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AUDUBON CAMPAIGN  
ADVOCACY MANUAL

Birds Pictured: Golden-Winged Warbler



# Campaign Advocacy Manual

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WELCOME TO YOUR FIELD GUIDE FOR CHANGE

AUDUBON CAMPAIGN  
ADVOCACY MANUAL

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

# Introduction

## TAKE NOTE

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

**photo by:**  
National Audubon Society



## ACKNOWLEDGEMENTS

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

## WELCOME

If you picked up this manual, chances are you've thought about joining an advocacy cause before. Maybe you've thought: "I want to make a difference, but I don't know how." Or: "I'm just one person. No one will care what I have to say." Or maybe, this is your first time hearing about advocacy.

This manual will give you the tools to transform those feelings into power and change. The Audubon Campaigns team drew from decades of experience as campaigners and community organizers to share best practices and hard-won lessons. This manual will help you identify your strengths and develop a plan of action to get you from wherever you are now to your vision for a better world. Realizing that victory for the long-term requires running campaigns with strategic focus. It means training grassroots leaders and building relationships that will serve your goals beyond the first campaign. It demands that people with shared interests band together to realize our vision of the future, to reclaim it from special interests, and create a better world for birds and people. We need to be bold and answer with grit, generosity, and action—together.

## 02

The National Audubon Society was founded in 1905 when thousands of people banded together to respond to the feather trade, which slaughtered birds wholesale and drove some species to the brink of extinction. We have had many victories that have propelled us to this point in time – whether it was passing the strongest bird law in the country, the Migratory Bird Treaty Act (MBTA), or helping to pass a bill in Arkansas that allows more access to solar energy; at every point – it was people like you who helped us get here. Now we must continue to build off our successes—and to learn from our mistakes—to be smarter, bigger, and make more meaningful change for birds and people.

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

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

## AUDUBON'S VISION

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

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

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

## FOUR PILLARS FOR CHANGE

### 1. Durable Public Will

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

### 2. Science

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

### 3. Conservation

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

### 4. Network

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

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

## AUDUBON CONSERVATION PRIORITIES

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

**These priorities are:**

### 1. Climate

Leveraging climate science and demanding change by tapping into people's passion for birds.

### 2. Coasts

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

### 3. Water

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

### 4. Working Lands

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

### 5. Bird-Friendly Communities

Providing tools to make all communities safe for birds.

## ON EQUITY, DIVERSITY, AND INCLUSION

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

**When you're running a campaign, ask yourself:**

### 1. Am I reaching out to new people?

Campaigns are a great way to get to know your neighbors and your community. Your campaign becomes stronger by bringing unlikely allies together for common goals.

### 2. Am I always being truthful?

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

### 3. Who makes decisions in my group of advocates?

Make sure that everyone in your group has a seat at the table to help make decisions. Everyone in, nobody out.

### 4. Am I willing to go outside my comfort zone?

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

### 5. Is my campaign a place where people can make mistakes and learn from them?

As we explored above, everyone makes mistakes. Allowing your fellow advocates to make mistakes and have the opportunity to learn and grow from them is how you build a campaign that wins for the long haul.

## OVERVIEW OF THIS MANUAL



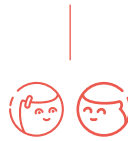
### CHAPTER 1

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



### CHAPTER 2

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



### CHAPTER 3

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



### CHAPTER 4

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



CHAPTER

1

INTRODUCTION TO AUDUBON ADVOCACY

AUDUBON CAMPAIGN  
ADVOCACY MANUAL

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





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

*photo by:*  
Luke Franke/Audubon

[illegible]

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

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

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

[illegible]

## CAMPAIGN VISION

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

[illegible]



## POWER

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

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

## BUILDING POWER

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

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



### BUILDING POWER: THE FIVE STEP PROCESS

1. **YOUR GOAL**  
Figure out what you want.
2. **YOUR ALLIES**  
Figure out who you want to work with to achieve your goal (chapter, center, friends, family).
3. **YOUR TARGET**  
Find out who has the power to give you what you want.
4. **POWER-MAPPING**  
Research to find out what influences your target, who your allies are, and where your strengths lie.
5. **CREATE A CAMPAIGN PLAN**  
Create a campaign plan, including deadlines and numeric metric goals, to actualize your goal. These measures will help you track your progress towards your goal.

We'll go over these steps in detail in Chapter 2.

DIFFERENT TYPES OF CAMPAIGNS

Audubon focuses on issue-based campaigns. However, that’s not your only option when it comes to making a difference. See below for different types of campaigns.




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

chart adapted from:  
Midwest Academy



It's your turn. Write out your five-step process to begin building your power (as listed out on page 8). Don't forget to write a clear timeline with a winning endpoint.

## INFLUENCE VS. POWER

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

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

## TYPES OF POWER

There are three types of power: visible, hidden, and invisible. All three are present in every situation you are working in as an advocate. When you are strategizing about how to influence a decision maker, think through the visible, hidden, and invisible power.

### 1. Visible

Visible power is what we think of as traditional decision-making bodies, structures, and processes like voting and elections, Congress, city councils, board votes, or state legislatures. We can clearly see how the process works, who makes decisions, and how the decisions are made. Because the decision-making is visible, you can hold decision makers accountable to their votes and the outcomes. Visible power has the most public input. Tactics for visible power generally look like community advocacy and office meetings, testimony, voter registration, and petitions.

### 2. Hidden

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

**photo by:**  
Luke Franke/Audubon



### 3. Invisible

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

## HERE'S AN EXAMPLE

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

### 1. Visible


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

### 2. Hidden

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

### 3. Invisible

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

 Now take a moment and write out what type of power you will need in order to achieve your goal. Explain why.

[illegible]

## THINGS THAT ARE NOT POWER (BEWARE!):

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

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

## SUMMARY

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

*photo by:*  
National Audubon Society





**CHAPTER**

**HOW TO LAUNCH A CAMPAIGN**

**AUDUBON CAMPAIGN  
ADVOCACY MANUAL**

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



# How to Launch A Campaign

## INTRODUCTION & OVERVIEW

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

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

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

### Section 1

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

### Section 2

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

### Section 3

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

### Section 4

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

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

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

**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.

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