

How to Launch A Campaign

INTRODUCTION & OVERVIEW

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

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

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

Section 1

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

Section 2

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

Section 3

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

Section 4

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

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

The campaign strategy chart included in this chapter is a field -and time- tested tool for structuring and organizing a campaign plan. The chart we use is based on the one created by the Midwest Academy, the premier national advocacy training organization. Whether you're looking to target a legislator to endorse a bill, move a CEO to change their business practices, or encourage a federal agency to permanently protect an important bird area, it is how and when you do things that will determine your success.

photo by:
Luke Franke/Audubon



SECTION 1

CREATING A VISION FOR CONSERVATION OUTCOMES

A vision is your most important tool. A vision is a clear statement describing the future that you want to live in and are working to create. Think of it as a North Star that guides your campaigns.

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

A vision is a tool that:

Inspires action

Draws people in and encourages new ideas.

Creates a plan

Guides planning and sets goals to make decisions.

Keeps groups organized

Commits groups to working together to achieve a goal.

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

For example, Audubon's climate campaigns are not explicitly against the fossil fuel industry, but rather we are FOR properly sited, clean energy. Framing your vision as a proactive message reinforces its clarity and connection. Another way we can successfully communicate a vision is by saying, "We believe that expanding solar power will create a safe and livable world for birds and people." OR "We believe that having all of our city's electricity sourced from clean, renewable technologies will help other places do the same." OR "We believe that by growing native plants, we can create thriving communities for birds."

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

photo by:
Luke Franke/Audubon



FUNDAMENTALS OF EFFECTIVE AND WINNING CAMPAIGNS

WHAT IS A CAMPAIGN AND HOW DOES IT WORK?

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

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

WHEN DO YOU DECIDE TO RUN A CAMPAIGN?

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

Example:

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

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

You've run out of options: It's time to launch a campaign to build power so they cannot ignore or deny you anymore.



A WINNING CAMPAIGN CONTAINS THE FOLLOWING

1. **GOALS**
A clear articulation of what you want.
2. **TARGETS**
Decision makers who have power over whether your goal is met or not.
3. **STRATEGY**
A statement that describes your big-picture plan to win.
4. **TACTICS**
The smaller actions you take to implement your strategy. Strategy informs tactics, but tactics never inform strategy—and tactics always come last in campaign planning.

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

SECTION 2

HOW TO CREATE A CAMPAIGN PLAN USING THE STRATEGY CHART

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

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

Here some things to have ready:

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

STRATEGY CHART

CAMPAIGN FRAMEWORK		SEE APPENDIX C		
STRATEGY: <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 <i>What do you really want? Your vision.</i>	RESOURCES <i>Determine key roles, what assets you have, what assets you will need, your budget, and any planned partner activities.</i>	TIER 1 TARGETS <i>List the names and titles of the decision maker who can get you what you want.</i>	OPPONENTS <i>Identify two to three (or more) opponents who will devote resources to ensuring your campaign does not win.</i>	ACTIONS <i>Identify specific actions planned for the campaign and done to the target, in alignment with strategy.</i>
INTERMEDIATE <i>The campaign goal. (Note there can be multiple intermediate goals to achieve your long term goal).</i>	ORGANIZATIONAL GAINS <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>	TIER 2 TARGETS <i>List the names and titles of the individuals who can influence your Tier 1 targets to get you what you want.</i>	CONSTITUENTS <i>Identify your target group, community, or people who can join as members in support of your campaign.</i>	
SHORT-TERM <i>A step towards achieving the intermediate goal.</i>	INTERNAL CONSIDERATIONS: <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>	TIER 3 TARGETS <i>List the names and titles of the individuals who can influence your Tier 2 targets to get you what you want.</i>	COALITION PARTNERS <i>List three to five or more coalition partners that you plan to coordinate with around the issue.</i>	
			ALLIES <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's clear, measurable, and you must be able to win it. In many cases for issue campaigns, this means that a public vote will either grant or deny you your goal. If there is no vote or decision point, then it is an objective and belongs in the 'Organizational Considerations' column.

Not a goal

Keep birds safe in Smithville.

Not a goal

Build a coalition of 200 businesses.

A goal

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



photo by:
Lauren McCullough/Audubon



THERE ARE THREE TYPES OF GOALS

1. LONG-TERM

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

2. INTERMEDIATE

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

3. SHORT-TERM

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

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

COLUMN TWO: ORGANIZATIONAL CONSIDERATIONS

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

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

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

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

COLUMN THREE: DECISION MAKER (TARGET)

A target is the person who has power to give you what you want.

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

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

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

COLUMN FOUR: POWER ANALYSIS

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

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

HOW TO DO A POWER ANALYSIS

1

IDENTIFY YOUR OPPONENTS

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

Questions to help you identify opponents (groups and individuals):

- Who wants to see you fail?
- Why do they oppose you? How does opposing you align with their interests?
- Which groups/individuals have been against similar issues in the past?

2

IDENTIFY YOUR CONSTITUENTS & ALLIES

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

Questions to help you identify constituents and allies:

- Who is already on my side? Who is committed to this issue already?
- Who cares or should care about my issue, is greatly impacted by it, and has something to win or lose depending on the outcome of the campaign?

3

IDENTIFY POTENTIAL PARTNERS

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

Questions to help you identify your potential partners:

- I might not have power with my target, but who out there does?
- Who do people listen to in my community?
- Who shapes the media narrative in our community?
- Who could be convinced to care about this issue?

This is one way to visualize a power map. Fill in this chart for both your decision makers and your primary opponents; it's important to understand your opponents as well as your targets.

REMEMBER:

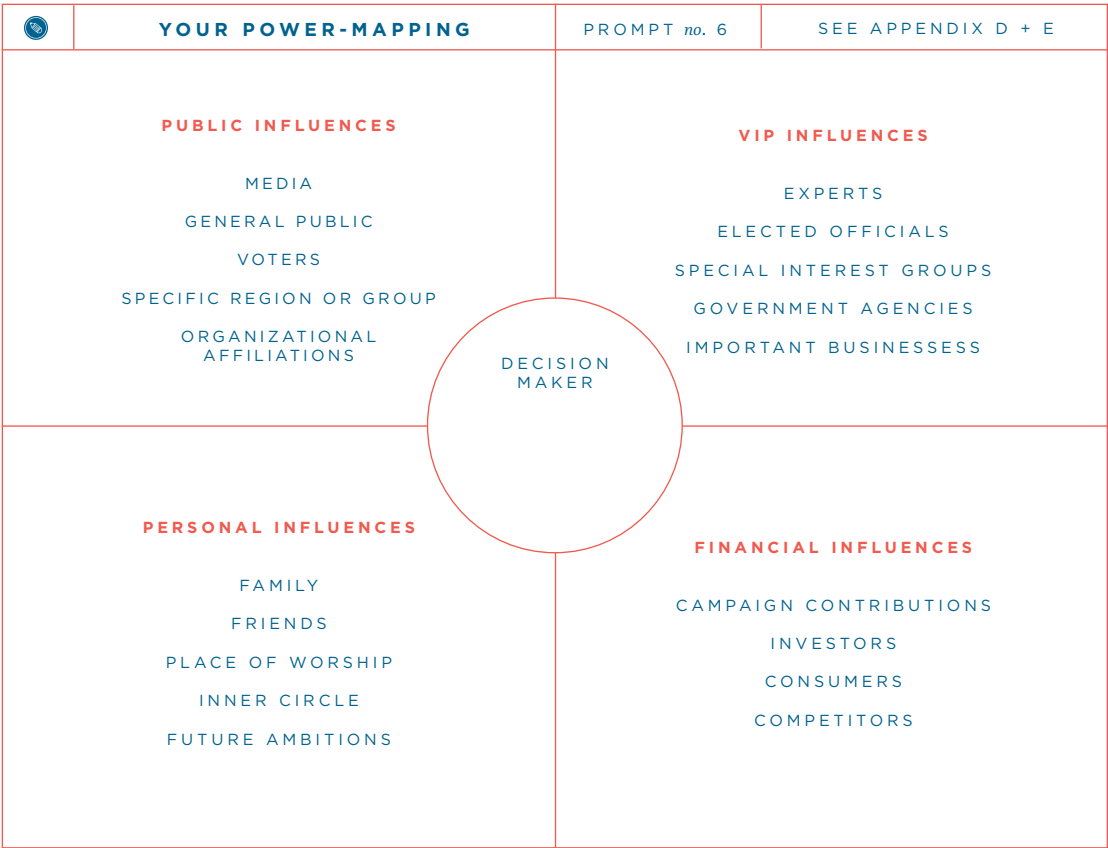
1. Who has the power to give you what you want?
2. Who are the less powerful players that have power or influence over the decision maker?
3. Who of these have the most power or influence?

HOW TO USE THE POWER MAP:

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

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

Using the directions above, complete this power-mapping chart



COLUMN 5: TACTICS

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

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



SECTION 3

TESTING YOUR AUDUBON CAMPAIGN

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



THREE-STEP PROCESS

1. **GOALS**

Are your goals realistic?

2. **STRATEGY**

Is your strategy solid enough to weather any abrupt changes (legal, political)?

- What would happen if your decision maker resigns from office?
- What if you realize you focused on the wrong target?
- What if you needed grassroots pressure, but your volunteers stop showing up?

3. **TACTICS**

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

photo by:
Luke Franke/Audubon

SECTION 4

AUDUBON MESSAGE DEVELOPMENT

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

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

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

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

SO, HOW DO WE WRITE A MESSAGE?

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



1. Who is your target audience, specifically?

The “general public” is not an audience.

Consider:

- Who do you need to move to your side in order to show momentum?
- Who did you list as potential allies in your strategy chart?
- Who are the people/groups that you need on your side in order to get your decision maker to take action?



2. Who is your base?

- Who are your best supporters, constituents and allies - people who are already with you on the issue?
- Who do we need to continue to excite - and what excites our base?



OPPOSITION

3. Who is your opposition?

- Almost every single campaign (regardless of scope and size) has an opposition – you cannot leave this blank.
- What is your opposition saying? What is their messaging? How can we get in front of it?



TARGET

4. Who are your targets?

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



7 ESSENTIALS FOR A GOOD MESSAGE

1. **CLEAR**
Simple and easy to understand.
2. **CONCISE**
Brief and to the point.
3. **CONNECTED**
Relates directly to the local community and what is happening right there right now.
4. **COMPELLING**
Connects on an emotional or gut level (not just an intellectual one) with the targeted public audience, and communicates a sense of urgency.
5. **CONTRASTING**
Something only your side can claim, and clearly distinguishes between the two choices (Good vs. Evil).
6. **CREDIBLE**
Not only factual, but also “rings true.”
7. **CONSISTENT**
Overarching frame for all campaign communication. Repeated over and over again throughout your group’s campaign communications.

adapted from:
Joel Bradshaw

24

IN ORDER TO CRAFT
THE BEST MESSAGE,

We need to know what matters to our audience.

1. What messages or themes excite our base?

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

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

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

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

5. What messages or themes resonate most with your decision makers?

- Refer back to your power-mapping: What did it reveal about the things your decision maker cares about most?

6. How do we ensure our messaging is inclusive and highlights the diversity, partnerships, and specific voices we want to see in our campaigns?

- Do we have the right voices in the room while we're drafting this message?
- These questions are best answered by reaching out to your surrounding community.

We need to create a story that is inclusive, compelling, timely, and to the point.

ONCE YOU ANSWER
THESE QUESTIONS,

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

1. What research/stats/facts do we need to round out our messaging?

- Be sure to provide citations for any data used.

2. What is our opposition's response messaging?

- What are the messages that would most damage our campaign and how would we respond?

3. Which media sources and outlets do your main target/their influencers pay the most attention to?

- In what outlets have they published op-eds or been quoted as sources in news stories?

4. What existing messaging content can we learn from or use?

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

NOW WE'RE READY

Let's draft our messaging:

1. What are your overarching talking points?

- What are the three to five main talking points (short statements that summarize your point) that support that message?

2. List the three to five specific audiences you are targeting,

- What are the top messages these audiences need to hear, if different from your overarching talking points?

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

photo by:
Luke Franke/Audubon



