

Tactics & Timelines

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TACTICS

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

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

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Section 1

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

Section 2

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

Section 3

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

Section 4

Explore key adaptive strategies to implement on the fly.

Section 5

Focus on the ideal campaign timeline from launch to evaluation. As your campaign grows, we will figure out how to identify when you've reached the "mountain top."

Grassroots campaigns are powered by people.

INTRODUCTION TO TACTICS

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

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

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

SECTION 1

WHAT ARE TACTICS?

Tactics are targeted actions designed to demonstrate your power, pressure your target, and advance your goals.

Effective tactics mobilize your volunteers to take strategic action, gets direct attention about a specific issue, and strives to achieve a specific objective. Every tactic is different, but they all move your campaign in the same direction towards a goal.

Some advocacy-related examples may include:

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

Beware! A decision maker will not always be moved by your tactics, especially if you do not base them in your strategy and power maps. Demonstrating power is more than directing clicks to sign a petition. It involves real people showing up to key meetings and making their voices heard loud and clear. Demonstrating power is about being more strategic than your opposition.

SECTION 2

TACTICAL CRITERIA AND PRINCIPLES FOR ADVOCACY CAMPAIGNS

Audubon advocacy is all about empowering real people to harness real power to win real campaigns. A tactic is most effective when it meets these criteria: lots of people, all in one place, and face to face with targets. We believe tactics should be informed by the creativity and talent of the people deploying them.

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

1. Strategic

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

2. Strengthens your state office, chapter or group

Your tactic attracts and engages new people to further your campaign's capacity to work together to make change.

3. Develops individuals

Your tactic builds on the leadership, skills, and capacity of your constituency.

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

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



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SWEET SPOT DIAGRAM

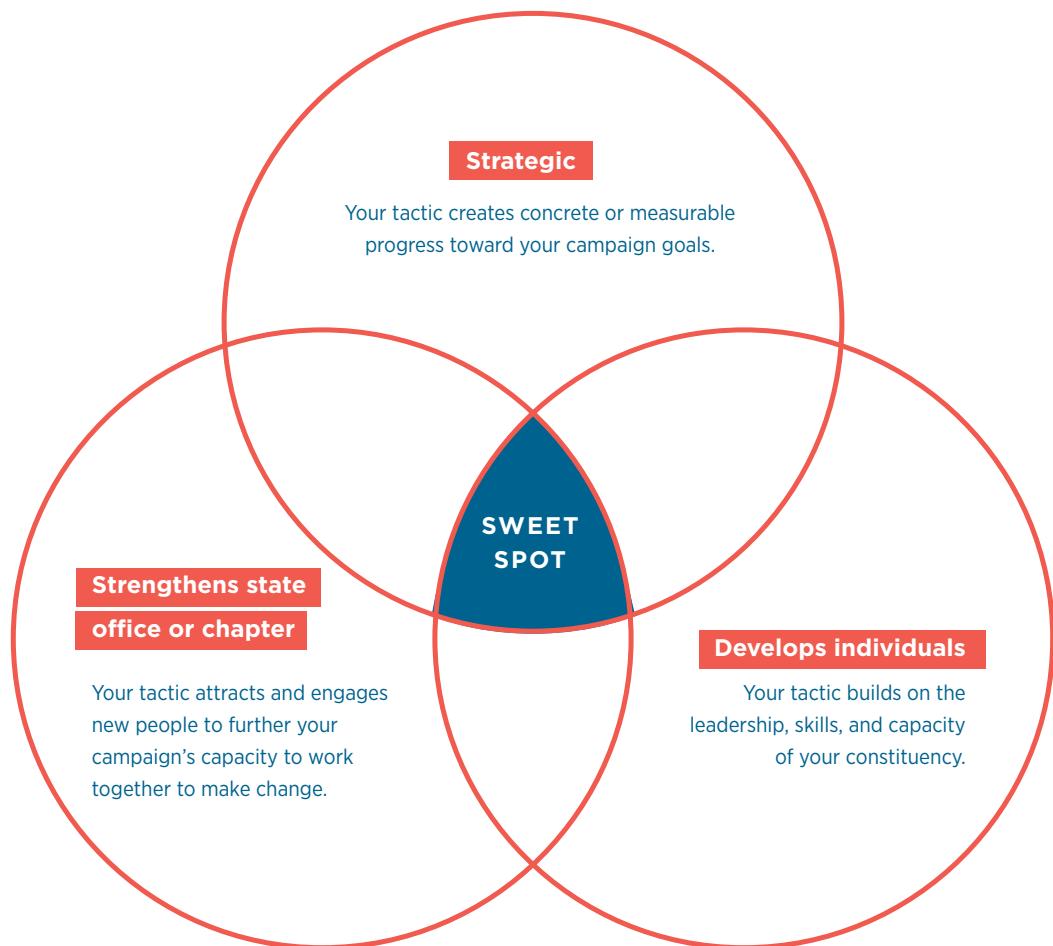


chart adapted from:
Marshall Ganz,
Harvard University

SUCCESSFUL CAMPAIGNS
REQUIRE TACTICS TO
ACHIEVE GOALS

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

CAREFULLY PLAN YOUR TACTICS' OBJECTIVES TO

Demonstrate Collective and Coordinated Power

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

Shape and Solidify Leadership of the Campaign

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

Bring You Closer to the Vision and Long-term Goal

Tactics are important to your campaigns because they help break down your vision, strategy, and overall goals into smaller steps.

HOW NOT TO USE TACTICS

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

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



PITFALLS TO AVOID

1. Moving forward with a tactic when your power-mapping is incomplete or lacking sufficient information on your opposition/allies.
2. Implementing a tactic simply because you heard it from someone else or another state office/chapter/organization.
3. Overestimating your power to compel action.
4. Directing a tactic on an entity that is not an individual or group with decision-making authority (though you can target a decision maker within an entity).

SECTION 3**HOW DO YOU CHOOSE A TACTIC?**

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

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

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

**SECTION 4****WHY TACTICS SOMETIMES FAIL**

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

**TACTICAL CHOICES MUST BE PRIMARILY INFLUENCED BY:****1. CAPACITY**

Your team's capacity to execute the action.

2. ANALYSIS

Power analysis of target and opponent.

3. RISK

Tolerance for risk.

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ADAPTING A TARGET STRATEGY

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

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

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

Fill out your target strategy chart in Appendix H.

 TACTICS	PROMPT no. 11	SEE APPENDIX H
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>Potential Hero Tactics:</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>Potential Cover Tactics:</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>Potential Pressure Tactics</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>

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SECTION 5**CAMPAIGN TIMELINES**

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

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

UNDERSTANDING THE RHYTHM OF AN ADVOCACY CAMPAIGN

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

Foundation

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

Kickoff

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

Peaks

After the kickoff, the campaign starts to gain momentum. A string of peaks function as tactical milestones and each peak should have a measurable outcome. For example, number of people at a rally, number of signatures, number of organizations pledging support, etc. Your campaign makes progress when every peak aligns with a target and the result brings you closer to your goals.

Mountaintop Goal

The point where your campaign reaches maximum mobilization. This peak is often carefully planned by lead campaigners. During this period, your goal is to have reached a high level of capacity.

Evaluation and Next Steps

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

CAMPAIGN TIMELINE GRAPH



chart adapted from:
Marshall Ganz,
Harvard University

CAMPAIGN STRATEGY FRAMEWORK CHART

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

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

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

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

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

Tactics always come last.

APPLYING WHAT YOU HAVE LEARNED IN THIS LESSON

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

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

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

TACTICS IN DETAIL



HOW TO ORGANIZE A PETITION DRIVE

read more on page 54

HOW TO HOLD A TABLING EVENT

read more on page 58

HOW TO PHONEBANK

read more on page 60

HOW TO WRITE A LETTER TO THE EDITOR

read more on page 66HOW TO HOLD A MEETING
WITH A LEGISLATOR*read more on page 69*HOW TO THANK YOUR
CONGRESS MEMBER*read more on page 76*

HOW TO HOLD A PRESS CONFERENCE

read more on page 78

HOW TO BIRDDOG

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HOW TO ORGANIZE A PETITION DRIVE

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

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

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

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

STEP 1

SET A TIMEFRAME AND GOAL

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

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



TIPS FOR SUCCESS

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

STEP 2**RECRUIT YOUR TEAM**

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

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

STEP 3**CONFIRM LOCATION AND SHIFTS**

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

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

STEP 4**DELIVER YOUR PETITION**

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

**PITFALLS TO AVOID**

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

PETITION SCRIPT



Deliver a Greeting

“

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

”



If No

“

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

”



If Yes

“

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



Tips & Tricks

- A. If people balk at providing an address, let them know that is how Audubon will deliver their name to the right target.
- B. Review the sign-up info and make sure it is legible and unambiguous. If any info is unclear, read the information back to the supporter to confirm.
- C. End every interaction on a positive note.



Close the Conversation

”

Thank you again for supporting our campaign. Have a great day.

”



	PETITION TEXT SAMPLE
	
PETITION TEXT SAMPLE	
<p>Support 100% Clean Energy in Washington State</p>	
<p>Dear Washington State legislators:</p>	
<p>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.</p>	
<p>Sincerely, <i>[insert your name here]</i></p>	

**TIPS FOR SUCCESS
FOR HOW TO HOLD A
TABLING EVENT**
(pg. 58)

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. Come prepared with enough campaign materials for the entire duration of the event. Materials could include: petitions, posters, fact sheets, etc., as well as any freebies like stickers and pencils (if you have the budget).
3. Have a specific pitch prepared: What do you want to ask passersby to do?
4. Actively engage by standing in front of the table to greet people.
5. Use a simple petition as conversation starter and ask everyone to join/volunteer for an upcoming event.

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HOW TO HOLD A TABLING EVENT

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

STEP 1**FIND AN EVENT AND DETERMINE YOUR GOALS**

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

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

STEP 2**BE PREPARED**

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

STEP 3**DURING THE EVENT, ACTIVELY APPROACH PASSERSBY**

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

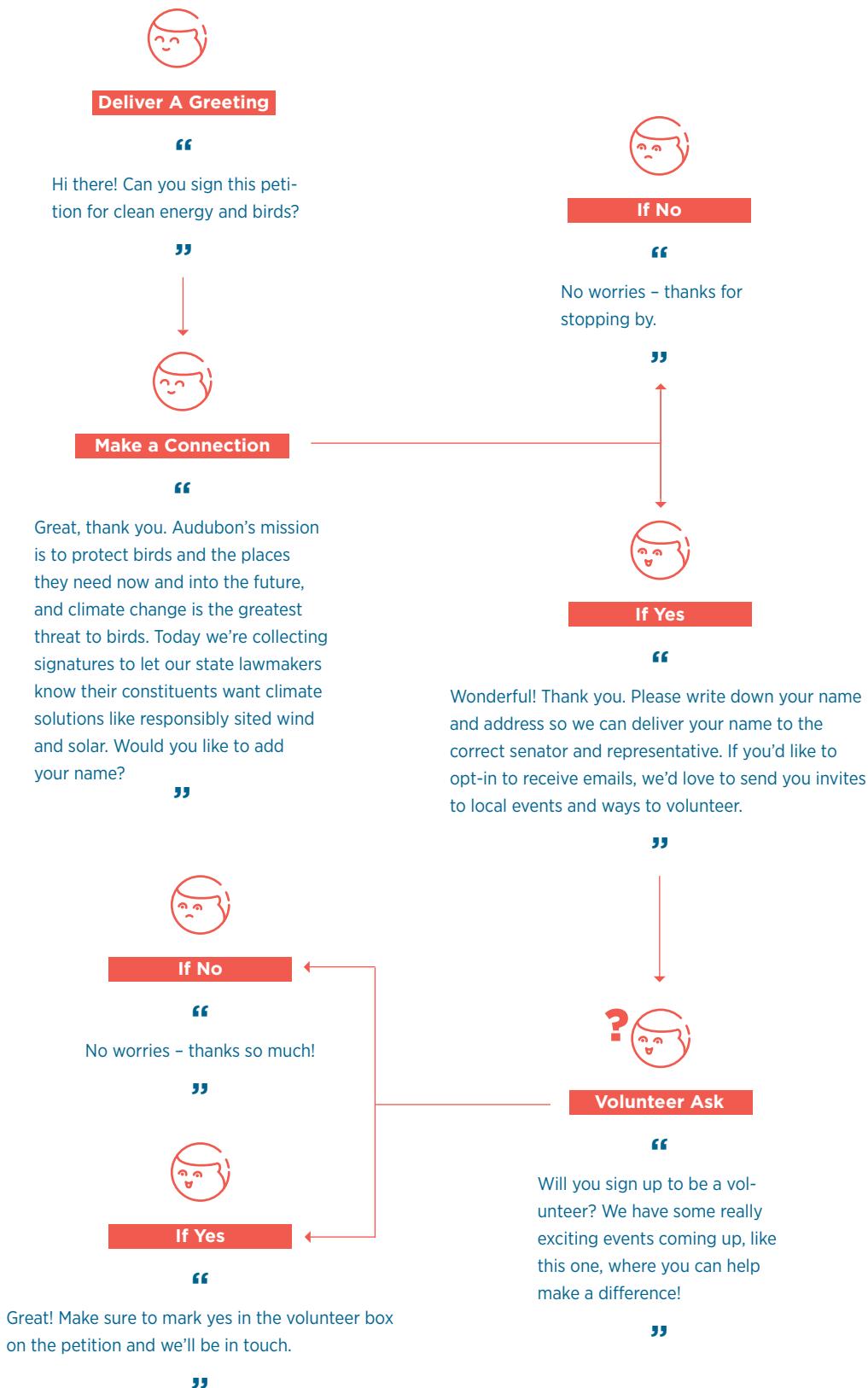
STEP 4**FOLLOW UP WITH YOUR NEW SUPPORTERS**

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

**PITFALLS TO AVOID**

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

TABLING SCRIPT TEMPLATE



HOW TO PHONEBANK

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

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

1. Volunteer Recruitment

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

2. Event Recruitment

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



TIPS FOR SUCCESS

1. Always have a script.
2. Aim to call your constituents between 5:00pm and 9:00pm. Weekends are great too; try between 12:00pm and 7:00pm.
3. Track your responses and follow up as soon as possible.



photo by:
National Audubon Society

STEP 1**SET A PHONEBANKING GOAL AND FIND A VENUE**

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

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

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

STEP 2**GETTING THE NUMBERS**

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

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

STEP 3**CREATE MATERIALS AND A SCRIPT**

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

Materials should include:

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

STEP 4**RECRUIT, RECRUIT, RECRUIT!**

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

STEP 5**TRAIN YOUR PHONEBANKERS PRIOR TO THE EVENT**

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

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

PHONEBANK TIPS:

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

Remember to set each phonebanker up with a specific set of goals for their shift. If they're phonebanking for two hours, a good goal would be: six yeses to action from 12 phone conversations. Goals keep people motivated, and keep them dialing.

STEP 6**WRAP UP AND RECAP
THE DAY'S RESULT**

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

**PITFALLS TO AVOID**

1. Do not rely solely on volunteers' own phones or data plans to make calls. You can look into using google voice, using office lines (if office space is available), using campaign budget (if available) to purchase phones, or other alternatives.
2. Do not forget to bring snacks or other food.
3. Do not expect or anticipate volunteers to stay longer than two hours.

photo by:
Luke Franke/Audubon



PHONEBANKING SCRIPT
USAGE: NEW SOLAR ENERGY CAMPAIGN KICK-OFF AND INVITE



Greeting



Connect with Caller

Hello, is **[their name]** there?. Hi **[their name]** this is **[your name]** from Audubon **[insert State]**, we met when you signed a petition to support the solar campaign; how are you? **[listen and respond]**. Great! I just wanted to give you a call to thank you for signing the petition (today/yesterday, etc.) and to tell you about an upcoming event. **[pause]**

“

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

“



Layout the Problem



“

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

“



Provide the Solution

“

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

“

Explain the issue urgency:

“

Our state legislators will act only if they know that there is widespread public support to remove financial roadblocks to solar. We have a short legislative session, so we need to act now.

“



Action

“

That's why we're kicking off 2019 by launching an exciting campaign right here in *[insert town]*! We'll be building a local coalition, gathering petitions, gaining media attention, and more to push *[insert state]* in the right direction. To make it happen, we'll need a lot of people involved, so we're asking everyone who has signed a petition to join us at our upcoming kick-off meeting. Our campaign kickoff event is this *[insert date and time]* at the *[location]*. It'll be a great way to meet other people who care about this issue, hear about our strategy for the spring, and take action. It'll also be a lot of fun. Can you come to the kick-off meeting on Wednesday evening?

”



If Yes

“

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

Awesome, the campaign organizer's name is *[first name]* and you can reach them at *[insert phone number]*. don't hesitate to reach out if you have any questions.

[insert address] Thanks again, and we'll see you at *[time]* this Wednesday at *[name of location]*.

”



If No

“

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

”



If Yes

“

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



If No

“

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

”



End

“

Thanks again for supporting the campaign—have a good night.

”

HOW TO WRITE A LETTER TO THE EDITOR

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

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

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

STEP 1

RESEARCH 2-3 LOCAL NEWSPAPERS

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



TIPS FOR SUCCESS

1. Follow the newspaper or publication's rules for submitting an LTE.
2. Typically, LTEs are between 150 and 250 words. If your LTE is too long, there is a very high likelihood it will not be accepted. If it is, your important points could be edited out by the publication's editor; better to edit it down yourself to choose which points are most important to your campaign.
3. If a number is listed, call to ensure they received your LTE submission.
4. Do not give up! Published or not, it may have been an extremely busy period for the newspaper. Submit to other local outlets.

STEP 2**KNOW YOUR TALKING POINTS**

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

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

Begin with “Dear Editors.” Keep it short and 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. 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.

**PITFALLS TO AVOID**

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

STEP 4**PROOFREAD AND SUBMIT**

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

	LETTER TO THE EDITOR
	
LETTER TO THE EDITOR: MBTA EXAMPLE TEMPLATE	
<p><i>[date]</i></p>	
<p>LETTER TO THE EDITOR <i>[insert contact information here]</i></p>	
<p>Dear Editors,</p>	
<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 [NUMBER OF BIRDS] which spend part of the year in the [INSERT STATE NAME].</p>	
<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 David Bernhardt, the U.S. Fish and Wildlife Service will allow businesses a free pass to kill birds with practices that endanger them, and are even known to kill them, but are not deemed purposeful or intentional.</p>	
<p>As a concerned citizen and as a member of National Audubon Society with <i>[personal story and reason for caring]</i>, I am deeply concerned about this. I call upon my <i>[federal legislators]</i> to protect and strengthen the MBTA.</p>	
<p>Sincerely,</p>	
<p><i>[name of writer]</i> <i>[writer's title]</i> example: volunteer, chapter member <i>[Audubon chapter and/or state/national]</i> <i>[contact information (phone, email)]</i></p>	

HOW TO HOLD A MEETING WITH A LEGISLATOR

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

STEP 1

MAKE AN APPOINTMENT WITH YOUR LEGISLATOR

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

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



TIPS FOR SUCCESS

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



SAMPLE CALLING SCRIPT FOR A SCHEDULER:

“

Hello, my name is **[your name]**, and I'm calling as a constituent and a member of the National Audubon Society. I'm wondering if there is any availability to meet with **[insert name of elected official]** on **[insert day, month, and year]** between **[insert times]**. Would this time work for you? We'd like to discuss issues relating to clean energy and conservation. There are going to be five of us in attendance.

”

STEP 2**BUILD A TEAM OF 3-4 PEOPLE AND ASSIGN TIME MANAGEMENT ROLES**

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

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

STEP 3**IDENTIFY TOPICS AND TALKING POINTS**

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

STEP 4**ROLE PLAY AND ATTEND THE MEETING**

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

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

STEP 5**SEND A THANK YOU LETTER AFTER THE MEETING**

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

STEP 6**EVALUATE**

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

**PITFALLS TO AVOID**

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

photo by:

Luke Franke/Audubon



ROLEPLAY SCRIPT TEMPLATE

USAGE: EFFECTIVE LOBBY DAY MEETING

Key Members of the Group

Assign the following roles as follows:

● **Group Leader:**

This person is typically the chapter or volunteer leader or Audubon state staffer. Responsibilities include introducing the group, introducing the issue, describing the problem and closing the meeting.

● **The Ask Maker:**

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

● **Storyteller:**

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



photo by:
National Audubon Society



“

ROLEPLAY SAMPLE SCRIPT

”

● **Senator Smith:**

Good morning everyone.

● **Group Leader:**

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

● **The Ask Maker:**

[shakes hand] It's a pleasure to meet you, Senator Smith. I'm **[Messenger name]** from **[Messenger's town]**. I live in the **[Messenger's neighborhood]**.

● **Storyteller:**

[shakes hand] Senator, I'm **[Storyteller name]**, also from **[Storyteller's town]**.

● **Senator Smith:**

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

● **Group Leader:**

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

● **Senator Smith:**

Have a seat. I haven't had a chance to look into this issue. Please explain.

● **Group Leader:**

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

● **Senator Smith:**

Yes, that still works.

● **The Ask Maker:**

Great. Senator, we also appreciate that you sponsored the Fight for Fifteen Act, which increases the hourly wage to \$15 by 2020. Your 'Dear Colleague Letter' in the Finance committee helped shape the direction of our state.



ROLEPLAY SAMPLE SCRIPT (CONT.)

“

● Senator Smith:

Thank you! As you may know, growing up in Silver Spring my parents worked two to three jobs and their sacrifice provided me the opportunity to go to college.

● The Ask Maker:

Thank you for sharing that with us, Senator. It's a tough economy out there and we need good paying jobs so families can afford access to higher education, drive safer cars, and live happier and healthier lives.

● Senator Smith: I agree.

● Group Leader:

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

● The Ask Maker:

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

● Storyteller:

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

● Senator Smith:

This must create an unimaginable hardship, but if we are to go 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



“

ROLEPLAY SAMPLE SCRIPT (CONT.)

”

75

and communities that need them most while spurring economic growth in new areas. As new charging stations come online, and more people choose to drive electric vehicles, the state will start seeing an immediate reduction in carbon emissions and an increase in tax revenue through new charging locations and sites. Can we depend on you for your support?

● **Senator Smith:**

This is a refreshing proposal. Do you have any more information on it?

● **The Ask Maker:**

Of course, Senator. Here is a factsheet. If you have any questions, don't hesitate to reach me. My contact information is listed on the back.

● **Senator Smith:**

I'm going to need some time to look over this, but it sounds promising.

● **Group Leader:**

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

● **Senator Smith:**

Thursday at noon—yes that works for me.

● **The Ask Maker:**

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

● **Senator Smith:**

smith@house.state.md.gov.

● **Storyteller:**

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

● **Senator Smith:**

Indeed. I look forward to staying in touch. It was a pleasure to meet with you all.

● **Storyteller:**

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

● **Senator Smith:**

I think I can take a moment for a picture, **[Storyteller name]**. And, by the way, thank you for providing safe, clean, and reliable transportation for **[your city/state]**. You're helping us meet our state climate goals!

HOW TO THANK YOUR ELECTED OFFICIAL

A Thank You letter goes a long way to building a strong and lasting relationship with your elected official. It is an advocacy vehicle used to communicate urgent messages and influence your target on what action you want them to take, as well as an impactful follow-up tactic.

As part of your campaign efforts, this tactic plays a key role in expressing your engagement plans with your target. It also solidifies your relationship and deepens your commitment to hold the target accountable to your constituent demands. Your target will be hearing from your opposition, too, and likely more often than from you, so use every opportunity you can to connect with them. The more they hear from you, the more attentive they will be and the more likely they will respond and reach out to you for updates on your campaign.

STEP 1

ESTABLISH MESSAGING POINTS

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

STEP 2

ADDRESS THE TARGET IN THE LETTER CORRECTLY

Always begin with “The Honorable.” Give thanks and remind your target how you plan to follow up with the conversation in the future.



TIPS FOR SUCCESS

1. Prioritize handwriting your letter, but be mindful of your legibility. Handwritten letters are a way to get a legislator’s attention. However, if the issue is urgent, send via email.
2. Be factual and friendly.
3. Follow the three C’s: Be concise, constructive, and courteous.
4. Be sure to include all of your contact information.



PITFALLS TO AVOID

1. Do not use your employer letterhead.
2. Do not discuss more than one issue or address a topic irrelevant to the jurisdiction of your legislator’s district, state, or constituency base.
3. Do not use threats or abusive language.



THANK YOU LETTER FOR YOUR ELECTED OFFICIAL



'THANK YOU' LETTER TEMPLATE

[date]

The Honorable [full name]

United States Senate/House of Representatives/State House or State Senate

City, State, Zip

Dear [Congressperson or Senator] [full name],

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

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

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

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

Sincerely,

[insert name]

[insert title, address]

[insert Audubon chapter]

[insert city, state, zip code]

[insert telephone]

HOW TO HOLD A PRESS CONFERENCE

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

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



TIPS FOR SUCCESS

1. Create an agenda ahead of time and fill in the gaps as you draw closer to the event.
2. Put out a press release.
3. Invite media and the public.
4. Bring snacks.

STEP 1

CREATE A WORK PLAN TO DEFINE YOUR GOALS

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

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

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

STEP 2**FIND A SUITABLE PLACE TO HOLD A PRESS EVENT**

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

STEP 3**CREATE A CHECKLIST INCLUDING EQUIPMENT, MATERIALS, AND OTHER SUPPORT**

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

Event Setup

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

Media and the Public

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

Speakers

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

STEP 4**AMPLIFY YOUR MESSAGE ACROSS MEDIA, AND PITCH REPORTERS**

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

For TV

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

For Radio

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

For Print or Online

Provide background materials like brochures, flyers, factsheets, or other sources to inform media staff about your campaign.

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

STEP 5**RUN THE PRESS EVENT AND SET A TIME LIMIT**

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



SAMPLE MEDIA PITCH CALL

“

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

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

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

”

STEP 6

ASSESS IMPACT AND EVALUATE

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



PITFALLS TO AVOID

1. Do not say anything you can't back up with facts. Your campaign may lose credibility and confidence to deliver on its vision.
2. Do not bring up anything you are not prepared to discuss.
3. Do not forget to invite the media and hand out your press release.

**FOR IMMEDIATE RELEASE: [date]****CONTACT: [name] [phone] [email]**

HOUSE OVERWHELMINGLY PASSES SOLAR ACCESS ACT (SB 145)

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

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

The bill will:

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

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

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

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

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

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

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

For more information, visit <http://ar.audubon.org/conservation/sb145-solar-access-act-2019>.

ABOUT AUDUBON

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

HOW TO BIRDDOG

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

1. Inform the Public

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

2. Educate the Target or Elected Official

Your target constantly hears from constituents and there are many issues they have to track. Be creative and tell them something they don't know. Birddogging gets their attention and makes them want to learn more.

3. Make the Target Take a Position

Targets, including legislators, are artful magicians of rhetoric and they will rarely say where they stand on an issue. Birddogging allows you to form questions that provoke a "yes" or "no".

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

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



TIPS FOR SUCCESS

1. Arrive early and figure out from where your target will be entering, where they'll be on stage, to where they'll be exiting, and where they are off to next.
2. Dress like the rest. Standing out from the flock may scare off your target from calling on you.
3. If you fail to ask your question, kick it up a notch! Find the target's exit route and find an opening to shake their hand. Don't let get the hand go until they answer your question, walk them to their car if you have to.
4. Have questions, a pen and paper, and a buddy to record your interaction with the target.
5. Share the news with the media.

STEP 1

RESEARCH YOUR TARGET'S SCHEDULE

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

STEP 2**CREATE A QUESTIONS SCRIPT**

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

A Good Question

- Focuses on a specific issue
- Puts the candidate on the spot
- Informs listeners including reporters

An Even Better Question

- Localizes the issue and makes it personal
- Applies candidate's voting record, statements, and quotes
- Is concise

Questions to Avoid

- Softball questions, like "What do you think about...?"
- Loading a question with acronyms or technical jargon
- Rambling on and on

STEP 3**IF APPROPRIATE, CREATE SIGNS, BANNERS, AND OTHER VISIBILITY TOOLS**

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

STEP 4**ATTEND AN EVENT AND DELIVER A DIRECT ASK**

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

STEP 5**DEBRIEF**

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

**PITFALLS TO AVOID**

1. Do not arrive late.
2. Do not come unprepared.



BIRDDOGGING HYPOTHETICAL AND SAMPLE QUESTIONS

SUMMARY:

Audubon is calling on city managers, mayors, and governors across the U.S. and every flyway to take a pledge to commit to clean energy by 2030. The pledge requires local and state elected officials to push for the elimination of fossil fuels including coal by 2025 and ensure all utility companies incorporate new renewable portfolio standards.

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

QUESTIONS:

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

RECOMMENDATION:

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

REMEMBER TO:

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

SUMMARY ON TACTICS

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

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

Conclusion

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

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

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

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

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

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

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

**When we
organize,
we take
flight...
and win.**



Now that you've
read through the
manual, take a
moment to reflect
on where you are.



PROMPT no. 12



REFLECTION