the decision maker's approval, invite media, especially if you have built relationships, and someone to take pictures

As you are making this list of attendees, remember that constituents are the most important to invite. Those are the ones who your decision maker wants to hear from, and they are where your power lies.

Once you have your list, prepare your materials for the meeting. You will want to put together talking points for those who will be attending your meeting, as well as an informational packet to share with your decision maker.

Create an agenda for the conversation and practice what you are going to say. Make sure that your pitch clearly states your position, your 'ask', and any supporting information.

**STEP 4****GO ON YOUR BIRD TOUR!**

Make sure you have brought all the materials that you may need. This may be extra binoculars for the decision maker and attendees, informational materials, extra bird guides, light refreshments, or portable chairs if you'll be sitting during the event. Plan on gathering at least 30 minutes early to ensure everything is set up properly, and ask other attendees to gather 15 minutes early. This can give you time for a last-minute check-in, and a buffer if there is anything unexpected.

During the event, be courteous and friendly, and let your enthusiasm for the event and the cause shine through. Create a relationship with a decision maker and their staff, find common interests, and help them get interested in the birds and natural landscapes in your community. Designate one of the attendees as the picture-taker, and get as many action shots or videos as you can for later use.

Clearly lay out your 'ask'—in other words, what you want to see from the decision maker. At the end of the event, thank them for coming to meet with you, and make it clear you will be following up in the future.

**STEP 5****FOLLOW UP**

Immediately after, or even during the event, post to social media and remember to tag the decision maker as well. After the event, follow up with the staffer and decision maker as soon as possible with a thank you message, and reiterate your ask and how you hope to follow up in the future. If the decision-maker or their staff mentioned any follow-up materials during the event, or if you have opted to send more information rather than carrying a packet the day of, include this in your message as well. Encourage other attendees to send thank you notes as well and, if possible, consider a sign-on letter from your chapter. This can include members who were not in attendance.

If you have agreed to do media, send along visuals and follow up with media as well. As a reminder, when confirming the event, ask the staff whether media, photo, and video would be acceptable. Try to broadcast your event through as many channels as possible, including through letters to the editor or op-eds. Get creative on how you get the word out with traditional and social media.

**TIPS FOR SUCCESS**

1. Be careful not to gather too many people. You want the event to be well-attended but not overwhelming for your guest. If you're wondering who to bring, constituents will always be the most important attendees!
2. Make sure that your guests match the topics on your agenda. Consider all the actors in the community that benefit from conservation programs, be it conservation groups, businesses, or sportspeople, and reference this with the groups on your decision maker's power map.
3. An inclusive bird tour should have reasonable accommodations for people of varying abilities to fully participate and feel welcomed. Share details on the trail and distance if you will be walking or hiking, and consider how to make the trail or tour accessible to those with limited mobility.
4. Stay in touch! This event is only the first step. Be sure to send periodic updates about your community, reminders about votes or hearings related to your main ask, and hold them accountable by sharing thank you notes and social media posts for positive actions, and questioning them about negative actions.

	SAMPLE INVITATION TO DECISION MAKER
<div data-bbox="776 525 841 590" data-label="Image"></div> <div data-bbox="386 640 1229 669" data-label="Section-Header"> <h2>LETTER TO DECISION MAKER: EXAMPLE TEMPLATE</h2> </div> <div data-bbox="386 724 628 749" data-label="Text"> <p><b>TO:</b> Scheduler or Staffer</p> </div> <div data-bbox="386 756 974 783" data-label="Text"> <p><b>SUBJECT:</b> Meeting Request with Representative Ann Hinga</p> </div> <div data-bbox="386 833 604 861" data-label="Text"> <p>Dear <i>[name of staffer]</i>,</p> </div> <div data-bbox="386 865 1222 1020" data-label="Text"> <p>I hope that the New Year is off to a great start. Since Representative Hinga is scheduled to return to her home district at the beginning of April, I am reaching out to see if she is interested in joining members of the Western Tanager Audubon Society for an hour-long bird walk and discussion. The event will be led by members of the local chapter and would be a great time to experience the unique birds and wildlife of the region.</p> </div> <div data-bbox="386 1024 1230 1178" data-label="Text"> <p>Since 1905, the Audubon Society has been dedicated to protecting birds and the places they live. The Audubon network is comprised of state programs, nature centers, and local chapters that reach millions of people each year and help inform, inspire, and unite diverse communities in conservation action. <i>[Add specific language here about the chapter(s) in your area.]</i></p> </div> <div data-bbox="386 1182 1218 1272" data-label="Text"> <p>We would love to chat with Representative Hinga about the various ways she can help to protect natural resources within our community, and showcase the benefits of these protections.</p> </div> <div data-bbox="386 1276 1206 1369" data-label="Text"> <p>I look forward to hearing about the Representative's availability for a bird walk in our district. We are happy to work around her schedule but suggest <i>[have a couple of dates here]</i> and are open to discussing any questions you might have.</p> </div> <div data-bbox="386 1407 493 1434" data-label="Text"> <p>Thank you,</p> </div> <div data-bbox="386 1470 448 1495" data-label="Text"> <p><i>Name</i></p> </div> <div data-bbox="386 1501 534 1528" data-label="Text"> <p><i>Phone Number</i></p> </div> <div data-bbox="386 1533 454 1560" data-label="Text"> <p><i>E-mail</i></p> </div> <div data-bbox="386 1564 1042 1591" data-label="Text"> <p><i>Name and Address of chapter (highlighting that it is within the district)</i></p> </div>	



## EDUCATIONAL EVENTS

An educational event can be an effective tactic for both building a relationship with your target and helping them to understand your issue. A lot of important information about your issue and your campaign can be packaged into an event that is focused on something fun and engaging like a film screening or a nature walk—but can be connected back to the bigger task at hand. As with any standard event, make sure you have a plan to handle location, logistics, advertising, and follow-up. Consult your campaign plan to ensure this event is a strategic choice. In order to make your educational events strategic, you'll want to prepare a short presentation on your campaign to either open and/or close your event. Below are some examples:

### PRESENTING YOUR ISSUE

You will likely need to present your campaign to a broader audience, whether it is to potential supporters, volunteers, funders, or grassroots endorsers. Preparing a standard campaign presentation will allow you to articulate your vision and accomplish audience-specific goals. Presentations are effective tactics to reach a large group of people; however, they should be treated as an intimate conversation. The more personal you make your presentation, the more likely you are to convince your audience to take action. Before presenting, make sure you have conducted adequate research on your audience to tailor your talking points to their interests. As with all presentations, practice is essential.

Each presentation will vary based on the audience, but you should formulate a sample outline that works as a template for each event. Leave time for questions at the end of each presentation, and make sure to enjoy your time in front of the audience.



### THE FIVE-MINUTE PRESENTATION

#### Introduction

##### 30 SECONDS

Welcome your audience and thank them for taking time out of their busy schedules to learn about your campaign. Outline the structure of your event or presentation and briefly introduce other organizers in the room.

#### Story of self

##### 2 MINUTES

While you may be running an urgent and necessary campaign, your audience is unlikely to take action unless you connect the campaign's issue to your personal story. Your personal story does not have to be the story of your whole life, but rather the precise moments that led you to take action. Telling your story also gives you a way to make complex issues personal and tangible.

#### Campaign purpose

##### 30 SECONDS

Connect your story to the values and mission of the campaign. Let your audience know what you are trying to achieve and how it better your community

#### Campaign strategy

##### 1 MINUTE

Clue your audience into the campaign strategy. This will help your audience understand how they could fit into the campaign framework and how their involvement is needed to win. You don't need to provide all the details, just a short overview.

#### The urgency of now

##### 30 SECONDS

Explain what your campaign needs to be successful and why you need to take action now.

#### Hard ask

##### 30 SECONDS

Every campaign presentation you make should end with an ask, whether for support, action, or volunteer shifts. Start big by affirming your goals for the event and then focus on what that means for each individual. For example, the speaker could say: *"To successfully pass our city's clean energy policy proposal, we need to gather 1,000 constituent signatures by May. This requires 50 volunteer shifts. We are counting on each of you to sign up for two shifts over the next month so that we can reach our goal and advance common-sense climate solutions. You can find sign-up sheets with our three organizers who are circulating the room. Thank you for your commitment."*

## ELEVATOR SPEECH

An elevator speech is a 30 second version of your campaign story, used when you have a limited amount of time with an individual. 30 seconds can seem like a short amount of time to introduce someone to your issue and compel them to act. A good place to start is to start with your 5 minute presentation and your story of Self, Us, and Now, and then take the most important and compelling parts of each section.

You might use your elevator speech to close out an educational event to remind your attendees of the issue—but it can also come in handy for other tactics like tabling, petitioning, or phonebanking.

## SAMPLE ELEVATOR SPEECH



### Self

“

Hi, my name is \_\_\_\_ and I'm a longtime resident of Maine. I've loved spending time outdoors since I was young and nature has always been a part of my life.

”



### Us

“

I'm a member of the Audubon Society, which was founded to protect birds and the places they need now and into the future.

”



### Now

“

The outdoors that we treasure in Maine is at risk from climate change—including hundreds of species of birds, but we can save it by showing our elected officials that they have to prioritize it. A bill called the Climate Solutions Act that will reduce carbon pollution was just introduced this year, and we're working hard to make sure it passes. Can you join us?

”

## CHECKLIST

Essentials for a successful educational event:

- Sign-in sheet and/or petition
- Location
- Tape and markers for last minute signs
- Necessary audio-visual equipment (computer, projector and screen, microphone, speakers)
- Tables and chairs
- Swag (if budget allows)
  - Stickers, pins, hats, posters
- Refreshments (if budget allows)
- Informational materials
- Brochures, flyers, fact sheets
- Volunteers for the following roles:
  - Outreach and planning
  - Setup
  - Breakdown
  - Greeting and engagement
  - Speaking
  - Media (photo + video)
  - Follow-up (thank you emails, welcome emails to new members, and posts to social media)
- A call to action or ask

**An educational event can be an effective tactic for both building a relationship with your target and helping them to understand your issue.**



## TIPS FOR SUCCESS

1. Prepare for changes in plans. If it rains on your outdoor event, your speaker is running late, or you might have technical issues, have a backup plan to keep things running smoothly. That being said, mistakes happen. Embrace it!
2. Keep it simple. Don't overcomplicate your event with too much information or topics of discussion. You can include additional—but not crucial—information in your follow-ups
3. Remember your goals. Planning an event is a lot of work, especially if you're working with other organizations to put it on. Ensure that the effort you are putting in will help you to reach your goals and advance your strategy.
4. Make it fun, make it personal. Treat this event like a small gathering of friends. You want everyone in attendance to feel welcome and included. This will help you to build strong relationships with your community.

## LETTERS 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, especially 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 own home or office. As a tactic, they don't need to take too much time from any one individual, but they can have a major impact. However, as a campaign leader you will need to take time to recruit volunteers to write and submit LTEs, and it's important to consider the timing – is it better to send many at once, or to send them steadily over the weeks. And while it can be done alone, there are also steps at the end for hosting an LTE party and getting volunteers together.

Most LTEs function as an advocacy tool to educate the community and 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

#### DECIDE ON YOUR OUTLET

You can use the tool [50states.com](http://50states.com) and [onlinenewspapers.com](http://onlinenewspapers.com) to look up over 3,000 newspapers across the country. Narrow your search to 2-3 based on your state and the cities and zip codes in your target's district. 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.

### 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.



#### 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 if available.

**STEP 3****BEGINNING, MIDDLE,  
AND END**

Begin with “Dear Editors.” Keep it short and to 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 – what you want done or changed. 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.

**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; Advocacy Chair) and which chapter or state office you belong to at the bottom of the page under your name. Submit to the newspaper via e-mail or using their 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 additional review from your chapter leader, members, or a state office representative. You can also reach out to us at [campaigns@audubon.org](mailto:campaigns@audubon.org) and a staff member will get back to you within 24-48 hours. Plan ahead of time before you submit.

**HOLDING AN LTE  
WRITING PARTY**

If you’re trying to build your organization and support one another, getting people together for an LTE party can be a way to engage volunteers, build your community, and make sure people follow through on this tactic. You can hold an LTE party as an independent event, or at the end of a chapter meeting.

**TIPS FOR SUCCESS**

1. Do not submit the same each letter more than once to a newspaper if it has already been published.
2. Make sure it’s clear who you are—newspapers only accept letters from real people.
3. Stay focused on the issue. Do not engage in an argument ad hominem (an attack on a person or group of people.)
4. Stick to your talking points and statements that can be backed up by facts if people want more information.

**TIPS FOR A SUCCESSFUL LTE  
WRITING PARTY:**

1. Have the information available on where attendees can send LTEs
2. Have talking points and a sample letter handy, but make sure volunteers are not just copying the same LTE
3. All LTEs these days will be submitted electronically, so make sure you have volunteers bring their own tablets or laptops, or have a couple that can be shared
4. If you’re meeting in person, bring snacks!
5. As the leader, either have a plan to help volunteers follow up with their submissions, or have someone else assigned to this task

	LETTER TO THE EDITOR SAMPLE
<div data-bbox="776 529 841 592" data-label="Image"></div> <div data-bbox="430 642 1185 672" data-label="Section-Header"> <h3>LETTER TO THE EDITOR: EXAMPLE TEMPLATE</h3> </div> <div data-bbox="384 726 453 753" data-label="Text"> <p><i>[date]</i></p> </div> <div data-bbox="384 758 711 785" data-label="Section-Header"> <h4>LETTER TO THE EDITOR</h4> </div> <div data-bbox="384 789 695 816" data-label="Text"> <p><i>[insert contact information here]</i></p> </div> <div data-bbox="384 867 511 894" data-label="Text"> <p>Dear editors,</p> </div> <div data-bbox="384 930 1232 1022" data-label="Text"> <p>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 <i>[number of birds]</i> which spend part of the year in <i>[insert state name]</i>.</p> </div> <div data-bbox="384 1024 1230 1182" data-label="Text"> <p>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, the U.S. Fish and Wildlife Service will allow businesses a free pass to kill all birds with practices that endanger them, and are even known to kill them, but are not deemed purposeful or intentional.</p> </div> <div data-bbox="384 1184 1237 1276" data-label="Text"> <p>As a concerned citizen and as a member of the National Audubon Society with <i>[personal story and reason for caring]</i>, I am deeply concerned about this. I call upon my legislators to protect and strengthen the MBTA.</p> </div> <div data-bbox="384 1312 493 1341" data-label="Text"> <p>Thank you,</p> </div> <div data-bbox="384 1375 1003 1404" data-label="Text"> <p><i>[name, title, Audubon chapter or state office, contact information]</i></p> </div>	



## SIGNATURE COLLECTION DRIVES

Collecting signatures and delivering them to your target both demonstrates your issue's widespread support and is one of the best tools for recruiting new members. These signatures can be collected in the form of a traditional petition, a testimony, or letters and postcards. No matter the medium you choose, a collection drive will help you demonstrate your power and build up a list of potential recruits. 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.

You are gathering the names of individuals who potentially care about the issue. Include a box on your petition form or sign-up sheet that asks signers if they want to volunteer, along with a line to fill in their phone number and/or e-mail 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 more signatures. 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. One person might collect 40 signatures in two hours, which means that if you can get 10 people to commit to two hours, you could 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 signature collection drive can be done in one day, or it can stretch across several days or a month. It can even last an entire campaign! It depends on how many names your campaign requires.

There are many ways to collect signatures, offline or online. Signature collection can take the form of a petition, a written testimony, or a postcard. You can collect these in person by hosting your own event, tabling at someone else's event, or even getting signatures canvassing on the street. There are also several platforms to make these available online. Your campaign plan and organizational considerations can help inform your choice of what format to use and how to deliver it. Whenever possible, having both offline and online options is ideal.

Keep the language concise, use active and direct verbs, and avoid acronyms and jargon. After you write your petition or postcard message, 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. Do not forget to make a script of what to say when gathering signatures. Finally, make sure you have a volunteer checkbox for everyone who signs. 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. Set a goal for each person. Adjust as you discover your campaign's success rate. You want to keep goals achievable, aggressive, and motivational.
5. Look out for potential recruits. Ask every person who signs on to check the volunteer box.

**STEP 2****RECRUIT YOUR TEAM**

Now that you know how many signatures or sign-ups you'll need to hit your goal, it's time to start recruiting volunteers. If you know you need 6 volunteers to ensure you hit your goal, then you need to create a plan to recruit them. Generally, about half the people who say they're going to show up to do something actually do. Knowing that, we can set a goal of getting 12 people to sign up for a shift, so that 6 people will actually show up.

In order to get 12 people to sign up, we need to have about 24 conversations with people, as half of them will say no outright.

You can likely begin by talking to your chapter and your personal network. If you are starting from scratch, go out by yourself first in order to get some names. You don't need all 24 people right at the get-go; you can recruit and build your team over time.

**STEP 3****CONFIRM LOCATION AND SHIFTS**

Adjust your plan according to your method of signature collection. If petitioning on the street, prioritize constituencies and areas that are most impacted by your issue—choose high traffic spots like grocery stores or town squares. If tabling, find a local neighborhood or attend a public event. It's a good idea to change up where you go and which volunteers go there to keep everyone interested.

As the date approaches, it is important to confirm details. People can flake: they're tired, they woke up in a bad mood, the weather isn't perfect, they hit a stressful period in their lives. That's why we have to confirm shifts with people. If someone has agreed to do a petition or tabling shift with us, we should follow up with them three times: a week before the shift to confirm details, the day before to remind them, and a few hours before their shift starts 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.



**photo by:**  
National Audubon Society

**STEP 4****DELIVER YOUR SIGNATURES**

When the timing is right, based on your campaign plan and timeline, print and collect your petitions, postcards, etc. Make an appointment with your target or target's staff and deliver your package to the target's office. When you're at the office, be polite and concise about the purpose behind your visit. 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 on all of your social media accounts, making sure to tag and thank the elected official, and send them to us via [campaigns@audubon.org](mailto:campaigns@audubon.org).

**STEP 5****FOLLOW UP WITH YOUR NEW SUPPORTERS**

Send a 'Thank You' letter to the office on the same day or within 24 hours of making contact with the decision maker and their staff as appropriate. 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.

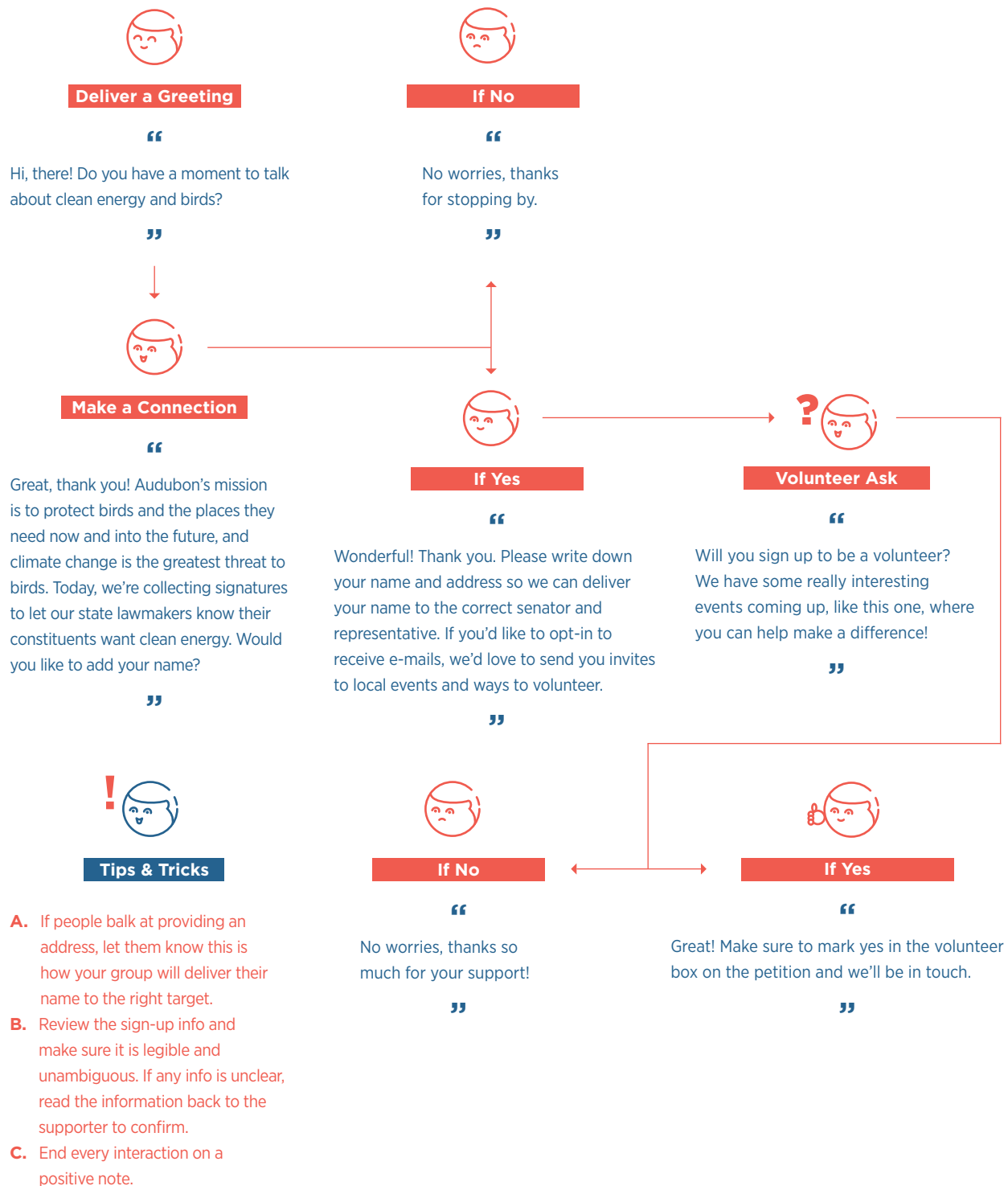
**TIPS FOR SUCCESS**

1. Build a team! This is more successful if you're not on your own.
2. Approach others, and be approachable—don't stay seated by a table or in one place when canvassing.
3. If someone just wants to argue, move on—you won't convince everyone.
4. Remember in-person signature drives are more powerful if they're possible. goal for each person working. Adjust as you discover your campaign's success rate. You want to keep goals achievable, aggressive, and motivational.
5. Keep focused on your positive vision. Don't create negative and/or hyperbolic messages.

**Collecting signatures and delivering them to your target is one of the best tools for recruiting new members.**

## SIGNATURE DRIVE SCRIPT TEMPLATE

69



## SPECIAL FOCUS: 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. It is a popular campaign tactic for a reason: it's an opportunity to be highly vocal and visible to a diverse group of people and plenty of new recruits. In addition, it's a great chance to build relationships with the other organizations present at the event. Tabling makes face-to-face interactions focused and fun, and helps you build power. Tabling is just one of many ways you can build your list of names or signatures, but it's one we highly recommend. Read on for our list of tabling tips (and think of how these tips might help you in other name gathering contexts!)



### WE'RE ALWAYS ASKED WHAT INTROVERTS CAN DO TO HELP A CAMPAIGN. AND THE ANSWER IS LOTS!

Handling the organizing or logistics, keeping track of signatures and putting them in a volunteer database, and making all of your materials are just some of the behind-the-scenes tasks that will make the campaign a success.



### TIPS FOR SUCCESS

1. Contact supermarkets, conference organizers, farmers markets, community events, etc. in your area and find out if you can table there. Make sure to ask if there is a fee to participate and if tables are provided.
2. Before: Take time to train your volunteers. Fill them in on your issue and action, and make sure they feel comfortable with their script. Don't forget the logistics: who will arrive when, and what will each person bring? Where can a new shift leader 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.
3. Post flyers on social media channels and in newsletters, and communicate to your members that you will be at the event. The more people who know where to find you, the more people who will stop by and interact with your campaign.
4. Come prepared with double what you need for the entire duration of the event—that means both materials, and people to run the table. Materials could include: copies of the petition or postcards, fact sheets, clip boards, etc., as well as giveaways like stickers and pencils (if you have the budget).
5. Have a specific pitch prepared. How will you ask the passerby to take action?
6. During the event, actively engage by standing in front of the table to greet people. Avoid sitting down or eating while you're on your shift.
7. Use a simple petition as a conversation starter and ask everyone to join/volunteer for an upcoming event.
8. Make a closeout plan for who will be responsible for gathering all of the signatures at the end of the day and kicking off next steps. Whether that's putting names in a spreadsheet, sending out a welcome email, or assigning those responsible for delivery, you don't want to waste the momentum you just worked so hard to build.



## SAMPLE PETITION TEXT

**SAMPLE PETITION TEXT: CLEAN ENERGY EXAMPLE****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,

*[Signatures]*



## MEETING WITH A LEGISLATOR

Meeting with a decision maker is a key and fundamental element of our democracy. In many cases, we have the ability to go directly to our decision maker or their staff and speak to them about an issue that matters. Meeting with a decision maker is your opportunity to let them know how they can help. When your decision maker is an elected official, you are, in some ways, their boss—you helped get them in to office, and you get to have a say in how they operate. Using your voice to speak up on the issues that you care about is one of the most democratic actions you can take.

**Senators and Representatives often have time during the year to return to their district. Look at their schedule to determine when they'll be in the district and try to schedule meetings then.**

### STEP 1

#### MAKE AN APPOINTMENT WITH YOUR DECISION MAKER

Audubon is a resource for you. Before setting up a meeting, check in with National Audubon and your state office to see what issues we're working on. If these issues align, contact us so we can give you resources to set you up for success.

Depending upon the decision maker and the time of the year, setting an appointment can be a challenge. If your decision maker is an elected official, it might be harder to meet with them during a legislative session. At a minimum, call your legislator's office several weeks in advance of the date you want to meet, tell the scheduler (if one exists) how many attendees you anticipate having, and identify the subject matter you want to discuss. If you're contacting a decision maker at the local level, it might be easier to get a meeting scheduled. The general rule of thumb is that the higher the elected office and more people they represent, the more advance notice you'll need for an appointment.

Be patient and persistent when reaching out to the office. Some decision makers or schedulers 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. If your decision maker is an elected official at the state or national level, you might be meeting with a staffer and not the elected official. Do not be upset; staffers report back to their bosses and your message will be heard.

Not sure who your elected officials are? Use the tool [www.openstates.org](http://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.

**STEP 2****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@audubon.org](mailto:campaigns@audubon.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. Visit the decision maker's official website. Search for biography, press releases, issue pages, and news stories—what message do you think will work best with your decision maker based on your research?

**STEP 3****ASSEMBLE 3-4 PEOPLE AND ASSIGN 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 Group Leader, Ask Maker, and Storyteller. The Group Leader is typically the chapter leader, volunteer leader, or Audubon state staffer. Responsibilities include introducing the group, introducing the issue, describing the problem, and closing the meeting. The Ask Maker understands the key points of each issue and can back statements with supporting evidence or facts. They can clearly articulate a concise and urgent message directly to the decision maker. They make the "ask" of the meeting – what they hope the decision maker will do coming out of this meeting. The Storyteller 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.

You want to bring a strategic group of individuals who each take a different approach to changing your decision maker's mind. If you know your target is a veteran, for example, bring someone with military experience. Aim for a group size of four to six people.

**STEP 4****PRACTICE IN ADVANCE AND ATTEND THE MEETING**

Meet up before the meeting to practice what you and your team will say in the meeting. See below for a sample script. 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, list their affiliations and memberships, be prepared to answer potential questions, or, if there are questions you can't answer, promise to get back to the legislator, and make your ask. Your ask is a concrete action that has a 'yes' or 'no' answer. If the decision maker 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 decision maker 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. During the meeting, ask if you can take a picture with the elected official.

**STEP 5****SAY THANK YOU**

Meet up before the meeting to practice what you and your team will say in the meeting. See below for a sample script. 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, list their affiliations and memberships, be prepared to answer potential questions, or, if there are questions you can't answer, promise to get back to the legislator, and make your ask. Your ask is a concrete action that has a 'yes' or 'no' answer. If the decision maker 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 decision maker 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. During the meeting, ask if you can take a picture with the elected official.

**STEP 6****EVALUATE**

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? You're going to learn a lot from your decision maker. Take notes on what they say, and who they listen to. Use these notes to evaluate how to best follow up. Then debrief your performance and check in with your team members on highlights of the conversation.

**TIPS FOR SUCCESS**

1. Arrive early to make sure everyone is prepared.
2. Prepare your talking points prior to the meeting.
3. Have a strategic group of people, and remember they should be constituents!
4. Have a strong ask in the meeting.
5. Be polite, even if the decision maker disagrees with you.
6. Remember to follow up.



### SAMPLE CALLING SCRIPT FOR A SCHEDULER OF AN ELECTED OFFICIAL:

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.



---

**photo by:**  
National Audubon Society



“

## SAMPLE SCRIPT FOR MEETING WITH A SUPPORTIVE DECISION MAKER:

”

● **Senator Rodriguez:**

Good morning everyone.

● **Group Leader:**

*[shakes hand]* Good morning, Senator Rodriguez. 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 Rodriguez. 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 Rodriguez:**

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 Rodriguez:**

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 20 minutes today still work for you?

● **Senator Rodriguez:**

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.



“

## ROLEPLAY SAMPLE SCRIPT (CONT.)

”

● **Senator Rodriguez:**

Thank you! As you may know, growing up in Pintail Springs, 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, drive safer cars, and live happy and healthier lives.

● **Senator Rodriguez:** 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 not yet been able to address. This issue is affecting cab drivers, and senior healthcare and transportation service providers. Just last week, a survey showed that the lack of charging stations was the number one reason a business wouldn't switch to electric cars.

● **The Ask Maker:**

As the city struggles to keep up with the demand of electric vehicles and charging stations, we're seeing this affect renters and in particular 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 pinch, too. As an independent cabbie myself, I often struggle to make ends meet with an electric vehicle. In fact, I am making \$5,000 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 Rodriguez:**

This must create an unimaginable hardship, but if we are 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



“

## ROLEPLAY SAMPLE SCRIPT (CONT.)

”

78

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 Rodriguez:**

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 Rodriguez:**

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 Rodriguez:**

Thursday at noon—yes that works for me.

● **The Ask Maker:**

Great, what is the best email to reach you by?

● **Senator Rodriguez:**

[rodriguez@house.state.md.gov](mailto:rodriguez@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 Rodriguez:**

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 Rodriguez:**

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!



## MEDIA OUTREACH

Almost every campaign will want to use traditional media outlets (print, TV, radio) to raise awareness of your issue, to help with general awareness and recruitment, and/or to increase pressure on your decision maker. When you power-map your targets, make note of what outlets they read, watch, and listen to regularly. Usually, the easiest way to tell this is to research where they do the most interviews or have placed their own op-eds or letters to the editor. You'll also want to consider which outlets are likely to reach people who are potential volunteers or allies for your campaign.

As you work to identify the right outlets for your issue and campaign, keep in mind that they may not be the largest in the area. You need to reach the right people, not just the most people (though sometimes both!). During your research, keep a list of outlets that hold interest for your audiences—decision makers and volunteers.

Once you've got a list of outlets, read through the content and try to identify the reporter(s) who have covered topics similar to your issue. That might be someone reporting on the decision-making body (i.e., the reporter who covers City Hall or the State Legislature) or someone who covers the subject matter (such as conservation, local parks and projects). You'll want to start a list of all the reporters who could potentially be interested in your campaign, knowing that different pitches, tactics, or events might appeal to one more than others as you go. Make sure you include community and trade publications, such as those on special topics, with whom you share an audience (such as widely shared newsletters).

Track this list in a spreadsheet, like the example here, so you can find the reporter's information easily. Make sure your sheet includes the outlet, the reporter's name, contact information, and beat (what topics they cover), and the editorial or assignments desk email. This is usually easy to find on an outlet's contact page.

## CONTACTING REPORTERS

Once you have your list of reporters, you are ready to start contacting them. If time allows, you might want to reach out to key reporters (those at your most important outlets) to invite them to get a coffee and discuss

TACTICS					
EXAMPLE OF MEDIA SPREADSHEET					
OUTLET	The Daily Paper	The Daily Paper	TV4	Parks Now	
TYPE	Newspaper	Newspaper	TV Station	Newsletter	
REPORTER	Matt Mallard	Lakshmi Warbler	Jo Bunting	Leticia Larkspur	
BEAT	City Hall	Parks & Tourism	Good News Stories	Parks in our state	
EMAIL	<a href="mailto:Mmallard@tp.com">Mmallard@tp.com</a>	<a href="mailto:lwarbler@tdp.com">lwarbler@tdp.com</a>	<a href="mailto:Jobunting@tv4.com">Jobunting@tv4.com</a>	<a href="mailto:mleticia.larkspur@email.com">mleticia.larkspur@email.com</a>	
PHONE	123-456-7890	234-567-8900	999-321-8765	N/A	
TWITTER	@mmallard2	@lakshmiw_tdp	@JoTV4news	@ParksNowLL	
ED DESK	<a href="mailto:eddesk@tdp.com">eddesk@tdp.com</a>	<a href="mailto:eddesk@tdp.com">eddesk@tdp.com</a>	<a href="mailto:Assignments@tv4.com">Assignments@tv4.com</a>	<a href="mailto:Leticia.larkspur@email.com">Leticia.larkspur@email.com</a>	

## 81

your issue. Spending 30 minutes giving them some information and background can be a great help, especially in the modern media age where reporters are more likely to be generalists who may not be steeped in the subject area of your issue. If you aren't able to get a hold of the reporter, don't worry – they are busy and have a million requests for their time and attention.

## REACHING REPORTERS ON TWITTER

Most reporters are very active on Twitter, and following their feeds is a great way to keep up with their work. Make sure you're following them from all relevant Twitter accounts (the campaign's, your chapter's, and/or your own).

## PITCHING A STORY

When you have an idea for a story, such as a vote on relevant legislation, you should put together a “pitch” to send reporters. This is a short message that should include the 5 W's: who, what, where, when, why. The subject is important, and should appropriately convey any urgency. And it is good practice to copy the editorial or assignment desk email on your pitch – sometimes a different reporter will be assigned to your story by an editor because of schedules or changes in beats/coverage.

You'll want to follow up in a few days if you don't hear back; timing will depend on the pitch. In our example it's for a vote, so we'll remind the reporters the morning the vote is scheduled and then follow up after the vote with an update (vote results), any press release you've prepared, and/or a quote or two from experts and leaders in the movement. You want to make it as easy as possible for the reporter to write the story.

## SEND A PHOTO

If you invite a reporter to an event or pitch them a story and they don't respond, or if they express interest but cannot attend, consider submitting a few pictures of your event to them with captions. Newspapers will often print pictures with a brief caption without a full story. Since you'll be taking pictures of your events and meetings anyway, this is a good way to make the most of it.

---

**photo by:**  
Luke Franke/Audubon





## SAMPLE PITCH



## INITIAL PITCH

**SUBJECT: VOTE FRIDAY—CLEAN ENERGY FOR [OUR CITY]**

Hi *[reporter name]*,

Around 2pm this Thursday, *[date]* the City Council will be voting on the 100% clean energy bill. We believe the vote will be close, but we have reason to believe that we will prevail. Our coalition has prepared the attached fact sheet on the issue, and have several advocates and experts available for interview or comment this week. Please contact me to set up an interview with anyone listed below.

Media availability all week from:

- *[Name]*, President of Audubon *[Chapter Name]*
- City Council Member *[Name]*
- List anyone who will be available, willing, and prepped to speak to media about the issue (before the vote or immediately after)

This bill is a critical step for our community to protect the places and birds we love so much. Please reach out to me with any questions, or to schedule an interview with any of our available experts.

Thank you,

*[XXX]*



## SAMPLE PITCH



## FOLLOW UP

**SUBJECT: RE: VOTE FRIDAY—CLEAN ENERGY FOR [OUR CITY]**

Hey there—

A reminder that the City Council will vote today on the 100% Clean Energy bill. We're looking forward to its passage, and have media availability with experts and movement leaders this morning from 10am–1pm. Let me know if you'd like to speak to one of them, and we'll get you on their schedules.

Thanks,

[XXX]



## SAMPLE PITCH



## PART TWO

**SUBJECT: RE: VOTE FRIDAY—CLEAN ENERGY FOR [OUR CITY]**

Hi [reporter],

I wanted to let you know that the City Council just PASSED the 100% Clean Energy Bill by a vote of 8-5! Our press release is attached, along with a photo of Councilmember XXX with our campaign leaders immediately following the vote.

While we wait for the Mayor's signature, we are thrilled by this historic vote.

Regards,

[XXX]

# 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, and 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; using 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.

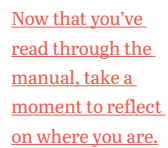
In **Chapter Four: About Tactics** we defined tactics; shared strategies to pick the most effective tactics; gave adaptive strategies for when your campaign needs to change; and outlined how to put together a campaign timeline from launch to evaluation.

In **Chapter 5: Tactic Examples** we walked through examples of key tactics, such as how to hold an LTE writing party; inviting elected officials to a bird tour; conducting media outreach; and hosting educational events.

In order to take on the vast conservation issues impacting birds, we must keep all of these skills and our 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. As you begin your campaigns, don't be afraid to experiment and make mistakes, but be sure to learn and grow from them staying anchored in the skills and strategy you've learned here.

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 the future. Now it's time to roll up our sleeves, get to work, and build a movement for birds and people together.

**There are few things  
as beautiful as  
people realizing their  
collective power to  
change the world  
and shape the future.**







## WELCOME TO YOUR FIELD GUIDE FOR CHANGE

### AUDUBON CAMPAIGN ADVOCACY MANUAL

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

# Glossary

## Ally

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

## 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 them a question that forces them to take a stance on an issue publicly.

## 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.

## Core Team

The standing leadership of any campaign team. At least 3-4 people responsible for making the decisions and ultimately accountable for tracking and executing the campaign.

## Cover Strategy

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

## Decision Maker

Person(s) with the primary power to decide your issue. Examples could include elected officials, such as a mayor or member of congress; the head of a regulatory body, such as a state utility commission; or the head of a business or corporation. The tactics in this manual primarily apply to elected officials.

## Elevator Pitch

Thirty second explanation of your issue and your ask that can be delivered quickly to an influencer or decision maker.

## Evaluation 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.



*photo by:*  
Luke Franke/Audubon

**Grassroots**

Community members and volunteers who take action on an issue.

**Grasstops**

Leader with influence in the community and power to rally many grassroots members, or to influence decision makers. Examples of grasstops leaders include the head of a community association, a business leader in the community, members of the clergy, or even a well-known school principal or football coach in some regions.

**Hard Ask**

A clear, ambitious ask with a yes or no answer to a volunteer or recruitment prospect. Would start with, “Will you...”, “Can I count on you to...”, or similar language.

**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)**

An LTE is an opinion or statement sent to a newspaper that localizes and/or personalizes an issue, usually in less than 250 words.

**Mountain-top Stage**

The point where your campaign reaches maximum mobilization.

**One-on-One**

Standard organizing and relationship-building tool. 20- to 30-minute meeting with a potential volunteer to identify their self-interest and recruit for a team, or to discuss partnerships with a leader.

**Op-Ed**

An opinion piece published in a newspaper by a person with some standing or expertise on an issue. Longer than a Letter to the Editor (LTE), generally 500-750 words.

**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 and demonstrate 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 series of phonecalls between you or your volunteers and current or potential members of your campaign to make an ask.

*photo by:*  
National Audubon Society



**Political or Legislative Power**

Political or legislative power is based in elections relative to your ability to impact the target's self-interest.

**Power**

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

**Power-mapping**

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, with one or more scheduled speaker.

**Press Release**

A press release is a written communication that reports specific but brief information about an event that is provided to the media.

**Pressure Strategy**

A strategy focused on building pressure through a series of tactics.

**Recruitment**

The process of bringing new individuals into your campaign.

**Relationship Building**

The process of growing trust and partnership with volunteers, other coalitions partners, grasstops, or even decision makers.

**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 used to frame your ask during a one-on-one, a house meeting, or petition-gathering.

**Snowflake Model**

Used to distribute leadership opportunities to a group of committed individuals and grow a manageable team.

**Soft Ask**

A gentle ask or suggestion for a volunteer or recruitment prospect. May be used when still moving someone up the ladder or early on. Likely starts with "Would you consider...", "Would you be interested...", or similar language.

**Story of Self, Us, Now**

Popular organizing tool that explains why you are engaged in an issue, why others should be engaged in the issue, and why it is urgent to address right now.

**Strategy**

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

**Strategy Chart**

An advocacy and planning tool used to make campaigns meaningful, strategic, and realistic.

**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 power, apply pressure to a target, and advance your goals. Tactics must be done BY someone, TO someone.

**Target**

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

**Team Members**

Everyone part of your advocacy committee or otherwise engaged in the campaign in a reliable way, helping with regular meetings and planning.

**Theory of Change**

How you think change happens and how and why you're going to win; overarching framework for how you plan strategy and tactics.

**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?
2. What is your desired outcome?
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?

APPENDIX A:

# Theory of Change Worksheet


	THEORY OF CHANGE WORKSHEET		



## APPENDIX B:

# Strategy Chart or Campaign Framework Planning Tool Worksheets

CAMPAIGN FRAMEWORK PLANNING TOOL WORKSHEET				
<b>STRATEGY:</b> <i>In one to two sentences, develop a summary of the strategy for your campaign. What is your plan to win?</i>				
GOALS	ORGANIZATIONAL CONSIDERATIONS	DECISION MAKER (TARGET)	POWER ANALYSIS	TACTICS
<p><b>LONG-TERM</b> <i>What do you really want? Your vision.</i></p> <p><b>INTERMEDIATE-TERM</b> <i>The campaign goal. (Note there can be multiple intermediate goals to achieve your long term goal).</i></p> <p><b>SHORT-TERM</b> <i>A step towards achieving the intermediate goal.</i></p>	<p><b>RESOURCES</b> <i>Determine key roles, what assets you have, what assets you will need, your budget, and any planned partner activities.</i></p> <p><b>ORGANIZATIONAL GAINS</b> <i>List three to five measurable outcomes that will grow out of the campaign. For example, increased # of activists, members, enhanced reputation, new donors, etc.</i></p> <p><b>INTERNAL CONSIDERATIONS:</b> <i>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.</i></p>	<p><b>START WITH TARGETS FOR SHORT-TERM GOAL</b></p> <p><b>TIER 1 TARGETS</b> <i>List the names and titles of the decision maker who can get you what you want.</i></p> <p><b>TIER 2 TARGETS</b> <i>List the names and titles of the individuals who can influence your Tier 1 targets to get you what you want.</i></p> <p><b>TIER 3 TARGETS</b> <i>List the names and titles of the individuals who can influence your Tier 2 targets to get you what you want.</i></p>	<p><b>COALITION PARTNERS</b> <i>List three to five or more coalition partners that you plan to coordinate with around the issue.</i></p> <p><b>ALLIES</b> <i>List three to five (or more) partners that will not join your campaign through a coalition but may demonstrate support for the issue.</i></p> <p><b>CONSTITUENTS</b> <i>Identify your target group, community, or people who can join as members in support of your campaign.</i></p> <p><b>OPPONENTS</b> <i>Identify two to three (or more) opponents who will devote resources to ensuring your campaign does not win.</i></p>	<p><b>ACTIONS</b> <i>Identify specific actions planned for the campaign and done to the target, in alignment with strategy.</i></p>

 <b>CAMPAIGN FRAMEWORK PLANNING TOOL WORKSHEET</b>				
<b>STRATEGY:</b> <i>In one to two sentences, develop a summary of the strategy for your campaign. What is your plan to win?</i>				
GOALS	ORGANIZATIONAL CONSIDERATIONS	DECISION MAKER (TARGET)	POWER ANALYSIS	TACTICS
LONG-TERM	RESOURCES	TIER 1 TARGETS	COALITION PARTNERS	ACTIONS
INTERMEDIATE-TERM	ORGANIZATIONAL GAINS	TIER 2 TARGETS	ALLIES	
SHORT-TERM	INTERNAL CONSIDERATIONS:	TIER 3 TARGETS	CONSTITUENTS	
			OPPONENTS	

## APPENDIX C:

# Power-mapping Exercise

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]*.


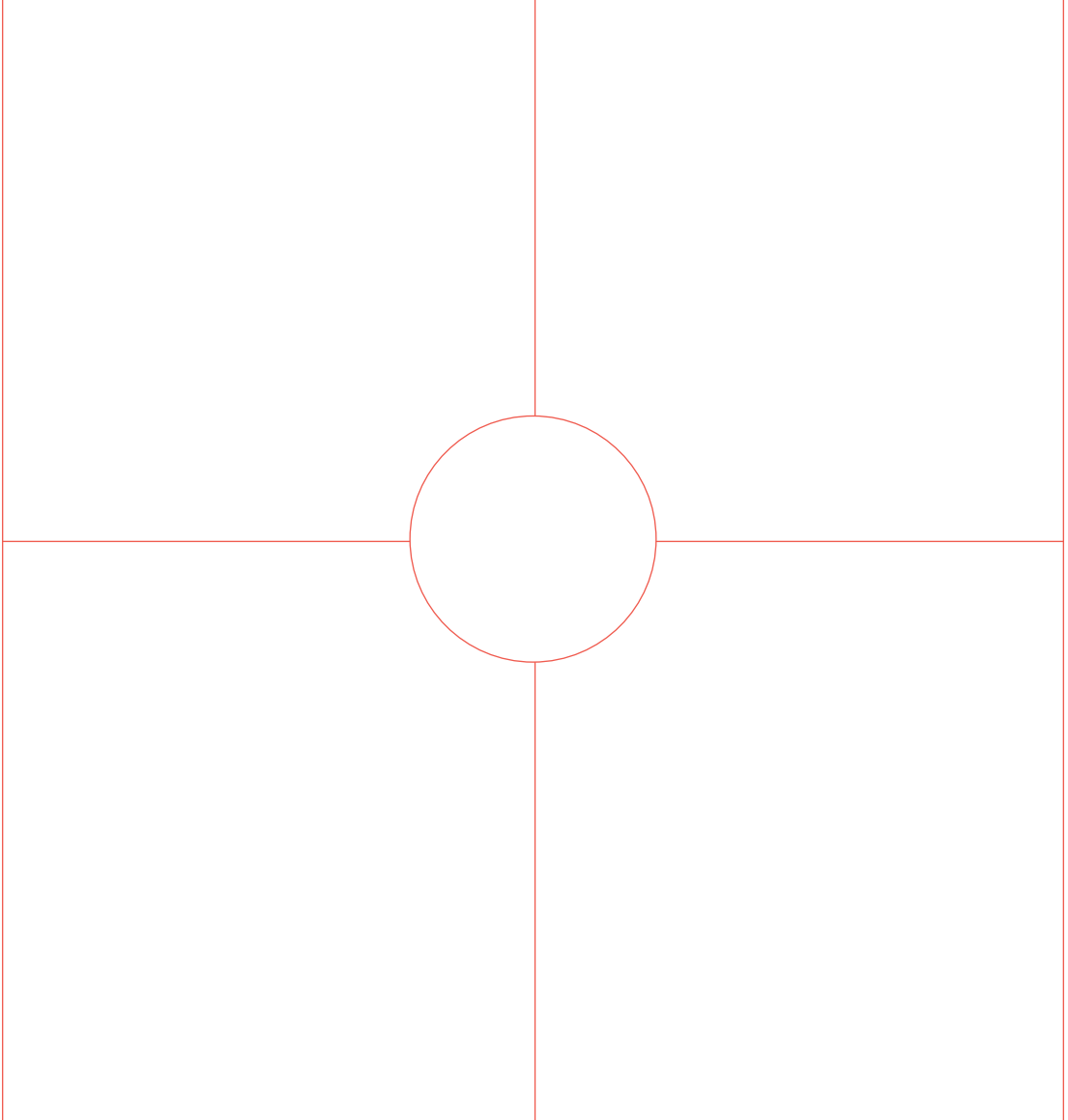
## APPENDIX C:

# Power Map Worksheet

95




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

	POWER-MAPPING EXERCISE
	

APPENDIX D:

# Target Strategy Worksheet

	TACTICS
YOUR TARGET STRATEGY	
CHOOSE YOUR STRATEGY (HERO/COVER/PRESSURE):	
LIST OUT YOUR TACTICS:	

## APPENDIX E:

# Example Field Plan

Your Field Plan outlines your campaign's strategy to build and execute your campaign's people power. The following is an example field plan that can be used as a template.

## Strategic Overview and Objectives

Briefly explain your campaign strategy (using your strategy chart) and your overall campaign objectives and goals. Reference these objectives and overall strategy at every section and decision outlined in the field plan.

## Programmatic Tactics

Outline the tactics your campaign plans to utilize. Explain how your tactics feed into your strategy and objectives.

## Goals

Give your tactics numeric goals and group these goals into tiers, based on importance.

## Roles and Responsibilities

List your field team and describe what tactics each member will be responsible for.

## Timeline

Insert major deadlines (paperwork deadlines, election date, etc.) and note what phase your campaign will be in during each month. Then add the corresponding volunteer recruitment and tactical goals you have for each month that will support your campaign's plans and hitting your final objectives.

 TACTICS	
<b>TIER 1 GOALS</b>	
IN-PERSON PETITION SIGNATURES	15,000
DIGITAL PETITION SIGNATURES	25,000
BUSINESS SIGN-ONS	250
LOBBY DAY MEETINGS (W/TARGETS)	10
SENATE/HOUSE MEETINGS (BY AUDUBON STAFF)	5
<b>TIER 2 GOALS</b>	
LTES SUBMITTED	30
LTES PUBLISHED	12
HOUSE CONSTITUENT CALLS	60
SENATE CONSTITUENT CALLS	150
<b>TIER 3 GOALS</b>	
CHAPTER SIGN-ONS	9
CAMPUS CHAPTER SIGN-ONS	4



## APPENDIX E:

# Example Field Plan

TACTICS			
EXAMPLE TIMELINE			
Please note that this field timeline does not outline the entirety of a campaign and is intended to serve as an incomplete example.			
DATE	TACTICAL GOALS	POINT PERSON	EVENT TYPE
<b>FEBRUARY 2021</b>	Final Planning Study, Polling contracts, Kick off meeting	Amar, Chelsea, Gina, All	Planning
2/24	Kick-off meeting	Chelsea	Webinar
2/24-3/1	Follow up: Manual Download; Link to Toolkit (box); Online petition?; Asks for chapter sign on (Wake, Asheville)		
<b>MARCH 2021</b>	Petition: 3,200; volunteer recruitment 10 new/captain; Digital petition: 1,500; Business Sign On: 100; Chapter Sign on: 5	Organizers, Amar, Chelsea, Gina	Field, Chapter, Comms
3/2-8	Petitions: 300 Volunteer Recruitment: 0 Chapter Sign On: 3	Organizers Organizers Gina	Field Field Chapter
3/9-15	Petitions: 600 Digital Petitions: 500 Volunteer Recruitment: 3 Business Sign On:	Organizers Chelsea Organizers Amar	Field Comms Field Field
3/16-22	Petitions: 800 Digital Petitions: 500 Volunteer Recruitment: 3 Chapter Sign On: 3 Business Sign On: 40	Organizers Chelsea Organizers Gina Amar	Field Comms Field Chapters Field
3/23-29	Petitions: 900 Digital Petitions: 500 Volunteer Recruitment: 5 Business Sign On: 40	Organizers Chelsea Organizers Amar	Field Comms Field Field
<b>APRIL 2021</b>	Petition: 4,000 Volunteer recruitment 25 new/captain Digital petition: 750 LTEs: 20 submitted Business Sign On: 150 Chapter Sign On: 4	Organizers, Amar, Chelsea, Gina	Field, Chapter, Comms

APPENDIX F:

# Ladder of Engagement Worksheet


69

ORGANIZER / ADVOCATE
LEADERSHIP PROSPECT
TEAM MEMBER
VOLUNTEER
SUPPORTER

*chart adapted from:*  
Marshall Ganz,  
Harvard University


## APPENDIX G:

# Tabling Checklist

	<b>TACTICS</b>
<b>TABLING CHECKLIST</b>	
<ul style="list-style-type: none"><li>❑ LANGUAGE FOR THE PETITION</li><li>❑ SCRIPT FOR VOLUNTEERS</li><li>❑ SETUP SCHEDULE</li><li>❑ SCHEDULE OF VOLUNTEERS</li><li>❑ TABLECLOTH AND TABLE DECORATIONS</li><li>❑ PINS OR T-SHIRTS FOR VOLUNTEERS</li><li>❑ CLIPBOARDS (AT LEAST ONE PER VOLUNTEER)</li><li>❑ COPIES OF PETITION/POSTCARD</li><li>❑ PENS AND PENCILS</li><li>❑ INFORMATION TO HAND OUT</li><li>❑ BREAKDOWN PLAN AND SCHEDULE</li><li>❑ ASSIGNMENT FOR RECORDING SIGNATURES</li><li>❑ ASSIGNMENT FOR KEEPING SIGNATURES</li><li>❑ FOLLOW-UP PLAN</li></ul>	

## APPENDIX H:


# Educational Event Checklist

	TACTICS
<h3>EDUCATIONAL EVENT CHECKLIST</h3>	
<ul style="list-style-type: none"> <li>❑ SIGN-IN SHEET AND/OR PETITION</li> <li>❑ LOCATION</li> <li>❑ NECESSARY AUDIO-VISUAL EQUIPMENT               <ul style="list-style-type: none"> <li>• Computer, projector and screen, microphone, speakers</li> </ul> </li> <li>❑ TABLES AND CHAIRS</li> <li>❑ SWAG (IF BUDGET ALLOWS)               <ul style="list-style-type: none"> <li>• Stickers, pins, hats, posters</li> </ul> </li> <li>❑ REFRESHMENTS (IF BUDGET ALLOWS)</li> <li>❑ INFORMATIONAL MATERIALS</li> <li>❑ BROCHURES, FLYERS, FACT SHEETS</li> <li>❑ VOLUNTEERS FOR THE FOLLOWING ROLES:               <ul style="list-style-type: none"> <li>• Outreach and planning</li> <li>• Setup</li> <li>• Breakdown</li> <li>• Greeting and engagement</li> <li>• Speaking</li> <li>• Media (photo + video)</li> <li>• Collecting sign-up sheets and, if applicable, petition or postcards</li> <li>• Follow-up (thank you emails, welcome emails to new members, and posts to social media)</li> </ul> </li> <li>❑ A CALL TO ACTION OR ASK</li> <li>❑ PLAN FOR DELIVERY OF PETITION OR POSTCARDS (IF APPLICABLE)</li> </ul>	

APPENDIX I:

# Sample Sign-in Sheet

In any sign-in sheet, make sure you have enough room for people to write their address and e-mail. It's okay to have a smallish number on each sheet—more sheets look more impressive, and you want to make sure people provide their full e-mail and address. Address is especially important if you are delivering sign-ons to elected officials and need to show someone is a constituent. E-mail and Phone Number are for your contacts. And don't forget to ask if they're interested in volunteering!

	TACTICS			
SIGN-IN SHEET				
NAME	E-MAIL	PHONE NUMBER	ADDRESS	INTERESTED IN VOLUNTEERING?

## APPENDIX J: Media Planning Template

TACTICS					
SIGN-IN SHEET					
DATE/ TIMING	COMMUNICATION VEHICLE	AUDIENCE	COMMUNICATION PURPOSE & CTA	RESPONSIBLE DEVELOPER(S)	NOTES/ COMMENTS
Jan 5	Kick off Event	Chapter members General public City Council Champion (speaker)	Educate on issue Thanks to Champion  CTA: Sign petition	Team Member Name	Email invites: 12/15, 12/30,1/3 Reminders: 1/

Sample  
Row



#### 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.