

THE SIERRA CLUB

MOVEMENT ORGANIZING MANUAL

2016



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THE MOVEMENT FOR A JUST AND SUSTAINABLE FUTURE

By Michael Brune

After more than a century of unrestrained carbon pollution, decades of warnings, and escalating real-world consequences, humanity is running out of time to take meaningful action to stop climate disruption. And if we do drop the ball, we'll have no excuses to offer posterity. The same scientists who say that we must start cutting carbon emissions right now to avoid catastrophic climate change have also made it clear that our ability to succeed is limited—not by technology, resources, or economics—but by our own resolve to take action.

That resolve, though, is not something that can be marshalled by any single individual, institution, or government. Instead, it requires a powerful, inclusive movement that transcends personal or political agendas. The basic message has not changed since the groundbreaking People's Climate March that took place in New York City on November 29, 2014: "To change everything, we need everyone."

So, how do we get everyone? We begin by broadening and deepening our understanding of movement-building. Although the Sierra Club has run successful environmental campaigns for more than 100 years, that legacy alone does not enable us to meet the present challenge. Not only must we master the technologies and media of the 21st century, but we also must reach out to engage people who historically have been excluded from the environmental movement.

As this manual documents, "big green" organizations like ours have failed repeatedly, for decades, to become more inclusive and relevant to all Americans, despite growing recognition of this failure as a serious problem. The failure is especially ironic because, as is now obvious, low-income communities and people of color are logical—and effective—allies in opposing big polluters. After all, these are the people most likely to be forced to raise their children in neighborhoods with coal plants and oil refineries looming over them. Many of their communities are also on the front lines of climate disruption.

So, when we say that we are trying to "change everything," let's recognize that the change has to start right here, in our own organization. If it doesn't, we're going to have a much tougher job saving the planet.

That's right: We're here to save the world. Talk about having a meaningful job! Before you start feeling overwhelmed, we've also set some shorter-term goals that are both ambitious and achievable. First, by 2030, the U.S. power sector should be 100-percent carbon-free. In the same timeframe, we need to cut our use of oil by half. By rising to meet those challenges, we will also be

slashing harmful pollution, saving thousands of lives, protecting irreplaceable wilderness resources, creating millions of jobs, and securing a prosperous future for generations to come.

That's not pie in the sky—we can already see these things happening as the clean energy revolution gathers momentum. Solar energy is the fastest-growing industry in the United States, currently creating jobs 20 times faster than the rest of the economy. The costs of utility-scale solar and wind energies are already within striking distance of coal and natural gas, and in many places, clean energy is already cheaper than dirty fuels.

That all helps to explain why we don't need to convince people that clean energy makes sense; they already get it. Solid majorities of Americans, regardless of party affiliation, support developing more sources of clean, renewable energy. However, for that clean energy transition to happen fast enough, we must shift the public from approving of it in principle, to demanding it in reality.

Before this starts to sound too easy, a quick reality check is in order: People may love clean energy, but the fossil fuel industry does not. It sees clean energy as an existential threat, and it will say and do anything to keep us hooked on dirty fuels. They spend hundreds of millions of dollars to persuade people that clean energy is an idea whose time has not yet come. They can't really pretend it's bad, so instead, they say it's too good to be true.

We know better. As we spread the message about the opportunities of 100-percent clean energy, the desire for renewable energy, which already exists, will become a huge, deafening, impossible-to-ignore groundswell of demand. And because we are building this movement from the grassroots up, our influence will be far greater than what even a Koch brother can buy. We will reach out and engage with every kind of American in every kind of community. And in the process of achieving 100-percent clean energy, we will not only save our climate, but also end the long-standing environmental injustices that fossil fuels have created in our nation.

Ready? Set? Organize!

CHAPTER 1: INTRODUCTION & OVERVIEW

Hello, it's nice to meet you! Thanks for your interest in learning more about how to take action on climate and other critical environmental issues. Whether you are a Sierra Club volunteer or staff, or anyone who shares Sierra Club's commitment to a safe, just, and sustainable planet for ourselves and future generations, welcome!

This manual was written by Sierra Club staff and volunteer leaders as a resource for the community of organizers, to share how we design and implement strategic, grassroots organizing campaigns that win, and how we develop leaders on the ground.

This manual is designed to aid your work as an organizer: building campaigns that enlist grassroots power to achieve outcomes that improve the world. Our objective is to lay out key ideas and practices that, in our experience, result in campaigns that succeed. This includes fundamentals of building relationships, analyzing power, and writing campaign plans. We also dig into some detail on topics such as how to enter a community, enlisting volunteers and cultivating their leadership skills, connecting your campaign to a larger movement, and how to learn from success and failure to improve your skills and campaigns.

This manual is not designed as a cookbook for tactics. We do not cover the steps of running a phone bank, conducting a petition drive, or pulling together a rally. Those skills are vital, and at the Sierra Club, we strive to maintain best practices for individual tactics. However, tactics must also be dynamic, variable, and responsive to the community's culture, your available resources, and the abilities and interests of your volunteers and leaders.

What we have aimed to produce is a manual that will help you establish a foundation of grassroots power for your work, upon which a range of tactics can be delivered well.

Conversations and relationships are the building blocks of community organizing, and we hope that this manual is just the beginning of our conversations with you. It is through give-and-take that we find common ground to join together and take action on a shared desire: to halt the rise of the earth's temperature, and ensure that we are developing new systems of sustainability for the planet that are equitable and just for all.

In our view, organizing is a craft and its techniques are honed by practitioners. We are indebted to scores of individual contributors to this manual and the hundreds of organizers we have learned from, both in the Sierra Club and from partner organizations. We welcome you to this esteemed group of learners and teachers.

WHY ARE YOU HERE? A MOMENT OF SELF-REFLECTION

Before you read further, please take a moment to reflect on why you are here:

1. What is your interest in reading this manual? How did you find it? What do you hope to learn? What do you hope to achieve through learning how to develop and execute effective grassroots campaigns?

2. Where are you on a spectrum of leadership? Are you a veteran grassroots leader, or new to campaign organizing? What do you hope to share with others based on your experiences? What do you hope to learn from others?

WHAT DOES ORGANIZING TO WIN LOOK LIKE?

The primary goal of this manual is to give you the foundational skills needed to be an effective grassroots organizer working on winning campaigns for the environment.

At its core, the fight to protect the planet consists of organized people confronting organized money. Grassroots organizing is about building the power of people to prevail over the power of money—by building relationships one at a time, engaging people from many backgrounds, developing leaders, and engaging increasing numbers of people who together win campaigns.

We believe that to be an effective grassroots organizer, you need an effective campaign plan that reflects a strong, values-based approach and is strategic in multiple ways.

VALUES-BASED CAMPAIGNS: Our campaign plans are grounded in a set of values or principles that reflect a commitment to equity and justice for all. These principles include:

- We are bold and solutions-oriented in our thinking.
- We work with others to design solutions that provide real and tangible benefits to people in communities in which we work, in a just and equitable manner.
- We design our work to engage people in a larger movement that shifts the power and politics in our country.
- We work to promote and protect democratic systems that give people the power to engage in decisions that affect their futures.
- We recognize and confront historical systems of privilege and oppression that continue to influence our own individual behaviors, as well as our systems

CESAR CHAVEZ – ON ORGANIZING

The book *Fighting Toxics* (1990) relates a frequently told story about legendary labor organizer and civil rights activist Cesar Chavez:

"(Chavez) was once asked by an aspiring young organizer, 'How do you organize?' He said, 'First, you talk to one person, face to face, then you talk to another...' 'But, Cesar,' the impatient youth interrupted, 'how do you really get them involved?' Chavez replied, 'First, you talk to one person, face to face, and then you talk to the next and then the next...!'"

of business, faith, education, and government.

- We design our outreach efforts and planning meetings to be inclusive and welcoming of others, whether they are new members to the Sierra Club or leaders we work with in the community.
- We consciously open up space for new leaders of color, youth, women, and those whose experiences come from outside the environmental movement.
- We work to win campaigns and create the conditions for a new generation of leaders to emerge through transformative engagement—to find, train, and coach leaders through campaign activities that will grow their knowledge, skills, and confidence to be powerful leaders with the courage, strength, and determination to lead others.

STRATEGIC CAMPAIGNS: Our campaigns incorporate goal setting, planning, and evaluating at all levels of the campaign. They facilitate people working together to achieve shared outcomes, while taking on separate roles and responsibilities.

Our campaigns:

1. Start with discussions about vision, strategy, theory of change, and the power needed to shift persuadable targets.
2. Include an analysis of how to build a base of supporters, and a network of allies and partners from communities in which we work, to generate the power needed to win.
3. Provide opportunities for leadership development and teamwork that build the foundation for long-term organizing capacity for communities.
4. Result in written plans, using shared language and templates, that connect the skills and resources available.
5. Are supported by powerful shared values and story-based messaging.
6. Use ongoing data analysis, learning, and course correction.
7. End with victories (or sometimes, with losses) that leave us stronger for the next campaign, and achieve outcomes that result in lasting change for people in the communities where we work.

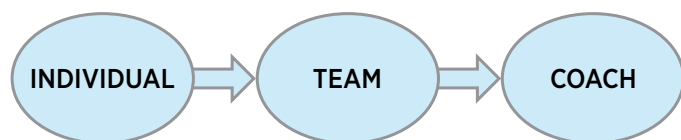
MANUAL OVERVIEW AND GOALS

OUR APPROACH

We are addressing “you” as we present this information, but organizing is all about working with others. With climate work in particular, we face a high level of urgency, a great deal of uncertainty, the need to identify and implement solutions in multiple areas that affect people’s

lives, and the question of how to best implement those solutions. Bringing an organizing perspective requires you to ask yourself not only, “What can I do to stop climate disruption?” but also, “Who can I bring with me to this work?” and “What am I able to teach and coach others to do, or what can I learn from others so we can all be more effective in winning our campaign?”

As we discuss and support your leadership skills throughout this manual, we will include tools and resources for you—as an individual, as a leader who is part of a team or group, and as a coach for others.



INDIVIDUAL LEADERSHIP: the skills needed to plan and implement a campaign with a group.

GROUP OR TEAM WORK: the skills needed to work together as a group to plan and structure an effective campaign.

COACHING AND FACILITATING: the skills needed to continuously pass the baton of learning from an experienced leader to a new or emerging leader.

In each chapter, we will provide you with assessment tools, discussion questions, planning sheets, case studies, and other materials to help you to learn on your own, as well as to learn with and coach others.

HOW TO USE THIS MANUAL

This manual has three distinct types of materials. First, there are instructional chapters that provide key principles, practices, and how-tos. Second, there are hands-on resources like checklists, worksheets, case studies, and more that serve as tools to put that instruction into practice. Third, we have interspersed chapters that provide background thinking and grounding, to explain the “why” of our organizing approach.

We believe that the manual can be useful if read cover-to-cover. However, we recognize that for many people, it’s more helpful to read selectively, moving back and forth between different chapters and among the three different types of materials. We’ve tried to structure it to serve either approach.

Although we will walk you through the work of campaign building step-by-step, remember that in real life, many of the processes will not be so linear. Planning is critical to get started, but it is an iterative process. Plans can—and should—change all the time: when new people with commitment and energy get involved, bringing new ideas and skills; when external or internal circumstances change; when efforts to influence decision-makers are

not bearing fruit; or when victories lead to additional opportunities to make progress.

We hope that this manual will help you thoughtfully design and effectively implement campaign plans. But we also know that great organizers make stuff up in the moment in response to circumstances—by brainstorming, by trying things out and making improvements on the fly, in moments of creative inspiration or instances of sheer terror, sometimes by mistake, often while under some stress, and usually by the seat of their pants.

It’s a combination of careful planning and evaluation, innovation as needed, and a willingness to take risks that will put you in the best position to win.

YOUR ENGAGEMENT

We started this introduction with some reflective questions, beginning with “What is your interest in reading this manual?”

Organizing is about connecting people—asking them about their interests, their motivations, their hopes, and their needs—so that you can find opportunities to work together. If you are currently a Sierra Club leader, volunteer, or supporter, you already have experience in working with this organization to fight climate disruption or in taking other action to protect the environment.

Sierra Club members across the country are strongly encouraged to follow the precepts of this manual in planning and running any grassroots organizing campaigns on climate or other environmental issues. These are the principles, skills, and methods that Sierra Club activists from around the country have used to run high profile, successful campaigns for the environment, and that we as a national organization use to ensure public policies that protect our planet—for our communities and for our future.

If you are not yet a Sierra Club member or supporter, we hope that this manual will help you better understand how we operate as we organize our campaigns. And if you find this information helpful, please share it! We hope we are putting our best thoughts and intentions forward as transparently as possible, to make it easier for everyone to work together—either by adopting shared ways of working or speaking, or through honest conversations about differences that can lead to shared understanding and better coordination of collective effort. Let’s get started!

CHAPTER 2: PRINCIPLES & PRACTICES OF AN EFFECTIVE CAMPAIGN

CHAPTER GOALS

- Identify the principles and practices of a successful organizing campaign.

PRINCIPLES OF ORGANIZING A GRASSROOTS CAMPAIGN

There are many ways to run grassroots organizing campaigns. Because the Sierra Club is a large organization, with staff and volunteers around the country working at the federal, state, and local levels, we need to

PRINCIPLE: A fundamental truth or proposition that serves as the foundation for a system of belief, or behavior for a chain of reasoning.

have a shared language, and a common understanding of the basic principles of planning and managing a campaign—principles that can be tailored to fit multiple contexts. We strive to embody a learning organization, seeking to add to our understanding of

organizing and learn from on-the-ground efforts while working with communities and partner organizations.

1. Campaigns should prioritize people and planning. Grassroots organizing campaigns are about organized people versus organized money.

At the foundation of all our campaign victories are people, coming together to identify how we will win (strategy) and plan the series of actions that will get us there. Our people are the most important part of any campaign.

2. Campaigns should be designed to win real-world change, contribute to both the larger environmental and progressive movements, and build organizational strength.

In the past, the Sierra Club has won victories through coordinated efforts with like-minded “green” partner organizations, aligned around similar or symbiotic goals. Today, our top priority is to make the U.S. 100-percent fossil-fuel-free by 2030. With such an ambitious goal, one that affects every corner of society, we have found we need to rethink how we are contributing to the larger environmental and progressive movements, and how to adopt more practices that ensure equity, justice, and a safe and sustainable planet for all.

CAMPAIGN: A series of planned actions that take the resources you currently have or can gain access to and turn them into the power you need to get the change you want.

We believe that movements are sustained groupings of organizations, affinity groups, leaders, and networks that share values, a common narrative, a deep and broad base, and a long-term commitment to change.¹ In this context, our base-building work around campaigns contributes to a larger movement in two ways:

1. We focus internally to build our own base of power by a) deploying staff and volunteers to recruit, train, and organize leaders locally, especially in areas that make the most strategic difference, and b) engaging our broader network of members and champions in taking action on- and offline;
2. We focus externally to build and use power in collaboration with other organizations and individuals to implement specific campaign strategies and/or broader movement goals.

“Today, our top priority is to make the U.S. 100-percent fossil-fuel-free by 2030.”

3. Campaign leadership comes from volunteer community-based leaders, with Sierra Club staff support.

As grassroots organizers, we seek not only to achieve specific outcomes, but also to do so in a way that strengthens democratic structures, and moves power from the hands of the few to the hands of the many. A natural outgrowth of this principle is that we put volunteer community leaders in positions of authority. This not only ensures that our campaigns stay rooted in community interests, but also is a practical measure that increases the skills and competency of the people we work with to be long-term agents of change in their communities.

The role of staff in the Sierra Club is to provide resources and expertise in service of our volunteer leaders. Our staff works within the strategic direction provided by volunteers to shape and implement campaign decisions. The grassroots organizer closes the loop, in effect, always drawing in new volunteers and cultivating their capacity to lead. We see our organizing staff as “organizers of people, not organizers of tactics.” To use a metaphor, our organizers don’t provide the fish; they teach others to fish for themselves.

4. Campaigns should be designed to shift power relationships, win real, immediate improvements in people’s lives, build new leaders, and sustain existing leadership within communities.

We want to shift power relationships so that communities’ voices are heard, rather than overruled by, for example, oil and gas companies and large contributors

¹ Manuel Pastor, Jennifer Ito, and Rachel Rosner, “Transactions, Transformations, Translations: Metrics That Matter for Building, Scaling, and Funding Social Movements,” (University of Southern California, October 2011), http://dornsife.usc.edu/assets/sites/242/docs/transactions_transformations_translations_web.pdf.

to political candidates.

Our campaigns deliver real, concrete improvements in people's lives. We know that to protect the climate, we must reduce carbon in the atmosphere. Our campaigns seek to do this, but to successfully engage communities, we focus on tangible outcomes that improve people's lives. For example, we examine the effects of coal plants on local air quality, and we plan campaigns to expand wind and solar power, with an eye towards reducing energy and tax bills for everyday consumers.

Campaigns build leaders that are capable and inspired to continue to be active well after an individual campaign victory has been declared. Sometimes those leaders continue to work within our organization; often, they move on to other endeavors. As contributors to a larger movement, we don't own our volunteer leaders; we celebrate their skills and work, however they choose to continue improving the world.

5. Campaign strategies are based on an analysis of the three faces of power: visible power, behind-the-scenes power, and invisible power (that which is sustained by social norms, systems of privilege, and culture).

Seeking to contribute to a larger movement, while also designing campaigns that successfully shift the balance of power, requires a deep analysis of how power is used and maintained. As an organization with a long history of representing a white, relatively wealthy constituency, it is a difficult but vital truth to recognize the power and privilege that history has conveyed. The model of the three faces of power, which we'll explore later on in this manual, is a key to understanding how power works in society. By extension, it is also a key to understanding how the Sierra Club has benefited from its power and privilege.

For example, while the Sierra Club often has the capacity to work with a decision-maker behind the scenes to broker a solution, we need to think about whether that approach would further a system of privilege and exclusion. While a staff lobbyist may be seen initially as having more credibility with legislators than a community leader, we should still work to put the community leader forward first at a hearing, as part of a larger fight against invisible power dynamics and prejudices.

6. Campaign staff and volunteers have clear roles and responsibilities that best utilize their skills, experience, and expertise.

An effective campaign engages many people: some staff and many volunteers, some with many years of experience and others who are first-timers, people with very specific personal skills and interests, and others who "just want to lend a hand." Respecting what an individual brings to the campaign both makes the campaign stronger and more deeply invests the individual.

So, we shape roles and responsibilities that match an individual's skills and interests. And when the volunteer with seriously awesome data entry skills suggest that they want to get better at public speaking, we strive to provide that opportunity.

Two additional considerations: First, when a volunteer says they are "willing to do whatever is needed," dig deeper with that person. A vague role or fluid responsibilities often lead to a short tenure as a volunteer. Second, recognize your own limits of imagination. View each new volunteer as a learning opportunity: What new things can you learn from them, and what new dimensions do they bring to the campaign? We'll discuss this further under the general heading of one-on-one meetings.

7. Campaigns build constituency through public education and services, engaging people through their own direct experiences and knowledge of what is at stake.

The Sierra Club provides community programs designed to bring people—children, families, young people, veterans, and others—into the outdoors, through hiking, bicycling, kayaking, backpacking, and other activities. Many of our chapters and groups also provide general public presentations and lectures on a variety of topics. Through these efforts, we seek to educate the public about the value of the outdoors and build a broader constituency of support for environmental protection policies.

But we don't stop there. As people engage in these public education opportunities, we present them with a chance to engage directly with the issues, to learn more, and to take action. For example, we might offer community members the chance to tour a local agricultural center to learn more about creating vegetable gardens for food-insecure families and neighborhoods. That tour might end with a call to action to write their local legislator about a relevant piece of legislation, or an invitation to join a phone bank to ask others to take action on the issue.

8. Campaigns prioritize inclusion, democratic participation, and the development of leadership commitment and capacity over time.

In creating this organizing manual, we are in the debt of many teachers and practitioners for their contributions to how we do our work. We especially would like to call out the teachings of the [Midwest Academy](#) in Chicago and [Marshall Ganz](#) at Harvard's Kennedy School.

There are many theories about “how to organize,” and each organization and leader in the progressive movement may have their own point of view about getting the work done. What ties the various theories together is that they all fall along a spectrum of inclusion (who is at the table), democratic participation (how decisions are made), and implementation (who is responsible for carrying on the work). The Sierra Club is continually working to strengthen our inclusive practices, provide transparent decision-making processes, and engage others in leadership development activities.

9. Campaign strategies and tactics should build on what has already been learned.

As a learning organization, we approach our work by engaging outside expertise, developing pilot projects, and testing theories on the ground. Starting from a blank page is hard, and usually unnecessary. The best big campaigns often start with a small campaign, learning through trial-and-error and then replicating the best practices generated by that learning to pilot a few more versions. The same holds true for tactics: If one leader learns how to organize and manage a bus of volunteers attending a hearing, that learning can be shared with others and applied to organizing three buses next time.

PRACTICES OF AN EFFECTIVE CAMPAIGN

We briefly note key elements of an effective campaign here. Each of these topics is more fully explored in later chapters.

START WITH A WRITTEN CAMPAIGN PLAN.

Develop a campaign plan using a template that identifies the vision, solutions, outcomes, and effects, as well as the strategic thinking to achieve those outcomes by shifting power relationships through increased demand, and the plan to implement those strategies over time.

RECRUIT TEAM MEMBERS AND PRIORITIZE

PRACTICE: the actual application or use of an idea, belief, or method, as opposed to theories about such application or use.

DEVELOPING PROCESSES TO WORK WELL TOGETHER.

1. Identify the core functions of your campaign.

Issue campaigns rely on a general suite of skills and expertise that often are divided into specific roles

and responsibilities:

- Campaign Team Leadership and Management
- Policy and Lobbying
- Legal
- Traditional Media and Communications
- Social Media and Online Organizing

THE SIERRA CLUB TACTICS CRITERIA CHECKLIST

Before committing to any particular activity, always ask yourself the following 10 questions:

1. Which specific goal do we hope to achieve through this activity?
2. Who is our target for this tactic, among the identified decision-makers, audience, and/or media outlets?
3. How will this tactic communicate our campaign’s message?
4. Will this activity alienate any of our strategic targets or hurt our organization’s overall credibility?
5. Do we have the time, money, and people necessary to execute this tactic, and is it worth the investment of these limited resources?
6. If we plan to secure press attention with this tactic, is it really “newsworthy”?
7. How will our coalition partners be contributing to this effort (in terms of developing strategy, people, connections, and money)?
8. Will this be fun? Will it sufficiently engage and inspire our base of supporters?
9. Is this tactic simple, achievable, and effective?
10. How will this activity set us up for our next one, in terms of strengthening our organization, creating demand and/or accountability, and building momentum?

If you can’t satisfactorily answer all 10 of these questions for a given activity, don’t do it. It is very easy to get carried away with an appealing idea without fully weighing its strategic value. This can end up being wasteful, and can sometimes backfire and cost the campaign much-needed credibility and support.

Be creative and have fun with your tactics, but also keep your strategy, message, and targets firmly in mind.

- Field Organizing and Outreach
- Budget and Operations

Each campaign team should identify the critical needs of the campaign during initial strategic planning: e.g., to launch and build the base for a campaign, to build campaign visibility, and to engage with decision-makers to make demands and negoti-

ate agreements.

2. **Define roles and responsibilities.** The people who are engaged in the ongoing work of the campaign should have well-defined, time-limited roles and responsibilities. Ensure that staff roles and volunteer leadership roles are clear and mutually supportive.
3. **Develop tactics and a timeline that strategically use resources, increase leadership capacity, and build pressure on targets.** Tactics should start small and prioritize proactive activities designed to engage a community and develop a network of leaders, activists, and supporters.
4. **Commit to working together as a team.** Identify the person or people who will lead your campaign team to ensure that you are all working well together. This includes organizing and facilitating planning meetings, check-in calls, and individual check-ins as needed, and managing and coordinating the communication processes. Also, identify how team members will provide leadership to help the team work well together.
5. **Develop integrated work plans.** Work plans are written documents detailing what needs to be done to move your target, and who is going to do it. They are the intersection between a strategic plan, and the well-defined roles and responsibilities based on well-defined outcomes that will move your target. Work plans can be written and shared weekly, bi-weekly, or monthly. Work plans should inform the work of individuals and be shared with team leaders, managers, and teams in a regular, ongoing way.
6. **Design Monitoring, Evaluation & Learning (MEL) processes for the campaign.** Through monitoring, evaluating, and learning, you will be able to break down how much power you have to build to make concrete changes happen. This process allows for transparency, accountability, and ultimately, learning about how we can be most effective and efficient.

JEMEZ PRINCIPLES

These six principles were developed in December 1996, at a meeting convened by the Southwest Network for Economic and Environmental Justice, with the intention of hammering out common understandings between participants from different cultures, politics and organizations:

- Be Inclusive
- Emphasis on Bottom-Up Organizing
- Let People Speak for Themselves
- Work Together in Solidarity & Mutuality
- Build Just Relationships among Ourselves
- Commitment to Self-Transformation

By engaging in ongoing Monitoring, Evaluating, and Learning (MEL), we can take advantage of everything we learn, and thus build an even larger movement. You will find much more detailed information about MEL processes (and how to apply them) in Chapter 11.

7. **Apply values-based strategic planning: Justice and Equity.** Each campaign should identify and post its core values related to justice and equity, and test decisions to ensure that they are aligned with the values of the campaign. The Sierra Club is committed to aligning our campaigns with the Jemez Principles and recommends adopting these principles for decision-making sessions, both internally and with external partner groups.

As we increasingly work to shift power relationships and engage with new partners, it is more critical than ever that we have a set of shared standards for how we work with others, both internally and externally.

BUILDING A CLIMATE DISRUPTION MOVEMENT

By Natalie Foster, Byron Ramos Gudiel, and Sarah Hodgdon

There's a movement brewing to fully confront climate disruption and create a 100-percent clean energy future, and it's different from what we've seen at the Sierra Club before. It has more in common with historic efforts like civil rights, immigrant rights, and gender equality. There is no singular solution—no one law to be passed,

“For a campaign, victory is about incremental progress. For a movement, victory is a transformation: a time when everything changes and no one can imagine going back.”

no court case to be won, treaty to be signed, or corporation to confront. Rather, it requires concerted action at every level, with lawsuits, lobbying efforts, accountability campaigns, and community initiatives that are all tied together in purpose and vision. Also, the problem of climate disruption has mate-

rial effects on every living person, with disproportionate negative effects falling on low-income communities and communities of color—and if history is a guide, the traditional environmental organizations are likely to propose “solutions” that would impose disproportionate costs and burdens on those same communities.

If we think about climate disruption as a “movement” rather than a “campaign,” three important themes are evident:

1. Like other large, historic issues, climate disruption strikes at fundamental questions of justice, and targets some deeply embedded assumptions of culture and society. This is true both for the effects of climate disruption, and for the effects of a dramatic shift to a 100-percent clean energy infrastructure. To shift the balance on these issues is to shift the moral compass of entire populations. For a campaign, victory is about incremental progress. For a movement, victory is a transformation: a time when everything changes and no one can imagine going back.
2. Social movements are deeply connected to the well-being and equity afforded to groups of people who are typically marginalized in a society. Movements are necessarily led by the people most harmed by the status quo.
3. Dr. Manuel Pastor, a noted sociologist, distinguished movements in an additional way: “Movements are something special; they go beyond an organization to become sustained groupings with shared values,

a common narrative, a broad and deep base, and a long-term commitment to change.”²

HISTORICAL CONTEXT: LOOKING BACK BEFORE WE LOOK FORWARD

As an organization with more than 120 years of history, the Sierra Club brings baggage to its contribution in the movement for climate solutions. Our track record of campaign victories demonstrates power and efficacy, but our singular-campaign focus and tightly honed objectives have often been seen to serve the interests of a narrow constituency. Owning that fact does not diminish the history of past successes, but should open our eyes to how we do our work today—differently, within the context of a movement.

This isn't a new critique. In 1970, the Sierra Club and other “mainstream” environmental organizations largely stood on the sidelines of the first Earth Day, while hundreds of thousands of people gathered in rallies and teach-ins across the United States to discuss dirty air, fouled waterways, and other toxic threats to human health. For an organization whose campaigns were focused on wilderness preservation and park management, this outpouring of popular concern was a revelation.

Flash-forward 20 years to 1990: The nation's largest environmental groups, known at that time as the “Group of Ten,” received a letter from the SouthWest Organizing Project (SWOP), a broad network of leaders and activists, challenging them to recognize the broader human impact of mainstream environmental priorities, decision-making, and campaigns:

“Although environmental organizations calling themselves the ‘Group of Ten’ often claim to represent our interests, in observing your activities it has become clear to us that your organizations play an equal role in the disruption of our communities. There is a clear lack of accountability by the Group of Ten environmental organizations towards Third World communities in the Southwest, in the United States as a whole, and internationally.

“Your organizations continue to support and promote policies which emphasize the clean-up and preservation of the environment on the backs of working people in general and people of color in particular. In the name of eliminating

² Manuel Pastor, Jennifer Ito, and Rachel Rosner, “Transactions, Transformations, Translations: Metrics That Matter for Building, Scaling, and Funding Social Movements,” (University of Southern California, October 2011), http://dornsife.usc.edu/assets/sites/242/docs/transactions_transformations_translations_web.pdf.

environmental hazards at any cost, across the country industrial and other economic activities which employ us are being shut down, curtailed or prevented while our survival needs and cultures are ignored. We suffer from the end results of these actions, but are never full participants in the decision-making which leads to them.”³

A year later, at the first National People of Color Environmental Leadership Summit, the SWOP letter was followed by the publication of the “Principles of Environmental Justice,” articulating a 17-point road map to a broader, more inclusive movement for environmental justice.⁴

Mainstream environmental groups have treated these critiques modestly, and largely have been spectators to the environmental justice work that began to take shape in the early 1990s—sometimes collaborating, sometimes hindering, and often standing on the sidelines. The division has most visibly manifested as one of race and class, with the membership and staff of mainstream environmental groups constituted largely by, and representing the interests of, wealthy whites, while environmental justice organizations largely represent the interests of working-class people of color.

That division has been fully called out. A 2014 report, authored by Dr. Dorceta Taylor for a collaborative of green groups and foundations, revealed that while people of color made up 36 percent of the U.S. population, they constituted only 12.4 percent of staff in 191 surveyed environmental organizations. That disparity increased dramatically among board members (4.6 percent).⁵

Each of these points in time represents acute awareness of some basic truths: While mainstream environmental groups have accomplished much good, they have historically represented, and continue to represent, a narrow slice of the public. The narrow-constituency focus of these groups has resulted in negative effects on vulnerable communities. And only by contributing to a larger, more inclusive vision for the world’s energy future will we be able to build solutions that are sufficiently bold and equitable to win the support of a powerful movement.

THE CLIMATE MOVEMENT IS ALREADY LARGER THAN BIG GREEN

If we think about the nature of a movement as a groundswell of empowered people, rather than a product of

one organization’s or coalition’s campaign, then the necessarily modest role of mainstream environmental groups becomes apparent. Looking at some of the most visible and successful climate disruption initiatives in recent years, the true breadth of the movement becomes clearer:

- **Fossil Fuel Divestment:** A largely student-driven effort that draws richly from the social justice spirit and tactics of the 1980s South African divestment movement.
- **People’s Climate March:** The largest outpouring of citizen frustration at the lack of progress on climate disruption policy was dominated not by mainstream environmental groups, but by “frontline communities” (under the banner “It Takes Roots to Weather a Storm”), illustrating the power of community-led solutions for a just transition.
- **Beyond Coal:** While initiated by the Sierra Club, this campaign is driven by an organizing model that emphasizes building connections and investments with community partners and constituencies most affected by coal-fired power plants. As a result, talking points and local strategies make little reference to climate disruption, emphasizing local priorities such as health and economic effects instead.
- **Hurricane Sandy volunteer response:** As government response faltered, the gap was visibly filled by activists of the Occupy Wall Street movement, who were effective at drawing attention to both the climate disruption implications of the storm and the minimal response in economically distressed communities.
- **Tar sands and oil pipelines:** While mainstream environmental groups had voiced opposition to Canadian tar sands developments and associated pipelines to deliver the crude to the U.S. and beyond, it was the spark of Idle No More in 2012 that brought the issue to international attention. A grassroots effort ignited by three indigenous women and a white ally, they drew together the intersections of an environmental catastrophe and a historical, systematic destruction of indigenous cultures.

Climate disruption solutions tug on a web of tensions in our society, where interests are varied and a solution for one group of people can be seen as damaging to others. Where one climate activist may see fossil fuel infrastructure primarily as a climate problem, and renewable energy projects primarily as a climate solution, there are many legitimate viewpoints to consider. For example, the child whose asthma attacks are more frequent and severe when the neighboring coal plant is billowing pollution; the indigenous community whose lands are being invaded for fossil fuel exploitation; the university whose

³ Richard Moore, et al, letter from The SouthWest Organizing Project (March 16, 1990), <http://www.ejnet.org/ej/swop.pdf>.

⁴ Delegates to the first National People of Color Environmental Leadership Summit, held October 24 – 27, 1991 in Washington, D.C., drafted and adopted these Principles of Environmental Justice: <http://www.ejnet.org/ej/principles.pdf>.

⁵ Dorceta Taylor, “The State of Diversity in Environmental Organizations,” (Green 2.0, 2014), <http://www.diversegreen.org/the-challenge/>.

finances are tied to the profits of refineries; the union members who see their jobs threatened by new carbon regulations; and the wildlife advocate whose cherished desert landscape is sited for solar development.

This complicated set of tensions can serve as ripe ground where a true movement can grow: an issue of compelling concern to a broad swath of people from a great diversity of backgrounds, brought together by a common interest in provoking change. The question then becomes: What role do we, as organizers and leaders, play in cultivating the growth and development of this movement? None of us, acting alone or in segmented groups, have the power to get what we want. So, what is our responsibility as people of goodwill seeking to contribute to a larger whole—the climate movement? How do we collaboratively build solutions that serve these broad and sometimes divergent perspectives?

One important consideration is power and privilege. Organizations that historically have represented a white, relatively wealthy constituency, including the Sierra Club, need to be aware of their inherent power and privilege when entering into conversations and partnerships with communities of color and low-income communities. Even well-intentioned offers to canvass a neighborhood, table at an event, or pay for a promotional piece can undermine a partner organization by overriding their community's voice.

An organizer working for a privileged group has a responsibility to understand how the organization's power and privilege provide it outsized access and influence among decision-makers, often with the effect of diminishing the role(s) of partners. Coaching the privileged organization's leaders, staff, and volunteers on these topics can help them avoid alienating critical allies, and support them in using their privilege to amplify the voices of those who have been shut out of decision-making in the past.

A successful collaboration that builds a broader and more effective movement is one in which those with more power use their resources to intentionally raise the voices, influence, and profile of their less privileged partners, particularly where those partners have more to gain or to lose in the outcome of the campaign. Think, for example, of the neighborhood group representing the residents living downwind of a coal-fired power plant, which the larger and more privileged organization wants to shut down due to climate disruption. Or the environmental justice organization whose constituents are least able to afford a modestly subsidized, residential solar panel program that the privileged organization would like to see put into place.

ELEMENTS OF MOVEMENT BUILDING

Recognizing that a movement is larger than any organization or individual, we nevertheless believe that organizers and organizations can contribute to building a movement as they pursue more focused campaign work:

1. **Vision and Urgency:** communicating a common vision that moves people from fear to hope, and indicates how they can contribute to tangible solutions.
2. **Local Victories:** executing campaigns and winning local victories that provide people with a sense of their own power and of their contribution to larger outcomes.
3. **Movement Moments:** seeking out intersections with events or circumstances in the broader world, and tapping into the energy and enthusiasm of mass mobilizations.
4. **Leadership:** cultivating leaders who are capable of and willing to take action when the organization asks and, critically, able to identify issues in their community and self-organize within their networks.
5. **Relationships:** building relationships with partners who share some core values in order to strengthen our power as we work toward common goals.

These principles are valuable both in movement building and in a focused campaign. It's the way we approach each principle that determines whether the specific work rolls up to contribute to something larger. We offer the following broad guidelines to effective organizing that will also cultivate and contribute to a larger movement.

LISTEN, AND SEEK CONNECTION

As organizers, we work in service to our communities. A campaign-focused organizer identifies a core of like-minded individuals with a focused goal, and works with them to make it real. A movement-oriented organizer builds more slowly, looking first to understand the broader dynamics of the community. What are the issues that dominate the local news and kitchen table conversations? Which organizations represent the broadest base of local interests? Who are the leaders that people in the community look to for inspiration?

The weeks spent sussing out the deeper currents of the community develop a broader picture. One-on-one meetings spent listening to community leaders talk about the issues important to them reveal the motivations and purpose behind public statements and positioning. An authentic search for connection and shared

objectives requires the organizer to keep an open mind and heart, and the patience to establish trust.

When all of this is done well, the campaign meeting will have the allies sitting at the table, helping to create the plan. Rather than establishing goals and strategies, and then asking prospective allies to come along, the allies are equal partners in creating those goals and strategies.

PUT PEOPLE FIRST

As organizers, we value the thousands of people who take single actions: sending an email to a legislator, posting a favorable op-ed on their feed, or showing up for a critical rally or hearing. But we spend the majority of our time and energy looking for diamonds in the rough, the people who are asking questions about “what’s next.” Spending the time to cultivate their interest—through a one-on-one meeting at a coffee shop, a 2-hour training opportunity to learn more about the issue, or a downtime social event where emergent leaders get to know the people they’ve been working with—helps us understand who can step up and carry more of the load.

As we cultivate these individuals and their interests, some step further forward and assume leadership roles where they start to absorb the work as part of their identity. They move from participants who respond to a call to action to agents of change—gaining the skills to build campaigns and cultivate networks of activists themselves.

As our campaigns wax and wane, emerging leaders come and go. Sometimes they take a more visible role with a partner organization, and sometimes they “take a break” for a year or two. That can feel like a loss as we focus on delivering the local victory in our sights. But cultivating these agents of change is an essential contribution we make to the larger movement, and the greater our investment in their skills and knowledge, the more likely that when our need is great, they’ll be there to lend a critical hand.

MOVEMENT STORIES

A movement strives for transformative change, where people and institutions cross a threshold and cannot step back. The steps toward that change are made up in part by discrete campaign victories that are understood to be part of a larger narrative. The Supreme Court decision effectively legalizing gay marriage in June 2015, for example, was a transformative moment reached by the gradual accumulation of legislative, judicial, and referendum victories across the country. Without that local work, the Supreme Court decision could not have taken place.

Each municipal initiative to fund low-income housing energy-efficiency retrofits, each state transportation policy decision that reduces car dependency, each utilities commission decision to favor solar power over fossil fuels—these can all roll up to movement momentum, if the people who participate can see their connection to the larger effort.

You, the organizer, play a critical role here. You take the time to draw the connection between the local campaign and larger change initiative. You foster connections with similar community initiatives from other cities, states, or nations. You seek ways to amplify the local effort by connecting it to a broader movement.

In the past, it could be difficult to draw those connections. But organizers today have ready access to social networking tools that easily connect campaigns to larger movement memes and themes. The costs and challenges of connecting with like-minded people have plummeted. Examples of other movements are much more readily identifiable. Social media and online platforms like AddUp.org help the movement “see itself”—the presence and power of local initiatives from across the globe can be felt without physical proximity.

MOVEMENT MOMENTS

As an organizer who is focused on delivering a clear set of escalating tactics to win on a local issue, an emergent crisis, a breaking news event, or an “all-hands-on-deck” call to action that sucks up the energy and attention of your volunteers can seem like an unwanted distraction. These sorts of emergent events can feel like isolated “one-offs” that don’t feed into the focal effort of the campaign, or “tactics in search of a strategy” that don’t build long-term power, but instead fritter away activist energy.

An emergent training collective called [Movement Mastery](http://MovementMastery.org) provides an analysis that neither tightly disciplined campaigns nor decentralized, distributed initiatives are likely to succeed alone. Rather, they propose that the two operate in synchrony. One way to think about that balance is to think about the audience for each approach. A focused campaign typically thinks of the decision-maker as its audience—the person or people to whom the campaign’s tactics are addressed. A mass movement—the Occupy Movement, for example—addresses its tactics to the larger community, inviting more people in to feed the size and scale of the movement itself.

Balancing the two approaches involves thinking about the effect of tactical choices on both the decision-makers and the movement’s constituent participants. If, as

an organizer, your volunteer leadership team is talking about the energy and enthusiasm they felt at the latest Black Lives Matter rally, it may be better to lean in to that discussion and look for points of intersection, rather than insist that the team focus on its next tactic.

WHAT WILL OUR MOVEMENT LOOK LIKE?

The People's Climate March had many themes, reflecting the diversity of participating individuals and organizations, but if there was a single tagline that best reflected the spirit of the day, it was: "To Change Everything, We Need Everyone."

That motto could serve for all of the great social justice

movements. Eventually, successful movements enlist "everyone" as the moral basis of society shifts, and in doing so, find ways to serve everyone. As organizers, we take responsibility for enlisting and empowering a broad swath of community members, and cultivating them as community leaders who go on to enlist and empower yet more people—ever focusing outward, and ever striving to build connections and enlarge the movement.

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CHAPTER 3:

PLANNING YOUR CAMPAIGN

CHAPTER GOALS

- Describe the campaign planning process and its iterative nature.
- Define and describe “Theory of Change.”
- Identify elements of an effective, written campaign plan.

This chapter will lay out the basics of planning an effective campaign—one that is driven by strategy, delivers on the intended goals, shifts power relationships with decision-makers, and leads to outcomes that affect people's lives in real and immediate ways. Written campaign plans provide guidance to teams, staff, and volunteer leaders about the tactics and timeline, and clearly denote both individual and team responsibilities. Our campaign plans are what keep us on our path to victory. Without a written campaign plan, it can be easy to get distracted or veer off course.

The written campaign plan is an essential step in the planning process, but typically not the first step. We'll

THEORY OF CHANGE:

An organization's articulation of the results it must achieve to be successful and how it will achieve them. Your campaign's theory of change needs to be explicit in two areas—Outcomes and Power—to be clear about *what* you will win and *how* you will win it.

briefly describe four stages of planning below, and then dive more deeply into the structure of a written plan. We'll go into more depth with the other stages of the process in later chapters.

WHAT IS CAMPAIGN PLANNING?

Campaign planning is a process that:

- Is iterative, with key stakeholders (key volunteers, relevant

staff, and partners) engaged at all stages of drafting, research, and later, evaluation and modification, to provide input and feedback.

- Results in a written campaign plan that provides the core, operational theory of change that guides all work of the campaign.
- Provides clear goals, timelines, benchmarks, indicators of success, and ways to measure success.
- Clearly identifies who will do what, based on their campaign roles.
- Builds and develops leaders in our campaigns.

FOUR STAGES OF PLANNING

The four stages listed below span the duration of the campaign. This is because circumstances are always changing, and a static, unchanging plan can become meaningless very quickly. What if an election means your target is suddenly someone new? What if a legal decision throws the issue into a different decision-making venue? What if a new, well-funded opponent comes out of the woodwork? Or what if a tactic turns out to be surprisingly effective? None of these necessarily mean starting from scratch, but significant changes in the landscape warrant reconvening your leadership team and making adjustments.

1. Campaign Launch

Campaigns often launch at an initial meeting where the need for a campaign is established, a big picture goal is identified, and the Theory of Change is sketched out.

- Convene group to:
 - Identify and assess your goal (Will it bring about real and immediate change in people's lives? Will it build enduring power? Is it urgent?)
 - Analyze your team's strengths and weaknesses
 - Identify and map your target (see Chapter 6 for more on power mapping)
 - Map the communities you will be working in (more on community mapping in Chapter 5)
- Note that these steps require work in advance of the initial meeting. We'll explore those steps later in the manual, but for now, we want to lay out how they fit into the larger planning process.

2. Writing the Campaign Plan

Create a plan to move decision-makers to achieve your goal. The plan includes a timeline with clear benchmarks, indicators of success, and resource allocation. The work of crafting the campaign plan is usually done by meeting as a group, in person.

A written campaign plan should:

- Build on earlier analysis, both what participants bring to the room and the work done at and around the campaign launch.
- Identify a pathway to winning that delivers tangible policy outcomes, results in an enduring shift in power, and leads to increased leadership and grassroots capacity.
- Identify the campaign message and key messengers.
- Identify a suite of tactics, set on a timeline, designed to build and deliver power to move the decision-maker to "yes."

3. Work Plans

The written campaign plan provides the context for establishing deliverables for leaders and/or staff, based on their respective roles.

- Divide the work: Identify and assign individual roles, tasks, teams, and projects.
- Identify key deliverables.
- Identify the decision-maker and the accountable, responsible, consulted individuals for key deliverables.

4. Tracking Success and Updating Plans

Regularly review your progress related to the campaign goals. Make changes to the plan based on learning—what worked or didn't work—or a shift in circumstances.

- Schedule after major benchmark events.
- Schedule on calendar per quarter or half-year.
- Schedule as needed to get on track.
- Schedule regular meetings and coaching check-ins.

PUTTING THE CAMPAIGN PLAN ON PAPER

Why do we need to write down the campaign plan? The main reason we write down the campaign plan is that it's the best means to ensure that everyone involved has a common understanding. As the campaign progresses, individuals and teams will get deeply involved in their piece of the work. A written plan allows for a point of reference to the larger picture. Does a new, appealing tactic fit into the strategy? Is this person a viable secondary target? Are we building the right team structure? Does this social media post reflect our core messaging? These are the types of questions that can be answered when we have a written campaign plan.

The Sierra Club Planning Matrix outlined in the sidebar follows the Sierra Club's standard campaign plan format. We've provided an accompanying worksheet in the Appendix with descriptions of each part of this planning matrix, and you'll find several parts detailed in other chapters. We have found this structure to be useful, but other organizations or teams may prefer to modify it.

SIERRA CLUB CAMPAIGN PLANNING MATRIX

A. Vision – What are the long-term aspirations of the organization or campaign?

B. Values – What are the beliefs and ideals that will guide the work of the campaign?

C. Theory of Change – Why and how will we win?

D. National Campaign/Conservation Goals

1. Goal for Environment
2. Specific Campaign Outcome
3. Interim Milestones

E. Power Building/Organizational Goals

1. Team Leaders
2. Teams
3. Participant Activists
4. Diversity, Equity & Inclusion
5. Strategic Partners

F. Target Selection & Power Mapping

1. Primary Decision-Maker Targets
2. Power Mapping
3. Community Mapping
4. Secondary Targets

G. Messaging

1. Campaign Media Story, Key Talking Points, and Slogan
2. Organizing Narrative

H. Identify Tactics to Build Power and Scale

1. Tactics
2. Six-Month, Detailed Work Plan
3. Budget

Whether you use this outline in full or choose to modify it, we believe the following are core elements and thinking that will be helpful to you in creating an effective plan:

Campaign Goals

Campaign goals are visionary statements about the world we seek to create. They inspire us and set the tone for a campaign, but they can also feel intangible and abstract. So, we use our goal to establish the real, concrete change in the world that we seek, which we call the “outcome.”

EXAMPLE:

Goal: To reduce carbon emissions from vehicles by creating attractive, accessible bike paths throughout our community.

Outcome: To construct 15 miles of new bike paths by 2018, with two-thirds of the paths located in neighborhoods underserved by alternative transit infrastructure.

It's important that our outcome is framed as the concrete change we seek in the world. We may spend much of our time in the campaign focused on passing a local budget measure that provides funding for bike trails, but that is not the outcome we seek; it's a means toward the outcome. By articulating the concrete change we seek, we keep our focus on that which makes a difference to the community. A few people care about budget measures; many more people care about new bike trails.

Achieving a visionary goal may take years. Campaigns need to estimate and project how progress will be made, step-by-step, to reach short- and medium-term milestones.

Choosing which milestone to focus on first, then next, is what strategy is all about: It is the route we plan to take to the goals we've committed to reach.

Target Decisions and Decision-Makers

Positive outcomes for the environment don't just happen; they are a result of specific decisions made by specific people. Decisions to deny or approve permits, adopt or reject environmental standards, build or retrofit facilities, pass or defeat legislation, or increase or decrease funding are made by agency staff, elected officials, resource managers, corporate executives, facilities owners, homeowners, and many others. What is important to the development of campaign organizing strategy is to recognize that these are real people. Strategically targeting a specific campaign outcome means identifying those whose decisions we must influence.

Many decisions that affect the environment are made in

private settings by millions of homeowners, developers, corporate executives, and others. Some of the Sierra Club's organizing efforts focus directly on these private decision-makers.

Often, the Sierra Club chooses to focus its campaigns on achieving results via public policy decisions, because public policy influences the subsequent decisions of many others. Public policy decisions also have processes and deadlines that Sierra Club leaders and activists can engage in, and that can involve others in the community as well.

Defining Targets

To define your target, you need to be clear about three things:

- 1. What is the decision-making venue or process you will work to influence?** Is the decision part of a state agency process or at the city or county level? Will the decision be made in a state legislature or at a federal level? Is it a decision that will be made by a college board of regents, or a corporate CEO?
- 2. What is the timeframe of the decision?** Is there a date-certain for the decision? Can you predict a likely timeframe? Or is there no decision point yet, and you are working to force one?
- 3. Which decision-maker(s) have the power to deliver or deny a victory?** This question must always be answered with the names of individuals, not institutions. In other words, “the legislature” or “the city council” is not going to determine the fate of your effort, but certain members of those governmental bodies will. If your goal is to secure an executive decision from one or two individuals e.g., the governor, the CEO of a corporation, the secretary of transportation, etc., then those people are your targets. If, however, you need to secure a majority vote in favor or against a particular policy from a group of individuals e.g., the legislature, the board of directors, the planning commission, etc., then you will need to select a subgroup among this governing body to target.

Targets Are Not Opponents

In the heat of a campaign, particularly at a point where our target is pushing back against our efforts, it can be tempting to think of the person as an opponent. Avoid the temptation! The outcome of your campaign is dependent on getting the target to “yes,” and if your campaign is set in opposition to the target, you're making that “yes” much more difficult to achieve.

ORGANIZING TACTICS TIED TO TARGETS

WHOM WILL WE ORGANIZE? WHO WILL MOST INFLUENCE OUR TARGETS?

When our targets are public officials, those who elect or appoint those public officials are in a strong position to influence them. Public officials are also strongly influenced by other public officials: mayors can influence governors, governors can influence senators, and so on. All public officials are also people, with personal friendships, loyalties, interests, and points of view that influence whom they pay attention to most. A “power map” (see Chapter 6) is the best way to systematically explore and identify whom we need to organize to influence our targets.

WHAT TACTICS WILL WE USE TO ORGANIZE PEOPLE?

Organizing means creating “organization” that can be sustained for as long as it takes to win the next milestone, and then the next, and the next. The ways in which we organize people—the kinds of leadership, teams, networks, coalitions, and partnerships we put together—are key strategic choices for organizers. Well-organized people have the power to attract more people, pass on skills and knowledge, plan and take action together, manage their time, and pool their resources in ways that individuals acting on their own cannot.

Which tactics we use to organize people, what training and coaching we provide them, how we support and motivate their work as they are getting started, what we ask them to do online, and what we ask them to do together with others are all key challenges for organizers.

BUILDING ORGANIZATIONAL STRENGTH AND BUILDING MOVEMENT STRENGTH

Campaign organizing is a part of the Sierra Club’s overall organization and organizational structure. As we aim to contribute to a larger movement, building the strength of our organization is one critical piece of that contribution.

We also succeed when we build the strength of our allies, both because they are partners in this specific campaign, and because we build our long-term alliance by demonstrating our commitment to their strength. This dynamic is particularly important as we seek to build authentic relationships with traditionally disempowered groups. It may be satisfying for the Sierra Club

volunteer to speak at the press conference; but when we recognize that the role is more appropriately held by the spokesperson for the affected neighborhood group, we are taking a bigger step toward building a powerful movement.

WHAT TACTICS WILL WE ASK PEOPLE TO ENGAGE IN TO INFLUENCE OUR TARGETS?

If you’re not sure how a tactic ties to your target, you need to rethink it. The result of all organizing should be that there are more people who can influence our target, taking actions that influence our target. Tying tactics to targets requires good planning, continual evaluation of “how it’s going,” and modifying plans based on what we learn.

HOW WILL WE ASSESS HOW WELL OUR TACTICS ARE WORKING?

The only way to know you’re making progress is to establish in your plan what result you expect to achieve, and then assess whether you were able to achieve it. Did the action you asked of people influence your targeted decision-maker to take the action you wanted? Were you able to mobilize and organize the number of people you thought were needed to influence the decision-maker?

WRITE YOUR CAMPAIGN PLAN
When you’re ready to dig in and write your campaign plan, go to **Appendix I** to see the Sierra Club’s Campaign Planning Matrix.

Planning a grassroots organizing strategy is like a scientist’s hypothesis. A campaign-organizing plan is your hypothesis about what it will take to achieve the results you need to win. As we actually engage others in action according to our organizing plan, we test our hypothesis. With each action, we either gain a key result or learn more about what it will take to do so. As organizers, the only way we actually fail is to win nothing *and learn nothing*. As we know we cannot always win with each effort, we must plan in such a way that we always learn something.

We’ll discuss this topic further in the chapters on Monitoring, Evaluation, and Learning.

CHAPTER 4: CREATING A COMPELLING NARRATIVE

CHAPTER GOALS

- Identify why a narrative is vital to your organizing work.
- Explain how to develop an effective personal narrative.
- Explain how to develop an effective campaign narrative.
- Help you develop your own personal narrative through examples and worksheets.

We've talked about principles and practices of effective campaigns, and the scope and importance of campaign planning. You may be asking now, "Why focus on telling stories?" As we have noted before, our campaigns are efforts to enhance the power of organized people over that of organized money. So, people are our special sauce. And people are attracted to stories—stories they can identify with, stories that connect them to the people around them, and stories that inspire them.

WHY ARE CAMPAIGN AND PERSONAL NARRATIVES IMPORTANT?

To build the relationships that lead to an expanding base of supporters, you need to spend time with other people, connecting with them around their values and their personal interests. A good organizer and leader does this by sharing their own personal story, and connecting it to a concise and compelling campaign narrative.

The personal narrative is—you guessed it—all about you. It is personally revealing and invites others into a sense of intimacy with you. That sense of closeness is the cement that will bond together the teams of people that power your campaign.

Telling your personal story, particularly in the early stages, is likely to make you feel uncomfortable. For many of us, putting up walls of personal distance and barriers to our deeper selves is a means of protection—from criticism, from vulnerability, from exposure. As organizers, we have to push past that discomfort. What you will find is that most often, people respond to your opening up by opening up themselves. And when that happens, the magic begins.

The campaign narrative is a story that anyone within the campaign can use to engage others in the community

AN EFFECTIVE CAMPAIGN NARRATIVE

includes a vision, theory of change, and timeline, as well as goals, roles, and actions people can take—and why all of it matters.

to take action. An effective narrative includes a vision, theory of change, and timeline, as well as goals, roles, and actions people can take—and why all of it matters.

The campaign narrative should be used in any campaign outreach events that happen as you develop and launch the

campaign. Early in the campaign, plan to train leaders in communicating in a motivating, inspiring, and effective way that will contribute to building your base.

You and the other leaders will use your campaign story in a variety of contexts, but should start simply by talking with people about it one-on-one. From a one-

on-one meeting in a coffee shop, you may progress to sharing your story at community meetings, at hearings, when talking with legislators, or for media events. Story-sharing is a critical tool you will use to engage people and organize them to work for your campaign.

DEVELOPING YOUR PERSONAL NARRATIVE AS A CAMPAIGN LEADER

STORYTELLING IS A LEADERSHIP PRACTICE.

Your story is the "why" of your organizing work—the art of translating values into action through narrative. Storytelling is an iterative discussion process through which individuals, communities, and nations construct their identities, make choices, and inspire action.

EACH OF US HAS A COMPELLING STORY TO TELL.

Each of us has a story that can move others. Your personal narrative is a story that connects you to others and helps you develop relationships based on shared experiences, values, beliefs, and interests. From these shared elements, emotions are engendered that facilitate action. The story-sharing process combines elements of the head, heart, and hands to motivate and persuade others to commit to collective action. For example, a person is more likely to get involved with a campaign about stopping a coal plant if they can identify with a story about health concerns related to asthma.

WHEN IS A NARRATIVE USED?

A personal narrative can be used when you want to build relationships that lead to shared action: in one-on-one meetings, community meetings, and meetings with partner or allied organizations. You can also use your story in formal settings where you seek to persuade or move decision-makers, such as press conferences, hearings, and rallies. Finally, you can use these stories in other communication channels, such as media interviews, email blasts, blog posts, and other online or social media venues.

WHAT MAKES AN EFFECTIVE PERSONAL NARRATIVE?

1. Building a story around choices you have made

A story is about something that happens, or has the potential to happen, that ignites audience curiosity. A personal narrative that motivates others to take action can be built around a narrative arc of action.

- **Challenge:** What is the specific challenge, and why is it your personal challenge? What internal and external factors brought you to this point?
- **Choice:** What is the choice you made? Why did you make it? What led you to make your decision? Who influenced you, and how did they affect your decision?
- **Outcome:** What was the outcome? Was it the

desired outcome? Was it directly influenced by any factors in particular? What can we do from here?

Using this narrative arc of action for your story creates the opportunity for your curious listeners to reflect and relate: Do they have similar challenges? Would they make similar choices based on values or interests? This reflection lends itself to a call to action—an immediate choice for the listener to take action themselves, motivated and inspired by what they felt connected to in your own story.

2. Building a story that connects head, heart, and hands

Leaders employ both the “head” and the “heart” to mobilize others to act effectively on behalf of their shared values. In other words, they engage people in interpreting why they should change their world (their motivation) and *how* they can act to change it (their strategy).

Many leaders are good at the analysis side of public speaking; they focus on presenting a good argument or strategy. Other leaders are good at telling their personal story, often a tale of heartbreak that educates us about the challenge, but doesn’t highlight the choices and the potential for hopeful outcomes.

Our storytelling work is an effort to involve the head and heart—and then move people to use their hands and feet in action.

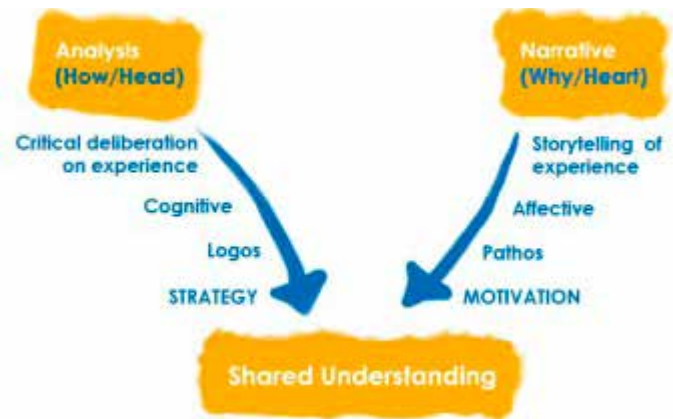
The key to using this storytelling model is understanding that *values* inspire *action* through *emotion*.

Emotions tell us what we value in ourselves, in others, and in the world, and they enable us to express our value-based motivations to others. In other words, even though we experience values emotionally, they are what actually move us to act; it is not just the idea that we *ought* to act that drives us to do it. Because our stories allow us to express our values not as abstract principles, but as lived experiences, they have the power to move others, too.

3. Building a story that connects to emotions and motivates people

There are specific emotions that facilitate action; there are also emotions that can inhibit action. The challenge of creating a good story is to acknowledge the inhibitors, but then bring the listener to share or feel emotions that motivate and inspire action.

A story may begin with a fear, a feeling of self-doubt, isolation, inertia, or apathy, but ultimately, it needs to lead to the choice to set those emotions aside in exchange for hope, self-efficacy (the sense that “you can make a difference,” or YCMAD), solidarity (the sense that together we can make difference), anger or unwillingness to accept the status quo, and urgency for change.



A story could start by recognizing the legitimate concerns of the listener—acknowledging the feelings of anger, doubt, and isolation, but then sharing stories of other choices that exist.

Ultimately, if someone’s heart and emotions are creating a wall that is blocking them from taking action, we can best address those emotions through stories that inspire and motivate. These types of stories may work to inspire action where the delivery of facts, figures, and other data has failed.

4. Building a story based on reflection and self-awareness

Sharing personal stories can be uncomfortable. There is always a question of how much to reveal about oneself. But stories based on reflection and self-awareness will resonate more with listeners. Opening up about some-



thing that may be a shared experience helps to build relationships between people.

Your stories need to reflect your thinking through “I” statements (e.g., “I felt,” “I wanted,” “I understood,” etc.). Your story should appeal to others, but not speak for them. You should avoid making broad generalizations about needs of the community or broad assumptions about the audience.

5. Keeping it concise

A three minute personal story is compelling, but a 15-minute story can feel alienating. Conversation is built around reciprocity: I say one thing, you reply and add your thoughts, I respond and reinforce, and the cycle continues. If we occupy too much time and space, that reciprocity is lost and our partner can feel left out and ignored.

So, how to keep our personal narratives short? Here are a few tips:

- **Share one specific piece of your experience.** A personal narrative needn't be your life story. Pick one decision-point in your life, and focus on that.
- **Build multiple narratives.** Think about creating three or four different stories, each of which reflects a different experience or aspect of your true self. This can help you to draw a story appropriate to a specific circumstance, and if you share stories often (and you should!), it will create even deeper connections with folks who listen on more than one occasion.
- **Practice!** Find a friend or partner and ask if you can practice your storytelling with them. Use a stop-watch to keep it to 3 minutes or less, and welcome their feedback. Again, we can feel vulnerable in sharing an aspect of our true selves, but a good friend can help us to shape the best possible story.

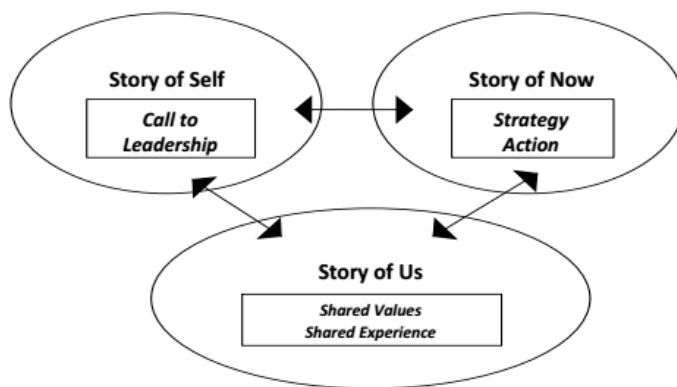
CAMPAIGN NARRATIVE: BUILDING A STORY THAT MOVES OTHERS INTO ACTION

The story structure we use to move people into specific action is created from your personal or self-story, the audience-inclusive, or “us” story, and the collective action story—what we can do together *now*. We call these three pieces the “Self, Us, Now” story elements.

1. The Story of Self

The Story of Self is directly connected to your personal narrative. It tells why you are called to a specific campaign, while describing who you are as a person. It shares your values, experiences, and actions to better inform the audience of who you are and what led you to this position. This helps connect the audience to the leader. What are the main obstacles you overcame, and what decisions led you to progress past those hurdles? These are called “choice points,” the key moments that led you to this path based on informed emotional and logical reasoning. Be articulate and detailed in your storytelling to create a powerful ethos—a credibility of self and ethics.

For people to believe you, they must first understand where you are coming from and how you got here. The audience needs to know your passion and determination for this campaign, and find out where this dedication



comes from. The more you present your authentic self, the more willing an audience will be to listen to you and take an active role in the campaign.

2. The Story of Us

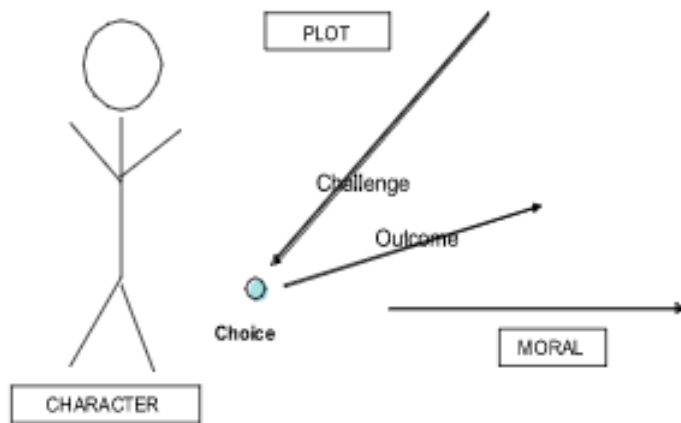
The Story of Us unites your message to that of the audience. It connects the shared experiences, values, and actions of the community and establishes an emotional context, a collective identity that the audience draws on and feels a part of. It describes what led the community to this situation, and what steps we must take to achieve the campaign goals. The story should state obstacles the community has faced, as well as how its actions to persevere have led to a brighter outcome. This connects a personal achievement to a public achievement, and your emotional motivation expands into a communal motivation that spurs action.

When people feel they have a personal connection to the speaker, not only will they listen more attentively, they will also be more inclined to follow the speaker's actions. For example, if you grew up in an affluent suburb of Los Angeles and you were presenting your campaign to an underprivileged community in the inner city of Detroit, it might be difficult for the community to feel a resonance or connection with you, unless you described common values, goals, and beliefs. Even though your backgrounds and experiences might not match, you can find common ground to build on for a shared future. The emotion of connectivity ingrains a sense of integrity and authenticity that you otherwise would have to develop over time.

3. The Story of Now

A Story of Now instills urgency and a call to action. It poses future implications if the goals of the campaign aren't met and, by contrast, if the goals are met. The Story of Now should:

- Talk about different possible futures—how things will look if we are succeed in our goals, and how they will look if we fail.
- Connect the positive elements of the success story to the personal lives of those in the community, tying into the “Story of Us.” The story should artic-



ulate the need for action and your plan to achieve the goals.

- Clearly define and outline your plan, as well as the steps the community can take to actively participate. It should be a hopeful story about creating a better future, one that encourages others to take a leading role.
- Explain what is at risk and why urgent action can create lasting, tangible change.
- Provide examples of small success stories to encourage people that change is possible.

COACHING TIPS FROM AMERICAN ASSOCIATION OF UNIVERSITY WOMEN (AAUW): YOUR PERSONAL NARRATIVE

Remember to balance both positive and constructive critical feedback. The purpose of coaching is to listen to the way stories are told, and to think of how the story-telling could be improved.

DON'T simply offer vague “feel-good” comments (e.g., “That was a really good story!”).

DO coach each other on the following points:

- **The Challenge:** What were the specific challenges the storyteller faced? Did the storyteller paint a vivid picture of those challenges?

“When you described _____, I got a clear picture of the challenge.”

“I understood the challenge to be _____. Is that what you intended?”

- **The Choice:** Was there a clear choice that was made in response to each challenge? How did the choice make you feel (e.g., hopeful? angry?)

“To me, the choice you made was _____, and it made me feel _____.”

“It would be helpful if you focused on the moment you made a choice.”

- **The Outcome:** What was the specific outcome that resulted from each choice? What does that outcome teach us?

“I understood the outcome was _____, and it teaches me _____. But how does it relate to your work now?”

- **The Values:** Could you identify what this person’s values are and where they come from? How? How did the story make you feel?

“Your story made me feel _____, because _____.”

“It’s clear from your story that you value _____, but it could be even clearer if you told a story about where that value comes from.”

- **The Details:** Were there sections of the story that had especially good details or images (e.g., sights, sounds, smells, or emotions of the moment)?

“The image of _____ really helped me identify with what you were feeling.”

“Try telling more details about _____, so we can imagine what you were experiencing.”

USING YOUR PERSONAL NARRATIVE

Take what you’ve learned back home to your state and branch:

- **Tell your Story of Self:** You’ve crafted your Story of Self; now you need to put it into action. There are numerous opportunities where telling your Story of Self would enhance your advocacy work. Try telling your Story of Self:
 - As part of a press conference
 - At an in-district meeting with your member of Congress
 - In an op-ed, letter to the editor, or blog post
 - During a one-on-one conversation with a member or prospective member
 - Whenever you are making an “ask” of someone
- **Ask others to tell their Stories of Self:** After sharing your Story of Self, ask the person(s) you are sharing with to tell his/her own Story of Self. It is through sharing our stories that we can build relationships and establish common ground.
- **Train others on creating a Story of Self:** At a branch meeting or other event, train fellow members on the concept of Story of Self and Public Narrative.

WRITING YOUR CAMPAIGN NARRATIVE

You can use this Self-Reflection Guide to help you create your own campaign narratives.

STORY OF SELF	STORY OF US	STORY OF NOW
• What influenced you to join this campaign, and why? • Reflect on your personal experiences, the times of difficulty, major choice points in your life that were meaningful (like the birth of a child or choice of a college, or how you responded to a bad situation), and consider: What did those experiences teach you that could be used as a learning point? • Bring an emotional context to your decisions. Explain how each decision and circumstance made you feel, and how those emotions persuaded your actions. • Let your excitement and passion about the subject come through. • Take the audience on a journey, and keep them interested by sharing specific details and emotions.	• Define your audience or community. Find public opinion polls (or plan to field public opinion polls, if your campaign has the resources) so you can learn about your audience's opinions, background, politics, and religious or social interests. • Actively listen to the audience's (or community's) needs and hear what is important to them. Connect on a personal level with your shared interests. • Talk to the local officials and community leaders, attend public hearings, and read news articles in local newspapers and magazines. • Use the Narrative Writing Guide provided, or create one with your colleagues, to help you share and communicate ideas. Continuously update your narrative, tailoring it to changes in your campaign or in the audience you are engaging.	• Connect this story to the campaign narrative. • Update the timeline and goals as needed for your audience. • Explain the benefits of your solution to the broader community. • Use words that evoke a sense of urgency and will motivate your audience. • Read other success stories and tailor your model around key "choice points" in those examples.

NARRATIVE WRITING GUIDE

	SELF	US	NOW
	What experiences and values led you to become a leader in the environmental field?	What shared experiences and values connect you to your audience?	Why must we act now? What is your plan?
Challenge			
Choice			
Outcome			

GROUP EXERCISE: STORY MAPPING

Story mapping is an effective method for a new team to get to know one another. It is also a useful tool for grassroots leaders to use as they form new teams. It's a way to share with someone the stories behind key "choice points" in our lives that led us to where we are now. The choices we make reveal more about our values and motivations than anything else. Sharing stories about these choices is one of the best ways to get to know someone, and remind ourselves of the values that brought us here, too.

This exercise is not about building your personal narrative. Rather, it's a way to start exercising your storytelling muscles.

INSTRUCTIONS:

This exercise will take about 20 minutes. Each person will have 6 minutes to tell their story to their partner.

STORYTELLER

Tell a story about the journey of your life that brought you here, to your involvement with the Sierra Club and the environmental movement. Focus on key choices or turning points in your life. You may want to include things like an early experience you had as a child or

student, important decisions or challenges you have faced, people that influenced you, etc. Touch on two or three separate occasions in your life that influenced why you're here now with others who are concerned about the environment.

LISTENER

Draw a life map for your partner to record their story. You can use words, pictures, lines, and arrows. Be creative. Don't show your map or talk about your work until your partner has finished telling his or her story.

When your partner has finished speaking, take 2 minutes to show your map to your partner and tell your partner what you heard. At the end of 8 minutes, each pair should switch and allow the other partner to share their story.

Story Mapping is a great way for people to find similarities that will eventually unite them in working toward a shared goal. You can use Story Mapping to help bring people together as a team.

For more resources on creating your personal and campaign narratives, see [Appendix II - Developing Your Campaign Narrative](#).

CHAPTER 5: DEVELOPING A SHARED UNDERSTANDING OF INTERESTS, NEEDS & RESOURCES

CHAPTER GOALS

- Give organizers a framework and the tools to promote thoughtfulness when entering new communities, and in working with existing ones in authentic relationships.
- Describe how the process of “community mapping” informs strategy and builds stronger campaigns.
- Explain power relationships in the community.

We've discussed using storytelling and personal and campaign narratives to connect with others—they are some of the ways we talk about ourselves and our work. But conversations are not one-directional. Building dialog requires respect and appreciation for what your partner(s) bring to the table. In this chapter, we'll share both a frame of mind and a set of tools that will assist the organizer in making authentic, respectful community connections.

UNDERSTANDING COMMUNITY: A CRITICAL ELEMENT TO CREATING AN EFFECTIVE CAMPAIGN PLAN

Before launching a campaign, you need to understand the people that either have an interest in or will be affected by the campaign outcomes. This is true whether you are new to a community, or have been living and/or working in the area for years. Each campaign affects members of a community differently, and it's important to plan and launch the campaign using a current, shared knowledge base. Strong campaigns, those that achieve outcomes and build the movement, are designed collaboratively.

For this reason, we invest time up front to foster or support authentic, meaningful dialog, to develop or sustain relationships, to learn and understand the cultural and historical context of the place and people we will be working with, and to research the various economic, demographic, and power factors that influence people in the community.

In terms of the campaign, “the community” is all the people who would experience benefits or effects if the campaign outcomes were achieved. Geography is a factor, but sometimes the community goes beyond those boundaries. Think carefully to ensure that all people who have an interest related to the issue are taken into consideration.

Finally, this process of engaging others is a critical tactic to ensure that our campaigns are welcoming and inclusive, and that they represent the thoughts, positions, and leadership of others in the community. The Sierra Club seeks to incorporate the [Jemez Principles](#) into all of our work. Our “community mapping” process helps to ensure that we are doing that well as we plan campaigns, and our outreach needs to be designed with these principles in mind as well.

WHAT IS A COMMUNITY MAPPING PROCESS?

Community mapping, also known as “issue mapping”

or “community needs assessment,” is a process used to build knowledge of a community. It involves traditional research methods to understand facts and numbers, as well as qualitative research to understand relationships and dynamics. The process of community mapping can bring people together through a shared understanding of a specific campaign issue as it relates to a community's context.

Community mapping helps the organizer to frame the campaign's vision and outcomes in terms of other community challenges, connections to other issues, potential economic and health effects, past efforts on the issue, existing leaders and efforts on the issue, etc. Creating this shared understanding of the community is essential to creating support and change.

There are different ways to get a clear picture of the community. Community mapping steps might include walking or driving through a community and talking to people, checking out local newspapers and coffee shop bulletin boards, setting up tabling, outreach, or canvassing events to elicit feedback, identifying potential flags, setting up one-on-one meetings with existing or potential leaders and elected officials, etc.

The point of these processes is to be curious and to take a listening stance: to be open to new ideas, information, analyses, and critique. Our campaigns should be relevant, and should resonate with and inspire real people in the community. That happens when we start with the needs and interests of the people, and build from there.

USING WHAT WE LEARN THROUGH COMMUNITY MAPPING

We use community maps to:

- Ensure that the campaign outcomes, leadership, and implementation reflect the diverse needs and interests of the community.
- Engage potential leaders, partners, and allies from the beginning.
- Understand power within the community, including our own power.
- Develop our organizing strategy.
- Build relationships in the

JEMEZ PRINCIPLES

- Be Inclusive
- Emphasis on Bottom-Up Organizing
- Let People Speak for Themselves
- Work Together in Solidarity & Mutuality
- Build Just Relationships Among Ourselves
- Commitment to Self-Transformation

community that share power and resources.

Putting the Basics in Place

To acquaint yourself with the community through the lens of the campaign work, here are some key points to keep in mind:

- Dedicate some time to learning more about your community and create a plan for outreach. This could be a period of weeks or months. This learning is through the lens of your campaign objectives, so even if you've lived in the area for years, this should be an opportunity for a fresh take.
- Begin to build a knowledge base of your organization's activity in the community that includes stories of success as well as problematic relationships, controversial decisions, negative news stories, etc. Identify ways to build on successes, as well as acknowledge and own any challenges. Evaluate the current state of trust and connection that your organization has with other organizations and civic leaders. If there is a high level of distrust, plan to spend more time rebuilding trust before you have conversations (see the example story in the sidebar).
- Organize yourself and other leaders to implement a "listening campaign" that combines one-on-one meetings, group meetings, and other efforts to elicit thoughts about the campaign from others (more on this in the following sections).
- Design a reporting approach you will use to gather data and build the knowledge base or "community map" you want for your campaign.
- Compile the community map information in a format that can be shared broadly to inform the planning and evaluation of your campaign.
- Use the community map information to inform strategic planning efforts to identify strengths, weaknesses, opportunities, and threats, as well as potential opportunities to build power by sharing resources, supporting new community leaders, creating alliances, or working in coalition.
- Use the community map information as you map power relationships of campaign targets and consider ways to shift power over time.
- Continuously add to or evaluate community map information to ensure that it's relevant and useful.
- Engage potential leaders, partners, and allies, and offer to share your map with them.

COMMUNITY MAPPING CAN CREATE OPPORTUNITIES FOR BUILDING TRUST

In one community, the organizer discovered that there were continued hard feelings and high levels of distrust about a lawsuit that her organization had settled 10 years in the past. The people she talked to did not understand that the case had a high likelihood of losing in court and saw the subsequent settlement as a stab in the back. After learning about this history, the organizer brought in some of the lawyers that were involved in the original case to talk about what happened and answer outstanding questions. This took time, but ultimately helped to re-establish relationships and build trust. The time and effort invested upfront to hear the community's concerns led to later conversations about moving forward on the issue.

Types of Information Needed for Your Community Map

To make a community map, first identify what types of information would be helpful. Spend time identifying the information your campaign already has and gaps that need to be filled. It helps to recognize that there are four basic types of knowledge that you are looking for: history and culture, constituencies, relationships and power, and context.

- **History & Culture:** knowledge about the history, culture and experiences, or vibe that is shared in the community or by various groups within a community. In particular, understanding past campaigns for change and their successes and challenges is useful. This type of information is usually gathered through one-on-one conversations, as well as by sharing stories, taking tours of a neighborhood, getting an introduction, and requesting tips for speaking in a meeting of people with certain norms. It can also come in the form of responses to tabling

questions, or concerns raised during canvassing activities.

- **Constituency:** knowledge about the numbers of people and organizations that have a demonstrated or potential interest in your campaign. This may include data about the Sierra Club's membership in an area, such as current leaders, activists, and supporters (those who have been engaged in the past year), as well as rough estimates of other organizations' membership and leadership numbers. It can also include numbers related to interests, such as, "number of households with potential for solar roofs in community," or "number of people already signed up for green energy alternatives," and "total number of energy customers" in a region.
- **Power & Relationships:** knowledge about individuals or entities with power and influence (e.g., local government, school boards, chambers of commerce, church leaders, etc.). This includes potentially underrepresented groups of people: community members that have less representation or power in decision-making, but would be significantly affected by the campaign outcome. Strive to learn how these different individuals and groups are connected with one another. Who are the historical allies? Who are the opponents? It's useful to generate information about community tools and resources that are available to challenge, persuade, or join forces with local officials. It's also useful to identify major donors, PACS, news media outlets, etc. This type of information is collected both through personal conversations and research of the power that exists (or is lacking) in a community.
- **Demographics:** It's helpful to have identified sources for information that can be updated as needed: e.g., census data, number of voters, election turnout history, income data, health statistics, religious affiliations, top employers, unemployment rates, etc.

TECHNIQUES FOR GATHERING COMMUNITY MAP INFORMATION

Here are some ideas for getting out into the community and gathering the information you need. Which techniques you use, and to what extent, will depend on available time, resources, and your existing community network.

Conduct Informational One-on-Ones

1. If possible, identify a team of people to help you conduct the community mapping process. This is a great team-building activity!
2. Create a list of potential contacts to gather information. Use the Community Engagement Wheel

template at the end of this chapter to brainstorm possibilities. Recognize the history and sensitivities of different groups and leaders. Look for personal connections within your leadership team and strive to connect with community leaders through networks, rather than with a "cold call."

3. Create a schedule to conduct meetings, and to collect information and report to the group.
4. Schedule initial one-on-one meetings with existing leaders and activists. This will help you practice these conversations with a friendly audience. It will also build understanding about the community mapping process, and help your leaders understand how it will shape choices going into a campaign launch. Don't forget to ask whether existing leaders would be interested in doing one-on-ones with you as part of this process.
5. Schedule one-on-one meetings with allies and other stakeholders.
 - Scheduling can take time, so start early. Plan to meet in person, and invite the other person to set the location, date, and time.
 - Be prepared to ask questions and listen as the first step. Ask what outcomes are important to them and determine their needs.
 - Share background information about the community mapping process. Connect similar interests and ask if they see shared goals that might unite the community to your campaign. People respond more effectively and productively when they feel like they have a stake in the outcome. This exemplifies relational power, or "power with," as described in Chapter 6.

The goal of this part of the campaign is not to recruit, but to build relationships and gather information. Recognize that many people you speak with may not have the resources to be part of a larger campaign, but should be consulted regardless. Other groups or leaders may not have time to meet with you at all. Try to do online research or ask someone with community knowledge to help you so you can be inclusive of their concerns.

Plan a Walk/Community Tour/Driving Tour

Walk or drive through the community with an individual community member or a group of community members. Gather and report on the following types of information:

- What things were pointed out to you?
- What things in the community seem to be sources of pride?
- What are sources of concern?

- Where do local community members spend their free time? (Parks, restaurants, bars, coffee shops, etc.)
- Which community events attract a lot of residents?
- What observations did you make about the community? For instance:
 - Were there yard signs? If so, for what issues?
 - Did you see solar panels on homes?
 - Were most signs in English? If not, which language(s) were used, and what does this tell you about your outreach efforts?
 - Are homes spread far apart? Do most people live in apartment buildings? How might this affect canvassing and outreach?
 - What other community organizations are present?
 - Where are the potential meeting or event locations?

Host a Community Drawing Event

- This activity is particularly useful in areas with low literacy, or where English is not the primary language. It's also a great tool for engaging the very young.
- This activity works best with small groups. Small groups based on age or gender identity can be particularly telling. In a larger group, men or older residents may be more likely to speak up and drown out other voices. If you break people up, you might gain greater perspective on how the youth view the community versus older adults, or men versus women.
- There are many ways to do this, but the idea is to have people draw their community. You could ask people to draw what they like about their commu-

nity or what they dislike about their community. Or, ask them to draw the community and then circle the good things and cross out the bad, etc.

Conduct Community Surveys

Whether conducted as part of a tabling event, door-to-door, or over email, surveys are a useful way to solicit key information, though remember: they are limited as a tool. Keep the number of questions to a minimum, provide multiple-choice responses, and provide space for people to add their thoughts if they want to. A survey should never take more than 5 minutes to complete!

USING YOUR COMMUNITY MAPPING INFORMATION

Once all the data has been gathered, share it with your planning team and use it to inform decisions going forward. In the appendix of this manual, we have included an example of a community map drawn from a past Sierra Club campaign in Southern California.

Community map in hand, you are better prepared to build a campaign plan that is well-rounded and reflective of community interests, values, and realities. Use it as a critical piece in conducting a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis as part of your campaign planning work.

Also, use your community map to look at where the current power lies, and develop strategies to connect power to your decision-maker. Look for community support and find allies.

WORKSHEET: PLANNING YOUR COMMUNITY MAPPING EFFORT

1. Describe the community (remember, it is not always limited by geography).
2. Identify the key things you need to learn.
3. Identify the <i>initial</i> timeframe for this work.
4. List the people whom you think could help you.
5. Identify how you will track your findings.
6. Identify how you will start. (Remember: Begin with what you know and what is easy to answer.)

COMMUNITY MAPPING: GUIDING QUESTIONS

1. What do you know?
 - Sierra Club history in the community and around this issue
 - Allies and/or partners
2. Who's in the area? Who cares about this issue and why?
 - Demographics (race, class, socioeconomic status, nationality, languages spoken, faiths, religions, etc.)
 - Organizations or groups that advocate on behalf of these communities
3. What's in the area?
 - Resources or organizations
 - Institutions (churches, schools, hospitals, universities, city hall, etc.)
 - Unique or problematic features (amusement parks, factories, etc.)
 - Landmarks
4. What are the issues and/or tensions? What are the issues that relate to your campaign issue?
 - Race, immigration, law enforcement
 - Hot-button issues
 - Organizations or groups prioritizing these issues (same or similar to the issue you're organizing around)
5. What are issues people care about?
 - Jobs, recreation, health, etc.
 - Organizations or groups that prioritize these issues
6. Who are the local decision-makers?
 - Mayors, city councils, utilities, etc.
7. Who influences decision-makers?
 - Community leaders/activists
 - Community groups/organizations
 - Local businesses and/or business groups
8. Environmental Justice and Social Justice groups, and issues they prioritize
 - Potential roadblocks and/or threats
 - Leaders with a bad environmental track record
 - Decision-makers
 - Businesses, etc.
9. Public places of congregation
 - Parks, community centers, etc.
10. What is happening in the community?
 - Calendared cultural events/activities

For a detailed sample community map, see **Appendix III - Sample Community Mapping Analysis**

TEMPLATE: COMMUNITY ENGAGEMENT WHEEL

This wheel illustrates how to think about segmenting important community institutions. The number of segments and their labels will vary according to the campaign and community.



INCORPORATING JUSTICE INTO ENVIRONMENTAL WORK: CONFRONTING POWER AND PRIVILEGE

By Dean Hubbard and Joe Uehlein

In this chapter, we will briefly summarize how climate disruption disproportionately affects people around the world, and the historical context for how power and privilege have contributed to these disproportionate effects. We will also provide a framework for organizers to effectively confront and transform power and privilege as they drive the transition to a more just, clean energy economy.

Climate disruption disproportionately harms people who are already vulnerable, marginalized, and exploited.

According to the scientists of the Intergovernmental Panel on Climate Change (IPCC), climate disruption is already affecting all of us, with the worst yet to come. But the killer heat waves, wildfires, and deadly floods that are already devastating people around the planet are taking a disproportionate toll on poor and working-class people, children, indigenous people, and the elderly. And, people in the less-developed global south are generally suffering greater effects than people in the more developed northern part of the globe. As the IPCC scientists point out, most governments do not have systems in place to protect these populations.⁶

Looking beyond current effects to future risks, the IPCC scientists acknowledge, “Many key risks constitute particular challenges for the least developed countries and vulnerable communities, given their limited ability to cope.”⁷ Working people will be particularly hard hit if we allow fossil fueled climate disruption to continue.⁸

In fact, the most recent IPCC report warned for the first time that climate disruption, combined with poverty and economic shocks, could lead to wars and large numbers of climate refugees.⁹ In the words of Rajendra Pachauri, chair of the IPCC, “Nobody on this planet is going to be untouched by the impacts of climate change.” But the most vulnerable populations will suffer the most.

The Climate Gap in the United States

Studies in the U.S. have confirmed that the “climate gap” identified by the IPCC exists here as well: The health consequences of climate disruption will harm everybody in the U.S., but poor people and people of color will be hit the hardest. Extreme heat leads to increased

illnesses and deaths, particularly among the elderly, infants, and African Americans. Risk factors for heat-related illnesses and death are higher for low-income neighborhoods and people of color. Air conditioning and transportation to cooler places are critical coping tools during a heat wave, but poor people and people of color are less likely to have access to them.

Moreover, the economic consequences of climate disruption hit low-income neighborhoods and people of color the hardest. Prices for necessities are expected to skyrocket as a result of climate disruption. Low-income families already spend a bigger proportion of their income on food, energy, and other household needs than higher-income families. With climate disruption, that spending gap will grow. Climate disruption will dramatically reduce job opportunities or cause major employment shifts in sectors such as agriculture and tourism that predominantly employ low-income people of color, and those jobs that remain will become more dangerous.¹⁰

Historical Context: How Power and Privilege Have Contributed to Disproportionate Climate Effects

Why does climate disruption hit the most vulnerable people first and hardest? Humanity’s state of persistent and deepening global inequality has deep roots. People of all colors and genders suffer from economic and environmental injustice, but throughout the world, women and darker-skinned people are disproportionately crushed at the bottom of the pyramid of wealth and power, while the inhabitants of the loftier bastions overwhelmingly tend to be lighter-skinned and male. For centuries, powerful actors have steadfastly built and defended oppressive economic and political structures premised on colonialism, racism, and patriarchy.¹¹

In the United States, the ripples from centuries of slavery and feudalism continue to arrive on the shores of our lives today, affecting who gets hit first and worst by the effects of climate disruption. Hurricane Katrina, for example, was in many ways a manmade disaster with deep historical roots. Post-Reconstruction “Jim Crow” racial segregation laws and discriminatory covenants in real estate deeds contributed to the fact that the flooded areas of New Orleans were predominantly—although not exclusively—African American neighborhoods, while

6 IPCC, Climate Change 2014: Impacts, Adaptation and Vulnerability, March 31, 2014, <http://www.ipcc.ch/report/ar5/wg2/>.

7 IPCC, Climate Change 2014: Impacts, Adaptation, and Vulnerability: Summary for Policymakers, p. 13. http://ipcc-wg2.gov/AR5/images/uploads/IPCC_WG2ARS_SPM_Approved.pdf.

8 Ibid.

9 Suzanne Goldenberg, “Climate change a threat to security, food and humankind – IPCC Report,” The Guardian, March 31, 2014, <http://www.theguardian.com/environment/2014/mar/31/climate-change-threat-food-security-humankind>.

10 Rachel Morello-Frosch, Ph.D., MPH, Manuel Pastor, Ph.D., and James Sadd, Ph.D., *The Climate Gap: Inequalities in How Climate Change Hurts Americans & How to Close the Gap* (University of Southern California, May 2009), <https://dornsife.usc.edu/pere/climategap/>.

11 See: e.g., Frantz Fanon, *The Wretched of the Earth* (Grove Press 1963), 303–316; Eduardo Galeano, “Open Veins of Latin America: Five Centuries of the Pillage of a Continent,” (Monthly Review Press 1973) (1973), at 11–204; Edward W. Said, *Culture and Imperialism* (Vintage Books 1993), at 3–14.

the undamaged areas on higher ground were predominantly white. Overall, the most vulnerable people turned out to be at the greatest risk, and had the fewest resources for returning and rebuilding.¹²

Employment relations also reflect this ancient pyramidal hierarchy, affecting, among other things, which people can afford to live only in the locations most vulnerable to climate disruption. The so-called 99 percent still work for their daily bread by producing the goods, services, and information that constitute our economy,¹³ while serving the 1 percent who possess and control the means by which working people produce that information.

The centuries-old global differentiation by geography, race, and gender has taken new political and economic forms over the last several decades. Since World War II, political and economic elites in the United States have dominated the institutions of global power. Unfortunately, our representatives have been at the forefront of implementing policies and structures that have increased and institutionalized global inequality and environmental devastation, helping to transform the promise of global equity reflected in the United Nations (UN) Charter and the Universal Declaration of Human Rights into a disappointingly familiar domination of the many by the powerful few.¹⁴ These power relations are also reflected in the policies established and implemented by the international financial institutions (IFIs) established under the auspices of the United Nations.

The IFIs, steeped in neoliberal, “free market”¹⁵ ideology, have empowered powerful economic actors to lay claim to the world’s resources, at the expense of its working and poor people as well as the planet’s ecosystems. These institutions are facilitating a hyperconcentration of market power that has grown beyond the reach of national governments. For example, both the World Bank and the IMF (International Monetary Fund), which

are dominated by the U.S. and other developed countries, have used their economic leverage to impose “structural reforms” that force countries to fundamentally change their economies in ways that benefit transnational corporations, but adversely affect the economic and environmental well-being of their residents.¹⁶ Moreover, both trade agreements negotiated under the General Agreement on Tariffs and Trade (GATT), and institutions such as the World Trade Organization (WTO), protect the interests of transnational capital from state intervention on behalf of workers and the environment. In effect, governance decisions have been transferred to transnational corporations, which by definition serve only the interests of their dominant shareholders.

As authorities like Nobel laureate economist Joseph Stiglitz and author and global justice activist David Korten argue, these institutions have clearly met their goals of fostering international trade, but they have failed in their stated purpose of distributing its fruits.¹⁷ The gap between rich and poor is widening.¹⁸ Credible reports suggest that the world has more poor people today than ever.¹⁹ Global violence is tearing nations, communities, and families apart.

The “neoliberal” economic philosophy is a resurrection of the “every man for himself,” *laissez faire* ideology of the Industrial Revolution, which was broadly discredited during and after the Great Depression. Also referred to as “neoclassical” economics, this philosophy emerged during the second half of the 20th century, and is characterized by a set of policies that discourage state regulation of corporate interests, but—ironically—often favor strong state intervention to protect those interests. In the words of one commentator, it is “capitalism with the gloves off.”²⁰ Neoliberal policies were widely implemented in the United States and around the world beginning in the Reagan-Thatcher era of the early 1980s. Since then, neither Democratic nor Republican administrations have challenged the basic premises of this economic theory.

These policies dismantle laws and regulations designed to protect the environment, which gives corporate polluters a free hand to use outdated fossil-fuel technologies to pour climate-disrupting and cancer-causing pollutants into the atmosphere. Indeed, they stimulate a global race to the bottom, in which those who pay least

12 See: (Katrina): Roger Abrahams with Nick Spitzer, John Szew, and Robert Thompson, *Blues for New Orleans: Mardi Gras and America's Creole Soul*, (Philadelphia: University of PA Press, 2006); John M. Barry, *Rising Tide: The Great Mississippi Flood of 1927*, (New York: Touchstone, 1997); Craig Colten, *An Unnatural Metropolis: Wrestling New Orleans from Nature*, (Louisiana State University Press, 2005); Arnold Hirsch and Joseph Logsdon, eds., *Creole New Orleans: Race and Americanization*, (Louisiana State University Press, 1992); Jed Horne, *Breach of Faith: Hurricane Katrina and the Near Death of a Great American City*, (New York: Random House, 2006); Ivor Van Heerden and Mike Bryan, *The Storm: What Went Wrong and Why During Hurricane Katrina*, (Viking Adult, 2006).

(Sandy): “Impacts of Sea Level Rise in the New York City Metropolitan Area,” Global and Planetary Change (December 2001), <http://www.sciencedirect.com/science/article/pii/S09218181010001503>; “Physically based assessment of hurricane surge threat under climate change,” Nature Climate Change (January 2012), doi.org/jnm; “Developing coastal adaptation to climate change in the New York City infrastructure-shed: process, approach, tools, and strategies,” Climatic Change (May 2011), doi.org/fdq5g8; “How Global Warming Made Hurricane Sandy Worse,” Climate Central (November 1, 2012), <http://www.climatecentral.org/news/how-global-warming-made-hurricane-sandy-worse-15190>; “Hurricane Sandy Damage Partly Caused By Climate Change, Scientists Say,” Huffington Post, November 6, 2012, http://www.huffingtonpost.com/2012/11/06/hurricane-damage-climate-change_n_2081960.html; “Climate Change Didn't Cause hurricane Sandy, But it Sure Made it Worse,” Mother Jones, November 8, 2012, <http://www.motherjones.com/kevin-drum/2012/11/climate-change-didnt-cause-hurricane-sandy-it-sure-made-it-worse>.

13 This includes unpaid care work, performed mostly by women, which the U.N. states, “is essential to the functioning of the economy, but often goes undercounted and unrecognized...” Report of the Secretary-General, “Women in Development,” United Nations General Assembly (2013), 10, http://www.un.org/ga/search/view_doc.asp?symbol=A/68/271.

14 See: e.g., Dean Hubbard, “Reimagining Workers’ Human Rights: Transformative Organizing for a Socially Aware Global Economy,” *S. Hastings Race & Poverty Law Journal*, 110 (2008).

15 See: e.g., Robert W. Gordon, “Some Critical Theories of Law and Their Critics,” in *The Politics of Law: A Progressive Critique*, Third Edition, at 651-652 (David Kairys ed., Basic Books 1998); Peter Gabel and Jay Feinman, “Contract Law as Ideology,” in *Ibid.* at 497-498, 504-509; Richard L. Abel, “Torts,” in *Ibid.* at 452.

16 Some of the common “structural reforms” imposed by the IMF and World Bank include privatizing state enterprises; eliminating regulations that protect workers and the environment; reducing wages; removing restrictions on foreign investment; cutting restrictions on imports; devaluing local currency; and reorienting national economies towards exports and away from self-sufficiency. Walden Bello, “Structural Adjustment Programs: ‘Success’ for Whom?,” in *The Case Against the Global Economy* (Jerry Mander & Edward Goldsmith eds., Sierra Club Books 1996) at 286.

17 Joseph E. Stiglitz, *Globalization and its Discontents* (W.W. Norton 2002) (1996), at 14, 18. David C. Korten, “The Failures of Bretton Woods,” in *The Case Against the Global Economy*, *supra*, at 21-22.

18 United Nations Development Program, *Human Development Report 2005* at 32-39 (2005), http://hdr.undp.org/reports/global/2005/pdf/HDR05_chapter_1.pdf.

19 Robert Wade, *Globalization, Poverty and Income Distribution: Does the Liberal Argument Hold?* (Development Studies Working Paper series no. 02-33, (2002).

20 Noam Chomsky and Robert McChesney, *Profit over People: Neoliberalism and Global Order*, (Seven Stories Press, 2011).

for environmental and climate protection profit most. Corporate polluters don't have to pay for the damage they do to people and planet—that must be paid by the rest of us.

The same set of political and economic policies allow the incomes of the wealthiest 1 percent to skyrocket, while the incomes of everyone else stagnate and union density declines to historic lows. In the United States, since at least the early 1980s, we have seen well-paid, unionized manufacturing jobs moved offshore to lower wage markets, traditional long-term employment replaced by intermittent contingent work, increasingly intractable structural unemployment, and those who have jobs working longer hours and more productively, but with less security and little to show for it economically.



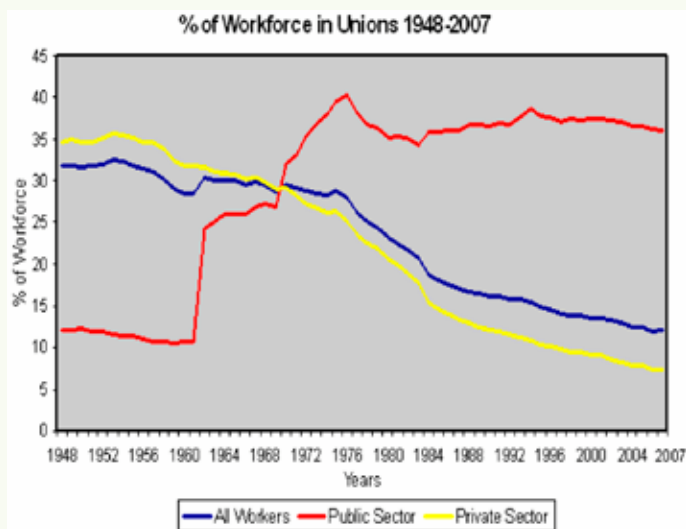
Source: Ramsin Canon, "Wage Theft Outrage: Broken Labor Law and the American Worker"

Unions can help rectify this imbalance of power. When unions are stronger, the economy as a whole does better.²¹ Unions restore demand by raising wages for their members and putting more purchasing power to work, enabling more hiring. When union density is high in a sector or region, unions also lift wages even for people who aren't union members by creating a higher prevailing wage.

On the other hand, when unions are weak, hiring slows and inequality deepens. In the United States, both legal protections for workers' freedom of association and union density in the private sector have experienced precipitous declines, in parallel with the offshoring of employment and the other negative dynamics noted above. At the end of 2013, union density in the United States was at its lowest level in a century, with overall density at 11.3 percent and private sector at 6.7 percent.²² Now, according to the U.C. Berkeley Labor Center, "workers' rights to organize are routinely violated by

21 David Madland and Nick Bunker, *States with Stronger Unions have Stronger Middle Classes*, Center for American Progress (2012), <https://www.americanprogress.org/issues/labor/news/2012/09/21/38900/states-with-stronger-unions-have-stronger-middle-classes-2/>.

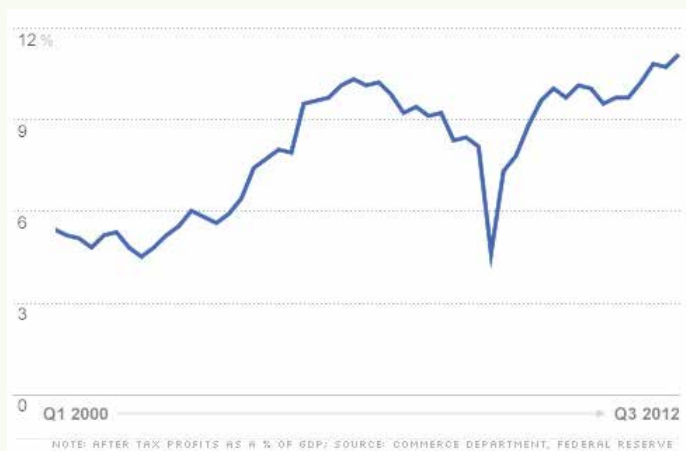
22 United States Department of Labor, Bureau of Labor Statistics, "Union Members Summary" (Jan. 24, 2014), <http://www.bls.gov/news.release/union2.nr0.htm>.



Source: Harvard University Labor and Worklife Program

employers throughout the country through both legal and illegal means."²³ The decline in unionization rates helps explain why we have record-high inequality and wage stagnation, even as we have record-high corporate profits and productivity.²⁴

After-tax corporate profits as a percentage of gross domestic product (GDP):



For many Americans, the dream of a middle-class life is a fading illusion. Many workers, unable to access opportunities in the present economy, are trapped in competition for ever more exploitative and soon-to-vanish fossil-fuel industry jobs, even as their families suffer the ill effects of irresponsible extraction and combustion.

People of color, undocumented immigrants, and women continue to suffer unfairly and disproportionately from these unhealthy and unjust trends.

So what can we do about all this, and what does it have to do with clean energy?

23 U.C. Berkeley Labor Center, *Workers' Rights Overview*, <http://laborcenter.berkeley.edu/workers-rights/overview.shtml>.

24 Bruce Western and Jake Rosenfeld, "Unions, Norms and the Rise in U.S. Wage Inequality," *American Sociological Review* (August 2011), <http://www.asanet.org/images/journals/docs/pdf/asr/WesternandRosenfeld.pdf>.

How We Can Confront and Transform Unjust Power and Privilege as We Build a Clean Energy Economy

The good news is that the challenge of transforming the fossil fuel-based energy economy to 100-percent clean energy presents an unprecedented opportunity to fundamentally break with the market-driven and exploitive relationships and dynamics of the past, and embrace policy solutions and institutional relationships predicated on environmental, economic, and racial justice.

Thanks in part to the Sierra Club's work, renewable energy has become cost-competitive with fossil fuels, including coal, oil, and natural gas, as well as with nuclear power. The investments in energy efficiency, clean energy, climate resilient infrastructure, a modernized, smart power grid, and other measures needed to mitigate climate disruption will produce major additional benefits throughout the U.S. economy, making the clean energy economy a new engine of U.S. job creation. Reputable economists have concluded that the investments necessary for the U.S. to make its minimum contribution to global emissions reductions will create millions of new jobs.²⁵

However, whether these jobs will be good jobs depends on how we transition to clean energy. The clean energy economy is not immune from the broader political and economic trends we've described here. To build a climate movement with the power to achieve a clean energy vision that is ambitious enough to stop irreversible climate disruption, people must believe that a clean energy economy is one in which they will be economically secure. Market forces alone will not create a fair and just clean energy economy. For that to happen, we must reverse the destructive economic policies of at least the past 35 years.

As we've seen, the people who are the most economically vulnerable are already suffering the most from climate disruption. The "invisible hand" of the market won't make sure clean energy jobs are good jobs, or that they go to the people who desperately need them, especially people from economically and environmentally devastated communities. The promise of clean energy will only be genuine for these communities, including workers and communities affected by the transition from fossil fuels to clean energy, if we plan and carry out a strategy to foster healthier, more just communities by *simultaneously* building environmental, economic, and racial justice.

Thus, as the Sierra Club advocates to expedite the clean energy transformation, we are called on to advance solutions that foster healthier and more just communities, by helping to ensure clean energy jobs are good jobs, and by addressing the needs of workers and communities whose livelihoods are affected by the transition—those of low-income communities hit hardest by climate disruption and fossil fuel pollution, and of consumers disproportionately burdened by energy costs.

We not only need to identify the right policy prescriptions and model solutions, but also to mount broad and strong grassroots pressure demanding them. At the policy level, issues of economic justice and fairness must guide our policy decision-making and prioritization on clean energy-related issues. Our communications should give these issues greater attention. And our grassroots leaders need support, in the form of tools and training, to be able to engage with affected workers, consumers, and justice advocates, and to articulate and advocate for justice and fairness—in local and state policy settings and at the community level.

We have fantastic tools to help us do this, as we fulfill our commitment to become a more diverse, equitable, and inclusive organization. These tools include the [Jemez Principles](#) for Democratic Organizing, and the Sierra Club's Environmental Justice Guidelines. Using these tools, we can listen to, elevate, and amplify the voices and leadership of those most affected, as we integrate the following substantive principles into all our clean energy work:

- Clean energy jobs must be good jobs.
- Workers and communities affected by fossil fuel transitions must be treated fairly and justly.
- Disadvantaged communities must have equitable access to clean energy-related economic opportunities.
- Clean energy must be affordable.

Clean Energy Jobs Must Be Good Jobs

It is not enough that a transition to clean energy will create jobs, they must be good jobs: that is, they are safe and healthy, and they pay enough for working people to support themselves and their families. As we build the movement for 100-percent clean energy, we need to ramp up this work. Our country needs more domestic solar and wind manufacturing. We need to help our clean tech and union allies partner with each other. We need to answer questions about the nature and quality of jobs created in the transition from centralized to distributive generation. We need honest internal conversations about how to balance clean energy job creation with species and habitat protection. We need to fight for trade and industry policies that move us towards

25 Labor Network for Sustainability and Synapse Energy Economics, *The Clean Energy Future: Protecting the Climate, Creating Jobs, Saving Money* (2015), http://www.labor4sustainability.org/wp-content/uploads/2015/10/cleanenergy_10212015_main.pdf; Robert Pollin, Heidi Garrett-Peltier, James Heintz, Bracken Hendricks, *Green Growth: A US Program for Combating Climate Change and Expanding Job Opportunities*, Center for American Progress (September 18, 2014), <http://www.scribd.com/doc/238580556/Green-Growth-A-U-S-Program-for-Controlling-Climate-Change-and-Expanding-Job-Opportunities>.

positive solutions to these problems, such as domestic content requirements.²⁶

Where we combine strong clean energy policies with high-road employment practices, we reduce emissions and create family-sustaining careers. For example, in California, a blue-green partnership for smart national and statewide clean energy policies and high-road employment practices led not only to a near doubling of clean energy generation in the state's electric sector (from 11 percent in 2008 to 20 percent 2013), but also to the creation of more than 15,000 new jobs that pay workers an average of \$78,000 a year, plus health and other benefits.²⁷

Having a union is still the best way to assure a job that pays a living wage with good benefits and health and safety protections.²⁸ Thus, support for high-road employment practices must include support for collective bargaining and the right to organize in the clean energy sector.

Ensuring a fair and just transition for workers, families, and communities that depend on fossil fuels

As coal, oil, and natural gas consumption decline, there will be significant job losses for workers in those sectors. How the transition is managed for workers and communities that depend on fossil fuels will be of critical importance to the success of our clean energy vision. While we know that investments in renewable energy, energy efficiency, and climate-resilient infrastructure will create jobs, there is no guarantee that these job opportunities will accrue to the regions and communities that are losing fossil fuel industries.

The Sierra Club is a recognized leader in building collaboration among labor and environmental organizations and advocating for good, green jobs in the new energy economy. What we recognize, however, is that for many workers immediately threatened with the loss of livelihoods in carbon-intensive industries, the green jobs and just transition we advocate are perceived as abstract promises. The adverse effects of losing stable, middle-class careers in communities where people have few other options for family-sustaining livelihoods cannot be overstated. Abrupt and poorly planned plant closures can not only cause job losses and leave toxic clean-up sites, they can affect a community's tax base, and therefore its schools, health care, and other vital social services, and can lead to increases in crime.

We have a responsibility to continue to help address the

needs of the miners, power plant workers, and others who are already being affected by the clean energy transition, as well as the communities that depend on those industries. Not only is this the right thing to do, but continuing to drive robust transition assistance and economic development and diversification at the policy level, as well as on the ground, will help us win public support and be credible in the communities most affected by the loss of fossil fuels-based jobs.

Jeremy Brecher of the Labor Network for Sustainability describes [three core goals](#) for organizers seeking to drive a fair and just transition from fossil fuels to clean energy:

- Building jobs and economic development into transition plans;
- Ensuring job security and livelihood guarantees for affected workers and communities; and
- Reaching out to engage workers and their organizations in dialogue, consultation, and cooperation for moving beyond fossil fuels.²⁹

To achieve these goals, we need to demonstrate that we are part of the community and concerned about the well-being of the community and all its people, not just about “our” issue. Thus, we need to help drive robust public and private investments into good job creation, especially in carbon-dependent communities and regions. As we continue to raise awareness of the issue by lifting up “clean energy job” and “just transition” success stories, we must ramp up our advocacy of job creation and economic growth in areas other than resource extraction, including energy efficiency, clean energy development and manufacturing, climate-resilient infrastructure, environmental remediation, community health, sustainable agriculture, reforestation, entrepreneurship, and ecotourism.

Government has a key role in helping to drive the investments we need for a just transition to a clean energy economy. Public investment in transition assistance for workers is not new. In retiring Washington State's last remaining coal plant, the Sierra Club worked closely with the affected unions and community to insist that a multimillion-dollar, multi-year transition plan for the workers and the community was an integral part of the legislative package. From 1994 to 2004, the federal government committed significant resources to easing the transitions of communities that depended on the nuclear industry, where workers faced displacement due to nuclear plant retirements. This “Worker and Community Transition” program provided grants, along with other forms of assistance, to help diversify the economic

26 See: http://www.wto.org/english/tratop_e/dispu_e/cases_e/ds412_e.htm.

27 Peter Phillips, “Environmental and Economic Benefits of Building Solar in California,” Donald Vial Center on Employment in the Green Economy, University of California at Berkeley (November 10, 2014), <http://laborcenter.berkeley.edu/environmental-and-economic-benefits-of-building-solar-in-california-quality-careers-cleaner-lives/>.

28 See: United States Department of Labor, Bureau of Labor Statistics, “Median weekly earnings of full-time wage and salary workers by union affiliation and selected characteristics, 2012-2013 annual averages,” <http://www.bls.gov/news.release/union2.t02.htm>, and “Employee Benefits in the United States, March 2014,” Tables 2 and 9, <http://www.bls.gov/news.release/ebs2.nr0.htm>.

29 See: Jeremy Brecher, “A Superfund for Workers: How to Promote a Just Transition and Break Out of the Jobs vs. Environment Trap,” Dollars & Sense (November/December 2015), <http://www.labor4sustainability.org/wp-content/uploads/2015/10/1115brecher.pdf>.

livelihood of affected communities, ultimately creating 51,000 jobs.³⁰ The federal government should enact a comprehensive and ambitious set of policies, including legislation, additional appropriations, and executive orders, to protect workers and communities that now depend heavily on fossil fuels. In addition, states should spearhead community assistance initiatives to promote the creation of new clean energy businesses that are specifically focused on the economic diversification of affected communities.

Ensuring a just transition for communities that depend on fossil fuel-based industries is an immense challenge. However, there is enormous economic development and job growth potential in clean energy-related industries. Fostering these new industries in affected communities cannot be simply left to the market. Nor should it be, if those communities are to break the exploitive patterns of the past. Major investment in economic revitalization will be needed. And even more important will be the need for those communities to take the lead in shaping the transition and revitalization of the local economy.

Creating equitable access to economic opportunities in clean energy and energy efficiency

For the disadvantaged, low-income, and communities of color, typically disproportionately burdened by pollution and facing a multitude of challenges, there is great potential for the transition to clean energy to spur community revitalization, poverty and joblessness reduction, improved health, and citizen empowerment. In a 2013 state-by-state energy policy analysis, the NAACP details the major economic potential offered by energy efficiency and renewable energy across the country, and calls for “revolutionizing” the relationship of communities of color to the power sector to take advantage of that potential.³¹

From the work of NAACP and other partner organizations, the Sierra Club can draw guiding principles for its efforts to help foster this work. First, frontline communities must take the lead in designing the local energy economy. Community-driven processes can ensure equitable access to opportunities for local ownership of energy and local employment.

Additionally, at the policy level it is critical to support policies and initiatives targeting opportunities and investment to disadvantaged, low-income, and people of color communities. The NAACP identifies local hire and minority business enterprise provisions as especially

important policy tools to incorporate into state energy policy “to better support economic opportunities for African American entrepreneurs, businesses, and communities in the energy sector.”³²

In addition to energy savings, energy efficiency and weatherization offer non-energy benefits, including improved health associated with better air quality, improved safety, and overall improved quality of life. As the NAACP and other advocates stress, it is to ensure that the value of these non-energy benefits is recognized and included in assessing efficiency program costs and benefits.

The Sierra Club’s transportation policy objectives, in general, align naturally with the economic development goals and needs of low-income communities and communities of color. Low-income families spend as much as 55 percent of their income on transportation. Expanding access to clean, safe, and affordable transportation alternatives, including transit, biking, and walking, can reduce the transportation cost burden, increase access to jobs, and improve air quality, while also reducing oil consumption. At the policy level, advocacy for rebalancing funding in favor of transportation alternatives and for reducing tailpipe pollution has well-established and broad support, including among advocates for disadvantaged communities.

There are immense opportunities to pursue local collaboration with community advocates around transportation-related projects, such as funding, building, and expanding transit, and pedestrian/cyclist master plans, which offer multiple benefits in health, safety, quality of life, and increased economic opportunity.

Making energy affordable: reduce the economic burden for low-income energy consumers

In advancing a clean energy vision, we must confront head-on the challenge of ensuring that clean energy is affordable for all. The energy burden, or proportion of household income spent on energy bills, is much higher for lower-income households. NAACP reports that families with annual incomes ranging from \$10,000 to \$30,000 spend as much as 24 percent of their income on energy, compared to 9 percent of income for the average household making over \$50,000 annually.³³ The transition from fossil fuel-derived energy sources to clean renewables must be accompanied by strategies that ensure the energy burden for low-income consumers is eased, not exacerbated. Those strategies follow two principal tracks, which can and should be com-

³⁰ Department of Energy, *Community Assistance*, available at <http://energy.gov/lm/services/proper-ty-management/community-assistance>.

³¹ Jacqui Patterson, *Just Energy Policies: Reducing Pollution and Creating Jobs*, National Association for the Advancement of Colored People Environmental and Climate Justice Program (2013), <http://naacp.3cdn.net/8654c676dbfc968f8f...dk7mej5v0.pdf>.

³² *Ibid.*, at 48.

³³ *Ibid.*, at 36.

plementary: containing energy costs for low-income consumers, and increasing energy savings through efficiency. Too often in the past, opponents have been able to divide and weaken the consumer, labor, and environmental communities, despite the fact they have largely similar and reinforcing interests.

Thus, as we ramp up energy efficiency, we should turn to models like RePower LA, a coalition of environmentalists, labor unions, and economic justice activists. That coalition prevented L.A.'s publicly owned utility from burdening low-income ratepayers with the cost of its investments in energy efficiency. The coalition, a project of the Los Angeles Alliance for a New Economy (LAANE), successfully advocated for the utility to focus those improvements in low-income neighborhoods, where they are lowering consumers' utility bills, and to develop a program enrolling low-income Angelenos in a paid union apprenticeship program, in which they receive on-the-job training to perform those energy efficiency retrofits.³⁴ As a result of the work of RePower LA, the public utility is using its investments in energy efficiency to employ low-income Angelenos at living wages to reduce energy consumption and lower utility bills in their own communities. This work is a model for how we can move forward together.

³⁴ Judith Lewis Mernit, "Repower LA," (*Sierra Magazine*, November/December 2013), <http://vault.sierraclub.org/sierra/201311/los-angeles-energy-efficiency-green-jobs.aspx>.

Conclusion

Climate injustice, the disproportionate effect of climate disruption on already vulnerable and marginalized people, is a consequence of longstanding historical injustice, as well as more recent economic policies that have deepened these inequalities. We can help right these wrongs as we build a clean energy economy that works for all, if we plan and carry out a strategy to foster healthier communities by *simultaneously* building environmental, economic, and racial justice. To do that, we must:

- Elevate and amplify the voices and leadership of communities disproportionately affected by climate disruption and efforts to mitigate it; and
- Insist that:
 - Clean energy jobs be good jobs;
 - Workers and communities affected by fossil fuel transitions be treated fairly and justly;
 - Disadvantaged communities have equitable access to clean energy-related economic opportunities; and
 - Clean energy be affordable.

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CHAPTER 6: POWER ANALYSIS

CHAPTER GOALS

- Explain “Theory of Change” and how it demonstrates the building and use of power.
- Describe two complementary ways of thinking about power: how it is expressed, and its levels of use.
- Explain the purpose and use of a power map in campaign planning.

As an organizer deepens their understanding of the community, relationships of power become apparent: who has power, who doesn't, how it is developed and maintained, and how it is used to shape decisions and outcomes. In this chapter, we'll explore the concept of power and describe a tool for making power a deliberate piece of your campaign planning process.

THEORY OF CHANGE

The Sierra Club is committed to working on national, state, and local campaigns to achieve a 100-percent clean energy future that is just and equitable. Solutions to shape this future are becoming more feasible every day, with expansions in affordable renewable energy generation, increases in energy efficiency, and new technologies in battery storage and electric cars rolling out.

Still, some of the people we work with as organizers will be skeptical that what we are doing will result in the changes we need at the speed needed to reach safe levels of carbon in the atmosphere. To persuade the public, as well as donors and decision-makers, we need to be able to identify and provide supporting analysis for a credible theory of change.

"Theory of Change" is a concept initially developed in the 1990s as a label for describing how a set of actions actually results in real-world outcomes. It addressed what has been termed the "missing middle" of many

change initiatives—for our purposes, how the tactics of an organizing campaign will yield the real-world outcomes we seek.

Merely discussing this question can help to move a strategy from a set of good ideas to a plan that leads to results. Within the Sierra Club, we like to articulate our theory of change at two different levels: outcomes and power.

Outcomes: In the Sierra Club's work to build a 100-percent clean energy future, we seek to identify and implement a theory of change that results in two types of real-world outcomes.

1. Measurable and rapidly increasing deployment of clean energy, and corresponding reductions in the amount of carbon being put into the atmosphere.
2. Significant and tangible improvements in people's lives in areas of health and economic well-being, with specific attention to the well-being of traditionally marginalized communities.

"To persuade the public, as well as donors and decision-makers, we need to be able to identify and provide supporting analysis for a credible theory of change."

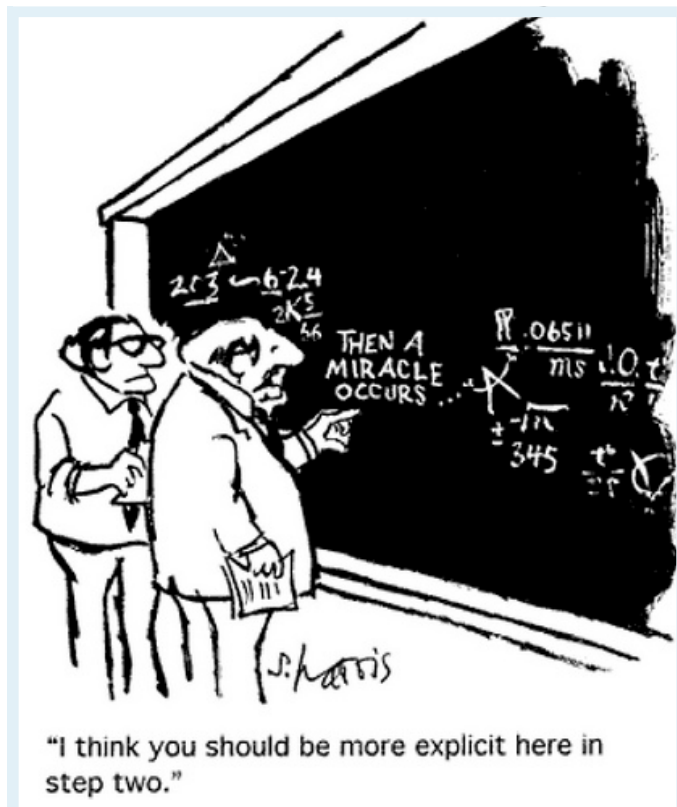
Power: In achieving these outcomes, we seek to articulate a theory of change that demonstrates how we believe our efforts will shift power relationships, by *building* the power of people most affected by climate disruption, and by *using* that power to confront visible, hidden, and invisible power structures.

As with other parts of your campaign plan, your theory of change will almost certainly change over time. We may initially believe that one set of tactics will help us to deliver power to achieve our outcome, only to learn that our decision-maker doesn't actually respond to that approach, and that it brings us no closer to achieving our outcomes.

Understanding the effects of our strategies and tactics is a function of Monitoring, Evaluation, and Learning (MEL), which we'll explore in depth later in this manual.

UNDERSTANDING POWER TO CREATE AN EFFECTIVE STRATEGIC PLAN

Defining, analyzing, and building power is a vital and continual part of citizen-centered advocacy, and central to building a realistic theory of change. We'll now look at power as a force that can either undermine or empower



Having a strong Theory of Change is essential when telling the story of how your campaign will succeed.

people, campaigns, and organizations. It is also a force that can facilitate, hasten, or halt the process of change.

We acknowledge a deep debt of gratitude to Lisa VeneKlasen and Valerie Miller. Their 2002 manual, *A New Weave of Power, People and Politics* is a critical and vital exploration and dissection of power relationships. Much of what follows on the topics of expressions and levels of power is adapted directly from their text.

EXPRESSIONS OF POWER

VeneKlasen and Miller recognized that “power” is often seen as a negative force. They devised a taxonomy of four different “expressions” of power, to tease out the source of those negative connotations and to describe how power can also be seen as a positive force for social change.

Power over

The most commonly recognized form of power, “power over,” has many negative associations, such as repression, force, coercion, discrimination, corruption, and abuse. Power in this context is seen as a win-lose relationship. Having power involves taking it from someone else, and then using it to dominate, preventing others from gaining it. In politics, those who have control over resources and decision-making have power over those who do not. When people are denied access to important resources, like clean air and water, safe living conditions, and jobs, “power over” perpetuates inequality, injustice, and poverty.

For this reason, we seek to build new forms of leadership and decision-making to promote more democratic forms of power. Practitioners and academics have searched for more collaborative ways of exercising and using power. Three alternatives—power with, power to, and power within—offer positive ways of expressing power that create the possibility of more equitable relationships. By affirming people’s capacity to act creatively, these alternative forms of power provide some basic principles for constructing empowering strategies.

Power with

“Power with” has to do with finding common ground among different interests and building collective strength. Based on mutual support, solidarity, and collaboration, power with multiplies individual talents and knowledge. Power with can help build bridges across different interests to transform or reduce social conflict and promote equitable relations. Advocacy groups seek allies and build coalitions drawing on the notion of power with.

Power to

“Power to” refers to the unique potential of every per-

son to shape his or her life and world. When based on mutual support, it opens up possibilities of joint action, or power with. Our citizen education and leadership development for advocacy are based on the belief that each individual has the power to make a difference.

Power within

“Power within” has to do with a person’s sense of self-worth and self-knowledge; it includes an ability to recognize individual differences while respecting others. Power within is the capacity to imagine and have hope; it affirms the common human search for dignity and fulfillment.

The prior chapter on narrative and the vital role of personal storytelling explains one means to affirm personal worth, and to recognize each individual’s “power to” and “power with.” Scholars writing about social change refer to both of these forms of power as *agency*—the ability to act and change the world. We aim to design campaigns that build self-worth and self-knowledge through storytelling, a deep commitment to inquiry, reflection, and learning, and continuous improvement.

LEVELS OF POLITICAL POWER

What makes political power even more difficult to analyze and confront is the fact that it is not always visible. To help activists and advocates navigate power more effectively, we describe three interactive dimensions of “power over” that shape the parameters of political participation and advocacy. These range from the more obvious and visible to those that operate largely behind the scenes. We also discuss some of the strategies used to influence and engage these different expressions of power. The less visible dimensions are, of course, more difficult to engage, since power tends to be concealed and diffused, embedded in cultural and social norms and practices.

1. Visible Power: Observable Decision-Making

This level includes the visible and definable aspects of political power: the formal rules, structures, authorities, institutions, and procedures of decision-making.

While developing strategies to influence and respond to visible expressions of power is important, it is not sufficient to overcome society’s unwritten rules and power dynamics, which often override the system’s formal rules. Despite the existence of fair laws and decision-making structures, politics never operate on an even playing field. Behind the scenes, political, economic, social, and cultural forces are always shaping who gets to sit at the decision-making table and whose issues are addressed.

2. Hidden Power: Setting the Political Agenda

This level of “power over” is less obvious—and thus,

more difficult to engage. Certain powerful people and institutions maintain their influence by controlling who gets to sit at the decision-making table and what is served on the agenda. An example is the special access granted by political leaders to large political campaign contributors. These dynamics exclude and devalue the concerns and representation of other people, and that often includes social justice groups and other organizations that seek to represent the public interest. Hidden power can also remain hidden in part because traditional media outlets can be subject to this influence.

In some contexts, powerful political interests attempt to discredit environmental groups, making it impossible for citizens without resources or affiliation to have their voices heard, or forcing them to take on the harder task of refuting negative or biased information.

3. Invisible Power: Shaping Meaning

Probably the most insidious of the three dimensions of power, this third level operates in ways that render competing interests and problems invisible. Significant problems and issues are not only kept from the decision-making table, but also from the minds of the different players involved, even those directly affected by the problems. By influencing how individuals think about their place in the world, this level of power shapes people's beliefs, sense of self, and acceptance of their own superiority or inferiority. In our country, for instance, there is a strongly held belief that individual property is of higher value than collective access to resources. This type of socialized consent prevents people from questioning or envisioning any possibilities for changing these relationships, or addressing their injustices.

Processes of socialization, culture, and ideology perpetuate exclusion and inequality by defining what is normal, acceptable, and safe. Schools, the media, and religious and political leaders, among other influential forces, shape values and norms that prevent change. In the United States, values and prejudices about people of color, the poor, and others who most often experience the immediate effects of climate disruption, are evident in and reinforced by stories and images that appear in schoolbooks, ads, and the press. These values and prejudices perpetuate negative stereotypes that limit the roles and aspirations of leaders from these communities. They can affect our own, internal organizational culture and power dynamics. They can make it harder for us to work in solidarity with communities where social norms become internalized, making people feel angry and powerless.

We believe in being realistic about power. We analyze power at all three levels—visible, hidden, and invisible—to design strategies that help us confront those who have power over decisions that affect our lives.

CAMPAIGN TARGETS AND POWER

As part of our campaign planning process, we identify the individuals who have the decision-making power to achieve the outcomes we seek. These individuals rarely operate in isolation. They include elected government officials, appointed government officials, heads of corporations, judges, heads of educational institutions, and those at the helm of faith, labor, health, and other social organizations. And they work within decision-making venues—legislative, administrative, judicial, corporate, and others—that provide some, but rarely all, of the influence (power) that shapes their choices.

Once our target is chosen, it is essential to understand as many of the sources of influence that act on the target as possible. Understanding these sources provides the essential context for our work to shift those power relationships, and increases the ability of the community to assert its own power, both on this specific decision and on future decisions affecting their own welfare.

Our tool for understanding the web of power relationships influencing our target is the power map.

WHAT IS A POWER MAP?

A power map is a visual representation of decision-makers and how they are connected to others in terms of power and influence. It's an efficient tool to display influence, opposition, and support that should be completed after you set the campaign goals. A power map shows the key decision-makers and plots their relationships along an x-and-y coordinate graph, allowing the team to effectively create and follow a path to the goal.

WHY USE A POWER MAP?

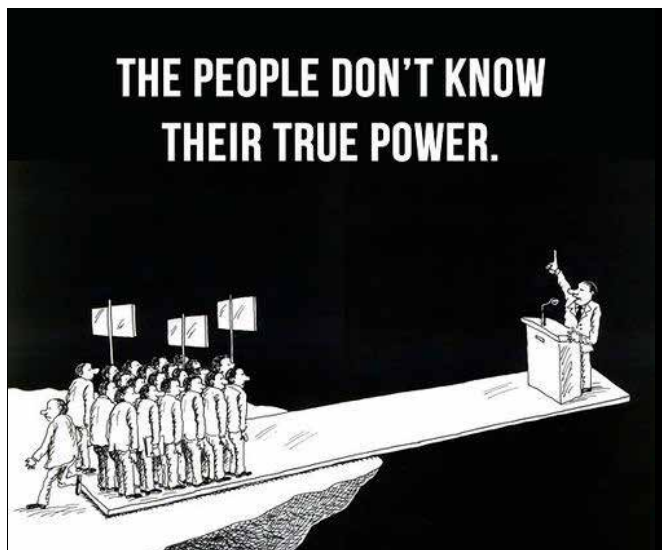
A power map helps break down the sources of influence on our target. It identifies whether a strategy to influence the decision-maker is realistic, and displays the strengths and vulnerabilities of allies and opponents. It provides opportunities to develop tactics that will pressure the decision-maker to support your campaign. By showing all of the decision-maker's relationships, the power analysis allows you to focus on specific influencers that you might otherwise ignore. This process bridges social and political connections.

In order to convince your decision-maker to side with your campaign, you need support. By completing a power map, you can see which people and organizations support your campaign, as well as those who don't. You can use the positive influencers directly while trying to change the opinions of those that are opposed. The more people or organizations that support your campaign, and the more influence they gain, the easier it will be to convince your decision-maker. You can also identify people in the community that may have strong interests in the

outcome, but don't currently have power, and determine if engaging those people will increase the power of the movement and influence over the decision-makers.

In addition, you can use a power map to plan how to increase the power of communities. Who are the communities most affected by the decisions? Which communities aren't being engaged in the decision-making process? How can your organizing help not only engage them, but also, if necessary, change the power structures to make it easier for them to have influence?

When thinking about increasing the power of the community, consider some of the following questions: Are



politicians not meeting with our partners? Could we include environmental justice or social justice organizations in our next meeting with the target? Are agencies holding hearings at times and places that are not accessible? Are the materials only in English? Is there no childcare? Can we advocate for public hearings that would more adequately engage low-income communities, communities of color, seniors, students, non-English speakers, etc.?

As an organization committed to contributing to the power of a larger movement, the Sierra Club has an essential role to advocate with decision-makers for improvements to the decision-making process to enable underserved communities to be heard.

Who Are You Mapping?

- In the mapping process, focus on primary targets first. The primary target is the individual whose decision can result in the campaign achieving an outcome. As a general rule, because of the nature of their role in our democratic system of government, elected officials make the best targets, followed by appointed government officials, followed by private individuals (e.g., corporate CEOs).

- The next level of influencers is called a secondary target. These people may have close relationships with the decision-maker: coworkers, friends, professional peers, constituents, campaign donors, etc. These are almost as important as the primary target, as they can persuade him or her in any direction. Roman Emperor Constantine the Great abolished Christian persecution largely because his mother was a Christian.

Depending on your available time and resources, you may want to also conduct power maps on a deeper level of individuals:

- The next level of influencers is the **grasstops**. "Grasstops" refer to community leaders and influencers, while community members are the "grass-roots." Your own leadership group or organization is likely to include individuals with broad influence in the community, so don't overlook them!
- Next, we have **allies of the decision-maker**, both existing and potential.
- Finally, there are the **opponents** to the campaign. It's helpful to know who is against your campaign and why.

PREPARING FOR YOUR POWER MAPPING SESSION

By now, it is probably clear how important the community mapping process will be to constructing your power map. To the context provided by your community map, you can now add research done on your target. Understand the relationships he or she has, and how you can work those relationships to your advantage. In addition to an online search, ask around the community and network around your decision-maker. Find information from all sources.

Be strategic: How does this help us win now, as well as shift power relationships for the longer fight ahead?

Be creative: Remember to think outside the immediate decision-making context. An elected official will be as influenced (or more influenced) by a good friend or community leader as they are by their legislative colleagues.

Be thorough: Do your research and refer frequently to your community map.

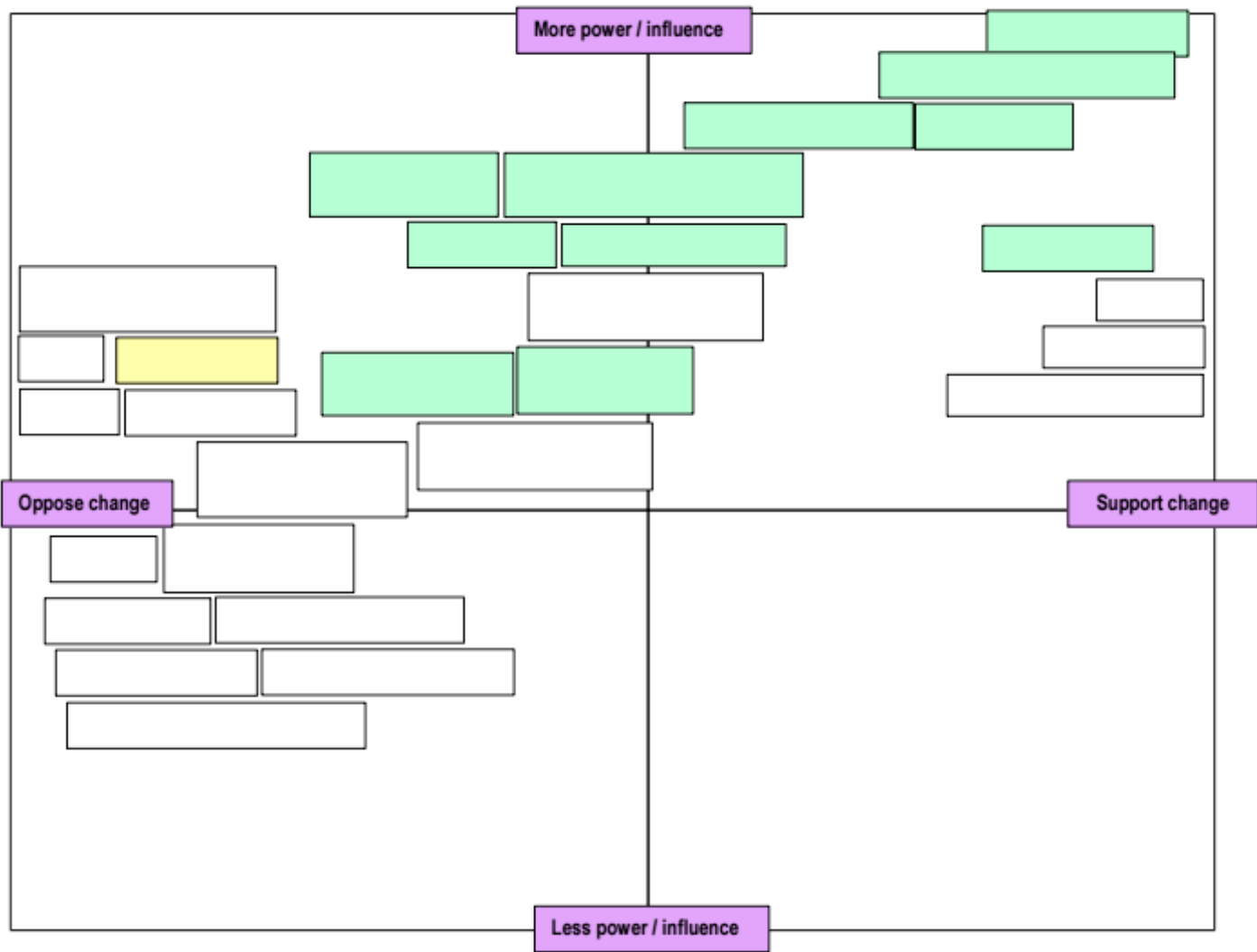
Making Your Power Map

Power mapping is best done as a group process. Before you make your power map, clearly identify the campaign goals and the target decision-maker. Create intersecting vertical and horizontal axes. The vertical axis shows the influence an individual or group has on decision-making. Points higher on the axis reflect stronger influence, and lower on the axis reflect weaker

influence. The horizontal axis shows the level of support or opposition an individual or group has towards the campaign. A position further right on the axis reflects strong support, while further left reflects strong opposition. Place your target decision-maker at the top of the graph and start positioning the influencers accordingly. This enables you to visualize the relationships between the decision-maker and the influencers, and use them to your advantage.

Using Your Power Map to Stay on Target

Use the power map information in your campaign planning, and update it regularly based on a quarterly review. If any influencers change their opinions in favor of your campaign, understand the reasons why and learn from them. Identify benchmarks and choose indicators that will help you measure changes in your decision-maker's thinking (e.g., endorsement, sign-on to letter, agree to vote in support, decision-making delays, additional study, switch to alternatives, etc.).



TO PROTECT OUR ENVIRONMENT, WE MUST PROTECT OUR DEMOCRACY

By Heather McGhee and Courtney Hight

Introduction

The science says it, the public knows it, and the future demands it: We need to act now to tackle the climate crisis. But to win on climate, it will take more than just a moral obligation—it will take a broad, inclusive, and effective movement that points to the need to act, while highlighting the powerful opportunities we'll seize when we do. That is how we will translate the scientific data and public opinion that are solidly on our side into powerful policies that will help build a thriving, clean energy economy.

The Sierra Club and our allies are building the broad movement required to bring about a just transition to clean, renewable energy. There are many obstacles, but a core problem that is threatening the success of the climate movement is an increasingly dysfunctional, distorted political system that results in skewed outcomes not in line with the public interest.

Large corporations, and the handful of individuals who most profit from them, are fueling this dysfunction— affecting local, state, and federal governments. Many of the same corporations polluting our environment are led by individuals who are polluting our democracy. Having discovered that public opinion is not on their side, they work with allied politicians and lawyers to change the rules in favor of their agenda.

As organizers, we are successful when decision-makers are responsive to public demands for action. But, our jobs as organizers become harder when the levers of power are accessible only to a privileged few. And that's what the surge of corporate polluter money and the widespread attacks on voting rights are doing to our democracy—shutting out more of the people who are fighting for clean air, clean water, and clean energy.

Restrictions on voting rights are sidelining critical leaders in our movement—the people who are on the frontlines of the fight for environmental justice—by targeting and disenfranchising low-income families and people of color, those who are more likely to face toxic threats in their neighborhoods and the most extreme effects of climate disruption on a daily basis. Big, individual donors like the Koch brothers have billions to gain by limiting the voices of people who have the most to gain from a clean energy economy.

The climate movement will become more powerful and effective by ensuring that those who need to be heard have access to the channels of power, that our democ-

racy is equitable and accountable, and that the voices of the polluters are never louder than the voices of the people. That work will also connect the climate movement with the other big issues facing our allies, including racial justice for communities of color, and stalled economic mobility for working families.

That's why the Sierra Club, Demos, and other allies are a part of a broad coalition to get big money out of politics, get more voters into our system, and build a movement for a government that is truly of, by, and for all the people.

THE DECK IS STACKED AGAINST THE MANY AND IN FAVOR OF THE MONEY

In the United States, the deck is stacked against ordinary citizens and in favor of large corporations and the ultra-wealthy “1 percent of the 1 percent.” Business interests, such as oil companies and the U.S. Chamber of Commerce, pursue agendas that are largely disconnected from the priorities and concerns of average Americans. Economic elites have very different policy preferences and priorities than the rest of us, especially on the role government should play in shaping a fair economy³⁵ and addressing climate disruption.³⁶

In studying thousands of policy outcomes, Princeton scholar Martin Gilens found that elected officials are responsive to the affluent, but that “under most circumstances, the preferences of the vast majority of Americans appear to have essentially no impact on which policies the government does or doesn't adopt.”³⁷ Gilens and a colleague concluded that “[i]n the United States... the majority does not rule—at least in the causal sense of actually determining policy outcomes.”³⁸

This tilted influence has real-world effects. Corporate and capital gains taxes have been reduced, while the federal minimum wage remains stagnant and millions of workers lack paid sick leave, shaping an economy where more of the gains go to the wealthy, while millions of working families struggle to stay afloat. Congress protects subsidies for polluters, but fails to protect families from the dangerous effects of climate disruption. People of color, in particular, are underrepresented: Their con-

35 David Callahan and J. Mijin Cha, “Stacked Deck: How the Dominance of Politics by the Affluent & Business Undermines Economic Mobility in America,” *DBmos.org* (2013), <http://www.demos.org/stacked-deck-how-dominance-politics-affluent-business-undermines-economic-mobility-america>.

36 Benjamin Page, Larry Bartels and Jason Seawright, “Democracy and the Policy Preferences of Wealthy Americans,” *Perspectives on Politics*, Volume 11, Issue 01, March 2013, 51-73. DOI: <http://dx.doi.org/10.1017/S153759271200360X>.

37 Martin Gilens, *Affluence and Influence: Economic Inequality and Political Power in America* (Princeton University Press; Reprint edition, 2014), 81.

38 Martin Gilens and Benjamin I. Page, “Testing Theories of American Politics: Elites, Interest Groups, and Average Citizens,” *Perspectives on Politics*, https://scholar.princeton.edu/sites/default/files/mgilens/files/gilens_and_page_2014_testing_theories_of_american_politics.doc.pdf.

cerns are marginalized, and they often end up living in the communities most affected by toxic pollution and climate disruption.

Undue Influence of Money on Our Political System

Money and politics have a long connection, but a series of Supreme Court decisions in recent decades has dramatically boosted the role of money, turning it into a fundamental threat to our democracy. This started in 1976, when the Court struck key provisions of Congress's post-Watergate campaign reforms. Two recent rulings, *Citizens United v. FEC* (2010) and *McCutcheon v. FEC* (2014), which was brought by Alabama coal executive and climate-denier Shaun McCutcheon, have opened the door to unlimited outside spending by wealthy individuals and corporations, and shifted the balance of power in candidate fundraising even more sharply towards the "1 percent" and away from ordinary citizens. In the 2012 presidential election, immediately following the *Citizens United* decision, outside spending by big polluters spiked by more than **11,000 percent** over the 2008 election.³⁹

Attacks on the Right to Vote

The same elected officials who were brought to office backed by big money are also narrowing the scope of "who counts" in America by passing laws that make it harder for low-income people, young people, and people of color to vote. Many of these attacks come at the state and municipal levels, where most election-related policies and laws are made. They come in many forms: cutting back on early voting, eliminating the opportunity to register and vote on the same day, rolling back the voting rights of formerly incarcerated citizens, and requiring certain forms of photo identification that students, the elderly, low-income Americans, and people of color are less likely to have. Many of these rollbacks are supported by the state-policy-focused American Legislative Exchange Council (ALEC) and its corporate funders.⁴⁰

SOLUTIONS TO PROTECT OUR DEMOCRACY

Distorted democracy hobbles the climate movement. Correcting our current political system's imbalances—and restoring the power of voters—opens the path for both a 100-percent clean energy future, and for an increasingly just and equitable future across a range of linked issues and interests. There are some specific steps we can take to restore our democracy:

1. Protect and Expand Voting Access

A vibrant, functioning democracy protects all citizens' freedom and access to vote. We can restore that expectation by shifting the burden of putting people on the voting rolls from individuals to the state. We already give the government all the information needed for voter registration when we sign up for a driver's license or public benefits, enroll at a public university, or get a permit to use a public park. States can use that information to automatically register people to vote. In 2015, both Oregon and California enacted opt-out voter registration for DMV customers. This is a good start, but a true automatic program must pull from a wider range of agencies, including those visited by people who cannot afford cars.

With automatic registration in place, Same Day Registration (SDR) can then serve as a failsafe for anyone who falls through the cracks. SDR allows citizens to register and vote at the same time. There is growing momentum behind the policy, and states that allow SDR average more than 10 percent higher voter turnout than states without it.⁴¹

We can also expand early voting. Lengthening the time when people can vote—and especially, offering a weekend option—can help narrow the race and class turnout gap.⁴² For example, in four out of five recent federal elections, African Americans used early voting more than whites in Florida.⁴³

While we need actions at the state and local levels, we also need stronger federal protections. The Voting Rights Act of 1965 protected vulnerable communities from discriminatory voting practices for nearly 50 years before it was gutted by the Supreme Court in 2013, and without its protection, citizens in states such as Texas, Virginia, and Florida have been disenfranchised. Within hours of the Supreme Court's decision, Texas state legislators passed an extremely obstructive voter restriction law that left an estimated 500,000 Texans without the required identification.⁴⁴ While facing many challenges for passage in a toxic political environment, Congress must act to restore a robust federal Voting Rights Act.

2. Raise All of Our Voices

One key strategy to put all voters, not just corporations and the ultra-wealthy, at the center of our democracy is to amplify the voices of ordinary citizens by providing "democracy vouchers," or matching small contributions to candidates or parties with public funds. Evidence suggests that matching programs and similar grant-based systems (in which candidates raise a threshold

39 "Polluting Our Democracy and Our Environment: Dirty Fuels Money in Politics," The Sierra Club and Oil Change International (2014), <http://www.sierraclub.org/sites/www.sierraclub.org/files/program/documents/Polluting%20Our%20Democracy%20And%20Our%20Environment%20Report.pdf>.

40 Center for Media and Democracy, "Voter ID Act Exposed," ALEC Exposed, http://www.alecexposed.org/wiki/Voter_ID_Act_Exposed.

41 "What is Same Day Registration? Where is it Available?" DBmos.org (2013), <http://www.demos.org/publication/what-same-day-registration-where-it-available>.

42 J. Mijin Cha and Liz Kennedy, "Millions to the Polls," DBmos.org (2014), <http://www.demos.org/millions-polls>.

43 J. Mijin Cha and Liz Kennedy, "Millions to the Polls," DBmos.org (2014), <http://www.demos.org/millions-polls>.

44 Ross Ramsey, "Analysis: A Missing Piece in the Voter ID Debate," *The Texas Tribune*, October 24, 2014, <http://www.texastribune.org/2014/10/24/analysis-missing-piece-voter-id-debate/>.

number of small contributions from local constituents and receive a lump-sum public grant) encourage a broader range of people to give, boosting participation by women and people of color.⁴⁵ For example, Seattle, Washington, enacted a first-in-the-nation voucher program on the 2015 ballot.

Public matching funds, grants, and incentives for small contributions can also change the way candidates run for office, allowing them to spend more time reaching out—and listening—to voters, and less time holding exclusive events for large donors. This helps make candidates more accountable to all voters once they are in office. In Connecticut, for example, critical progressive policies have passed since enacting a similar system.⁴⁶

3. Limit Big Money

We also need to prevent big money from drowning out our voices with unlimited spending. Supreme Court decisions have turned the First Amendment into a tool for use by wealthy donors to dominate the political process. In order to reign in big money, we'll have to restore the intent of our Constitution. There are two ways to do this.

First, we can transform the Supreme Court's approach to money in politics so the Court overturns its own bad decisions—just like the justices have reversed course on New Deal economic protections, racial segregation, gender- and sexual-identity civil rights, and more. Alternatively, we can amend the Constitution to clarify that the people have the right to enact limits on big money. As of 2015, 16 states, more than 600 municipalities, and a majority of the U.S. Senate had called for such an amendment.

Either solution would help to level the playing field for candidates, and for working- and middle-class voters. Those who aspire to public service could spend less time raising money from a handful of wealthy, mostly white donors, and more time reaching out to all voters regardless of race, gender, or class.

CONCLUSION

A strong democracy is critical for the long-term success of the climate movement. As we push back against wealthy elites who are trying to buy control of our country, our movement simultaneously moves closer to a just and equitable clean energy system. Together, we can demand a system where everyone has an equal say in our democracy, and our elected officials work for the 99 percent.

⁴⁵ Miles Rapoport and J. Mijin Cha, "Fresh Start: The Impact of Public Campaign Financing in Connecticut," *DBmos.org* (2013), <http://www.demos.org/publication/fresh-start-impact-public-campaign-financing-connecticut>; Elizabeth Genn et. al., *Donor Diversity through Public Matching Funds*, Brennan Center for Justice & Campaign Finance Institute (2012).

⁴⁶ Miles Rapoport and J. Mijin Cha, "Fresh Start: The Impact of Public Campaign Financing in Connecticut," *DBmos.org* (2013), <http://www.demos.org/publication/fresh-start-impact-public-campaign-financing-connecticut>.

What does it look like to build a movement that connects these issues? North Carolina is one place where people have successfully broken down "issue silos" and worked collectively to build a stronger democracy. Between 2010 and 2012, the wealthy, conservative activist Art Pope and his allies used their outsized influence to help far-right Republicans take control of the state legislature and the governor's mansion. The legislature quickly began rolling back laws around public health and the environment, public schools, taxes, and labor, while simultaneously passing some of the most restrictive voting laws in the nation.

The Institute for Southern Studies, Democracy North Carolina, NC Voters for Clean Elections, NAACP, and Common Cause joined with environmental, labor, civil rights, and student groups to push Art Pope into the national spotlight and raise awareness of his network and agenda. They began the Moral Mondays movement, engaging in civil disobedience on each Monday of the legislative session.

Reverend William Barber, head of the NAACP in North Carolina, explained:

"We in the NAACP [in North Carolina] asked, why are all the advocacy groups fighting separately on the issues? Why don't we find a way to come together? [W]e went down the voting list and found the same people that were voting against environmentalists were voting against public education, voting against labor rights. And the question was if they were mean enough to be together, why weren't we smart enough to be together?"⁴⁷

As the resistance grew, Communications Workers of America (CWA) workers and other allies were arrested alongside NAACP members, the Sierra Club helped organize solidarity rallies, and Greenpeace provided civil disobedience support. These actions in North Carolina drew national attention, and the Moral Mondays movement expanded into Georgia, Indiana, Missouri, Florida, and other states.

There are other examples of people crossing traditional divides to build a stronger democracy:

- TakeAction Minnesota brought together community groups, labor unions, and their own strong base in communities of color to defeat a voter restriction ballot measure that was once considered a "slam dunk."⁴⁸

⁴⁷ Amos Brown, "Rev. William Barber II explains need for Moral Mondays," *Indianapolis Recorder*, September 25, 2014, http://www.indianapolisrecorder.com/news/article_aec9c472-44d0-11e4-a01c-d376bfc70954.html.

⁴⁸ Adam Lioz, "Stacked Deck: How the Racial Bias in Our Big Money Political System Undermines Our Democracy and Our Economy," *DBmos.org* (2014), <http://www.demos.org/publication/>.

- After Connecticut enacted a “fair elections” system that brought more women and people of color into the legislature, it became the first state to guarantee paid sick leave.⁴⁹
- In Maine, environmental, labor, civil rights, and economic justice groups came together to strengthen the state’s clean elections law, helping return Maine’s elections to the people in the wake of Citizens United.

This type of crosscutting movement to build a stronger democracy can happen in every state. The Sierra Club has teamed up with Demos, the Communications Workers of America, NAACP, Greenpeace, Common Cause, the AFL-CIO, and others—more than 55 national, issue-based organizations and labor unions all

stacked-deck-how-bias-our-big-money-political-system-undermines-racial-equity

49 J. Mijin Cha and Miles Rappaport, “Fresh Start: The Impact of Public Campaign Financing in Connecticut,” DBmos.org (2013), <http://www.demos.org/publication/fresh-start-impact-public-campaign-financing-connecticut>

together—to establish the network needed to create the democracy we seek.

Under the banner of the Democracy Initiative, we are bringing together issue-based organizations and hundreds of thousands of active volunteers around the country to change the public debate, and to broaden the voices working to fix our democracy at the local, state, and national levels. The partnerships we are building are the same partnerships needed to build a strong climate movement, so this work is not separate. Together, we can win. As past movements have proven: Organized people will beat big money.

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CHAPTER 7:

BUILDING

A BASE

CHAPTER GOALS

- Identify how a base-building plan is a critical element of an overall campaign strategy.
- Identify how base-building increases both internal and community capacity to influence decision-makers.
- Help you to create base-building goals that will influence targets based on power analysis and community mapping analysis.
- Identify the steps and time needed to develop a plan to build a base of support for your campaign.
- Help you connect early base-building work to a larger, six-month tactical plan that will continue to expand your base.

So far, we have been describing elements of preparation and research that enable us to build a campaign plan that reflects community interests, and is strategic in its approach to outcomes, power considerations and targets. Now it's time to add the most important ingredient of our work as organizers. People are the fundamental currency of our trade, and our success in engaging people broadly and deeply in our campaign is the single most important determinant of our success in achieving outcomes, building sustained power, and contributing to the larger movement.

DEVELOPING YOUR CAMPAIGN: BUILDING THE POWER OF THE PEOPLE

By this point, you know what you want your campaign to achieve in the world and how to begin doing it. In addition, you have analyzed the influences over and with the target, as well as the needs, interests, and existing and potential resources of the community.

At this stage, it may seem like a good idea to start talking with decision-makers and letting them know what you want to see from them. On occasion, that can be enough—presenting your information, concern, and expressed hope—but most often, it is not. Even when it works, you may have only gained a champion, and that person will have work to do to overcome the opposition to your idea (which implies a change in campaign target).

This is why base-building is the next critical step to a successful campaign.

UNDERSTANDING BASE-BUILDING FOR ISSUE CAMPAIGNS

Base-building is a term often used in electoral campaigns to refer to a group of voters who are going to vote for a candidate. The goal is to turn out a specific percentage of the existing “base” of voters who support the candidate, as well as a requisite number of undecided voters, to get to the target number of voters needed to win. The target number (base + undecided) is established in the context of the number of registered voters, and can reliably be used as a goal to plan efforts and to win a campaign.

With issue campaigns, it's harder to determine the exact “people-power” formula that will help you to plan and implement your campaign. Your power mapping process, however, will provide essential information.

To help further hone-in on what sort of base-building we want to do, the Sierra Club has identified four elements that contribute to a “show of power” that will make a difference to a decision-maker.

These four elements are:

Depth: The depth of a campaign is measured by the number of leaders and activists that are engaged. These leaders should represent a diverse set of perspectives that connect to the community. For example, they might be representatives of local youth groups, a parent from an affected school, long-standing environmental leaders, and frontline community members. A campaign with a deep bench of leaders representing diverse perspectives and backgrounds is a strong campaign. We'll discuss leadership and leader development in greater detail in later chapters.

Breadth: The breadth of a campaign is measured in terms of supporters who have taken at least one action to demonstrate that an issue is important to them. These actions can range from less personal (e.g., emails to legislators) to more personal and creative, such as video stories from community members recorded at community events.

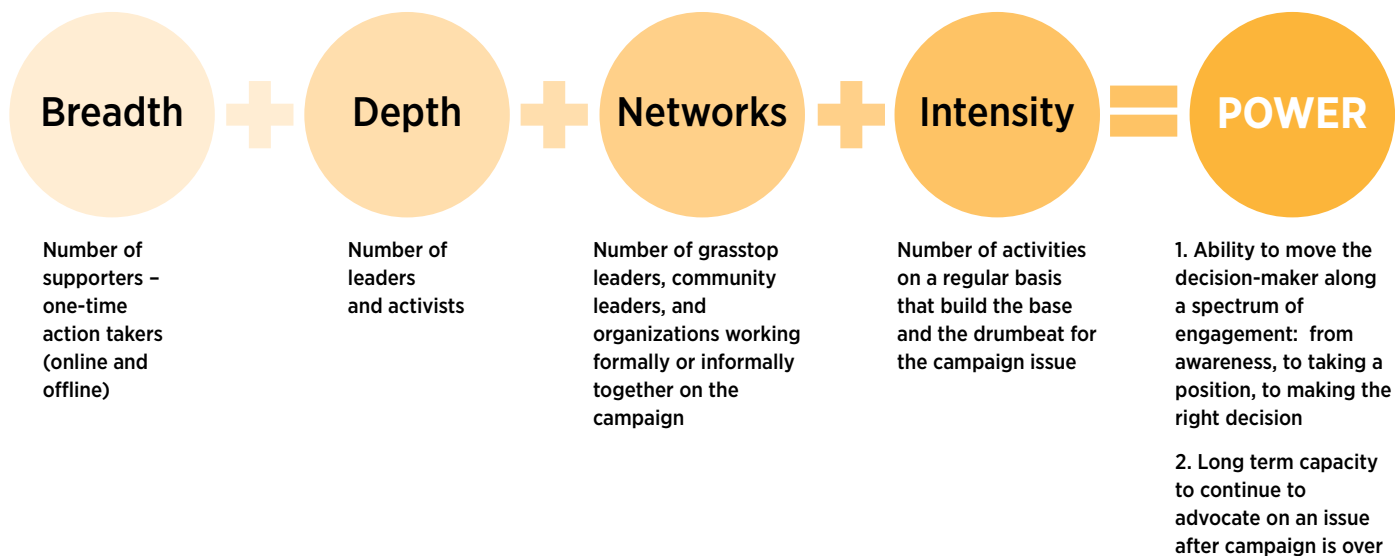
Network: The network of a campaign is measured in terms of grassroots leaders and organizations that have indicated support for—or contributed resources to—the campaign. Sometimes a formal coalition or informal working group comes together around an issue campaign. Other times, there is more of a loose understanding of shared interest in a particular issue.

We can measure the way a network demonstrates their shared interest to decision-makers through a variety of tactics, such as a signed letter to decision-makers from network leaders, joint planning of events, or shared effort in managing the campaign. This network is strongest when there are true partnerships and not just transactional relationships. Inviting organizations to the table early and understanding shared values and goals help us to create strong partnerships.

Intensity: The intensity of a campaign is measured by the regularity of activities as well as growth in size over time. When creating your campaign plan, include tactics that invite new people and organizations to join the campaign across the entire timeline. Regular gatherings and activities like tabling events help to grow the base as well as engage existing leaders. Tactics that take place in a variety of venues to reach existing and new supporters are helpful to keep and build momentum. Ideally, events build upon one another, so that participants in an early, smaller activity are helping to coordinate the next, larger activity.

Power: In this context, we are measuring power in two distinct ways, 1) power to move our target, and 2) long-term power to build our movement.

Our power to move the target to decide in favor of our campaign outcome can be measured through mile-



stones. The start of this journey is our target’s awareness of the issue. Then come the announcements of a position on the issue, followed by public forums for discussion, key votes on an issue, and finally, giving us what we want: campaign victory. Plan a series of interactions with the target to measure shifts in opinion over time, as you ramp up the pressure and build more public support for your campaign.

Long-term, movement-building power is assessed by the growing strength of our partners to wield influence, the sustained capacity of our leaders to be agents of change in their community, and the appetite and interest of the network to collaborate on future campaigns.

HOW TO BUILD YOUR BASE

There are three distinct phases of a campaign:

1. Developing leadership and resources
2. Building a constituency to start putting pressure on your target
3. Expanding constituency and escalating pressure on your target

Each phase has unique circumstances and focus. We have provided an outline here of what to expect in each phase.

PHASE 1: DEVELOPING LEADERSHIP AND RESOURCES

Before you start to reach out and find new resources, you have to know what you already have. You should:

- Understand where you are going to be organizing.
- Understand how many members and supporters you have in a location (breadth).
- Understand how many active members and supporters you have in a location.
- Estimate how many people you will need to en-

gage to influence your target (this can be a mixture based on how many votes the target won by and how many people it takes to garner press).

- Identify your decision-maker, the venue where the decisions will be made, and the timeline on which they will be made.
- Power-map your decision-maker (understanding who moves your decision-maker and what sort of networks you need to engage).
- Community-map the area where you will be organizing (understanding who is in the community, what networks you need to engage, and any historical, geographic, and/or racial tensions).

Now it is time to start talking to people—have one-on-ones with potential leaders and organizations to listen to them and understand their values, their take on the issue and the decision-maker, and what sort of tactics are within their comfort zone, and see if they want to be part of the campaign. During these early conversations, it’s important to ask who else should be involved and evaluate who is not at the table. By being conscious and intentional in this process, you can create room for diverse partnerships.

Next, have an initial team meeting with those who want to be part of your campaign. This team meeting is an opportunity for folks to learn more about the campaign, and connect with the issue and each other. During the meeting, the team can also identify who else needs to be involved (both individuals and organizations).

Some campaigns utilize different base-building tools during this phase, including:

Petitions: Petitions are good tools, since they go to the decision-maker and identify a person as a supporter. Petitions can be used both online and offline to build breadth of support. A good action for a potential leader

TRANSACTIONAL VERSUS TRANSFORMATIONAL

This distinction is vital for the organizer when thinking about relationships—with activists, team members, partner organizations and others.

Transactional relationships are based in *quid pro quo*, or “this for that.” At best, transactional relationships are a balance of distinct interests between the parties. Often, one party presumes a common interest that does not exist, and is likely to alienate the other as a result.

Transformational relationships are based in an expectation of learning, growth, and change as a result of working together. They are based on trust and openness. As a rule, they are slower to develop, stronger, and more durable than transactional relationships.

You’ll recognize that this manual is strongly biased toward the value of transformational relationships.

We are committed to transformational relationships as a fundamental building block to becoming a more diverse, equitable, and inclusive organization that contributes to a larger movement and cultivates strong leadership.

to take is to collect petitions from their own networks or at a community event. Petitioning in different geographic areas can help to bring in a more diverse base of support.

House parties or meetings: These are great events to hold either in people’s homes or at a local community center, restaurant, or library. People gather to connect to the campaign and each other. It is a great opportunity for leaders to reach out to their networks, helping to develop depth and breadth of support and to expand networks.

Outings: The Sierra Club has a long and rich history of leading outdoor activities as a means to connect people with one another and with the places they seek to protect. Outings can add a unique social and psychological dimension to your base-building efforts. An outing can take place in a state park or in an urban neighborhood. It can be an opportunity to share personal narratives, a chance to perform service work, or a means to connect your base to the outcome you seek (e.g., a tour of a wind farm).

Presentations: Working with leaders to deliver presentations about the campaign to organizations, including parents’ groups, community groups, and neighborhood associations, is a great way to expand the networks and breadth of the campaign. Before presenting to the group, gain an understanding of their norms and language so you are meeting them on their level.

As your campaign plan unfolds, emerging leaders and organizations around the table can decide which of these tactics to take on and how long they want to engage before launching into phase two. This phase correlates to the first big peak event of the campaign, such as delivering petitions or having a campaign launch press conference or rally. It is the first demonstration of power to the decision-maker.

PHASE 2: BUILDING A CONSTITUENCY TO START PUTTING PRESSURE ON YOUR TARGET

Sometimes you and your campaign team are in control of when key peak tactics will occur in your campaign. Other times, it is dictated by the venue. For example, if you are working to pass a piece of legislation, there will be specific dates beyond your control, such as the date a bill has to be introduced, a committee hearing has to take place, or a session wraps up. Other times, like in a fight to retire a coal plant, there are no fixed

dates and your team gets to decide when to move into action. You and your team should identify the key dates for your campaign and work backwards from there to develop the breadth, depth, and networks needed to dominate that venue. Some tactics you can use during this phase include rallies, letters to the editor, social media “days of action,” and petition deliveries. Be sure

GIRLTREK

(www.girltrek.org) is an organization that places outings at the very center of their mission to: “Pioneer a health movement for African American women and girls grounded in civil rights history and principles through walking campaigns, community leadership, and health advocacy.”

to identify the leadership opportunities within each of these types of action, and have the action(s) decided upon and owned by the leadership team.

PHASE 3: EXPANDING YOUR CONSTITUENCY AND ESCALATING PRESSURE ON YOUR TARGET

As you get to this last phase, it is important to recognize that the decision-maker's reaction to your campaign tactics should determine intensity of the next action. Targets tend to first ignore campaign efforts, then respond and discredit them, and finally, get to a "yes." At first, space out your campaign actions so you have time to continue to do one-on-ones and build relationships. As the target acknowledges what you are doing (and possibly discredits it), you build up intensity. By the end of your campaign, you should have enough breadth, depth, and networks that you are able to sustain intensity until you get your target to say "yes."

Be proactive in setting your own campaign goals and timeline, organizing your tactics so that they build capacity and momentum over time. The timing of a campaign is structured like an unfolding narrative or story: It begins with a foundational period (prologue), starts crisply with a kick-off (the curtain goes up), builds slowly to successive peaks (Act one, Act two, etc.), culminates in a final peak determining the outcome (denouement), and is resolved as we celebrate the outcome (epilogue). Our efforts generate momentum not mysteriously, but by building it up like a snowball.

- Identify tactics and timeline to engage new people and pressure your target. Work backwards from key strategic opportunities.
- List critical decisions or pressure points related to your strategy.
- Determine which of these critical decisions require demonstration of power AND will resonate with people.
- Look for gaps in intensity, and identify proactive tactics to engage people and pressure the target.
- Build in campaign leadership development events: build relationships, provide skills, and identify next steps.

BASE-BUILDING IN ACTION: BEYOND COAL

The Indianapolis Beyond Coal campaign kicked off in the fall of 2012 and by August 2014, they had achieved their goal to retire the Harding Street coal plant. They kept up their relationships and connections, and in August 2015, two hundred people rallied at the State House to celebrate the finalization of the Clean Power Plan. Here is how they did it:

Phase 1: Development of Leadership and Resources

The organizer started in August 2012 by holding one-on-ones with potential volunteers and people from organizations that were interested in getting involved in the campaign. By September, after an initial team meeting, the organizer had launched a petition to the decision-maker, Ken Flora, the CEO of Indianapolis Power and Light, and started to identify potential leaders who then enabled others to sign the petition. In November, 30 people from three organizations delivered 2,000 petitions to the decision-maker.

Phase 2: Building a Constituency and Putting Pressure on the Target

The Indianapolis Beyond Coal campaign realized from the beginning that to win in Indiana, they were going to need more than just environmentalists. The faith community had been a big part of the kick-off effort, and the organizer worked with them to deepen their relationship to the campaign and expand their networks. Some five months after the petition delivery in April 2013, at the time of an important regulatory hearing, eight faith leaders organized 40 people to hold a faith walk. This event gained media attention and added legitimacy to the campaign, since it delivered the message from new voices. Two months later, the next big campaign peak occurred. The Sierra Club leaders and allies held a rally where 12 leaders turned out 150 people to spell out "Beyond Coal." The campaign showed the decision-maker that they were bigger, stronger, and more diverse than ever.

The Indianapolis Star, the most widely read paper in the state, ran a big story on the campaign. The pressure wasn't just felt in Indianapolis; the head of a different utility called the chapter chair and asked if they were going to do something similar in its service territory.

Phase 3: Expanding the Constituency and Escalating Pressure on the Target

Some 10 months later, after an intensive period of base-building and increasing intensity with tools like billboards, letters to the editor, and paid advertisements, it was time to launch a resolution campaign. Organizations throughout the city called on Indianapolis Power and Light to phase out their coal plant by 2020. Roughly 200 people from 30 organizations, including students, neighborhoods groups, the NAACP, and others, gathered for a rally at Monument Circle. This event allowed the diverse voices in the coalition to speak for themselves, and tell their own stories as to why they didn't want this coal plant in their city.

This peak event was followed a month later by a packed committee hearing—about 200 people showed up. Meanwhile, activists all around the city were having their own mini-events where they delivered postcards to city

and county councilmembers. Their “breadth + depth + networks + intensity” delivered enough power to win. In August 2014, Indianapolis Power and Light announced that they would cease burning coal at the Harding Street coal plant by 2016.

The postscript of this story is even more exciting: Many of the organizations and relationships who came together to win this campaign are still actively working to make sure that Clean Power is implemented in a strong and just way in Indiana.

Creating space for diversity, equity, and inclusion was a conscious effort on the part of the organizer and the team. During each phase of the campaign, the team reflected on who was missing, and how they could form deeper and more trusting relationships. The NAACP and the faith community were key partners in the campaign, bringing in new and more diverse partnerships from their own networks. Allowing these groups to speak in their own voices at rallies and to the media highlighted this diversity, and built trust with the organizations.

EXERCISE: DISSECT A BASE-BUILDING PLAN

The example that follows is an actual plan developed by a campaign team and organizers. Read through it and identify key base-building activities. How does this timeline demonstrate tactics that accumulate and build power at each step? How are ranges of tactics used that complement one another? See if you can identify the phase of base-building this example details.

NATIONAL ADVOCACY CAMPAIGN: BEYOND COAL TO CLEAN ENERGY

STATEWIDE ADVOCACY CAMPAIGN: Retire Sherco Coal Plant (Minnesota)

All leading up to October hearing in front of Public Utilities Commission (PUC)

- Online petition action to PUC: 7/20 – 8/11
- Offline petitions being collected: 6/1 – 8/11 (submitted 8/12)
 - Petition captains ask individuals to sign up to collect petitions
 - Record who signs up, who follows through collecting petitions
- Summer outreach events to collect petitions (multiple events in multiple locations, 6/1 – 8/10)
 - Summer Outreach Training: 6/20 Minneapolis
 - Summer Outreach Training: 6/27 St. Cloud
 - Dragon Festival Table: 7/8
 - Midtown Market Table: 7/19
 - Etc.
 - Record actions: participants, coordinators, and petition signers
- Summer volunteer potluck: 8/30
 - Record RSVPs (online invite), coordinators, attendees, LTE writers
- Letter to the Editor (ongoing): online, follow up with online action-takers and ask them to write an LTE
 - Record who agreed to submit LTE, who actually submitted LTE, how many LTEs printed?
- October 10/15 Hearing
 - Event planning team
 - Record event-planning team's weekly meetings (including strategic partners)
 - Recruit folks for event
 - Online invitation with RSVP for hearing
 - Record RSVPs: who will attend and who is signing up to speak
 - Facebook ads, etc. to boost RSVPs
 - Phone bank events to recruit: 9/23, 9/26, and 10/14
 - Record actions for phone bank leaders & participants and phone bank responses (yes/no/maybe/etc.)
 - Record recruitment for phone banks: volunteer actions, responses (yes/no/maybe)
 - Partner organization hosting phone bank: 10/13
 - Record partner action + Sierra Club volunteer participants
 - Trainings
 - Trainings for hearing speakers: 10/5 & 10/6 (Minneapolis & St. Cloud)
 - Record coordinators (trainers) & participants
 - Actual Hearing
 - Record attendees (participants), volunteer leaders, hearing speakers (will overlap), grass-tops & partner speakers
- Volunteer Appreciation Event: 11/1
 - Pull list of everyone who has taken any action on this campaign and invite them to the appreciation event
 - Record coordinators, participants (includes grasstops, partners)

DIVERSITY, EQUITY, AND INCLUSION: BUILDING A JUST ENVIRONMENTAL MOVEMENT

By Allison Chin and Tony DeFalco

INTRODUCTION

The United States is at a demographic, economic, and environmental crossroads. Leaders and organizers engage under conditions of globalization, increased stress on the environment, accelerated speed and dissemination of information, rapidly shifting demographics, unprecedented complexity, growing interdependence, and an ever-widening gap between economic and environmental “haves” and “have-nots.” How the Sierra Club embraces these challenges and opportunities will determine how we create an economy that delivers for all, and how we save a planet threatened by inequitable consumption.

By the mid-2040s, the United States will be a majority-minority country. One projection estimates that people of color will make up 50.3 percent of the population (with 25 percent Latino, 12.7 percent African American, 7.9 percent Asian, 3.7 percent multiracial persons, and 1 percent other ethnicities), compared with whites at 49.7 percent of the population.⁵⁰ Four states—Hawaii, California, New Mexico, and Texas—along with Washington, D.C., currently have majority-minority populations.⁵¹ The population of the Millennial generation (approximately 83 million) has already surpassed the Baby Boomers (approximately 75 million) and is the most diverse generation in U.S. history.⁵² This demographic shift will replace the 75 million aging Baby Boomers with a new wave of workers—and potential volunteers!—who are mostly people of color.

We live in a time when human society and technology are increasing the pace and rate of environmental change in unprecedented ways. The injustices of climate disruption, and the pollution that drives it, disproportionately affect the most vulnerable communities—primarily those of low-income people and people of color. Moreover, communities of color are at the tip of the spear when it comes to the effects of pollution. More than 60 percent of African Americans and Latinos live within 30 miles of a toxic coal plant. Among residents

living within 3 miles of a coal-fired power plant, 39 percent are people of color (a figure that is higher than the 36-percent proportion of people of color in the total U.S. population).⁵³ Pollutants from coal plants don't just exacerbate climate disruption, they lead to a host of illnesses, including increased rates of asthma and cancer, and 13,000 premature deaths each year.⁵⁴

The dual urgency of climate disruption and poverty demands that we change everything—wean ourselves off of dirty fuels, slash pollution, accelerate the clean energy revolution, protect natural resources and corridors, and create millions of jobs—to put us on a path to a sustainable future for generations to come. To achieve such ambitious goals will require an environmental movement that engages the full spectrum of society.

In a nation where no one group will be a majority, we must forge robust collaborations, alliances, and partnerships with a diverse group of contributors and articulate a vision for a fairer, more just, and more productive society. Leaders and organizers will have to understand race, and incorporate social justice into environmental protection efforts to generate solutions that create benefits for all. Past environmental protection efforts have largely failed to incorporate social justice and as a result, have not benefited low-income people and people of color. Our power is strengthened through reciprocal relationships across differences and mutually beneficial work, in particular with low-income people and people of color.

A more diverse America is an inevitable outcome; a more just America requires a more inclusive approach to environmental advocacy.

“A more diverse America is an inevitable outcome; a more just America requires a more inclusive approach to environmental advocacy.”

⁵⁰ William H. Frey, “New Projections Point to a Majority Minority Nation in 2044,” Brookings.edu, December 12, 2014 (last accessed November 5, 2015), <http://www.brookings.edu/blogs/the-avenue/posts/2014/12/12-majority-minority-nation-2044-frey>.

⁵¹ Angela Glover Blackwell, Stewart Kwoh, and Manuel Pastor, *Uncommon Common Ground: Race and America's Future* (W. W. Norton & Company, 2010).

⁵² Josh Sanburn, “U.S. Steps Closer to a Future Where Minorities Are the Majority,” *TIME*, June 25, 2015, <http://time.com/3934092/us-population-diversity-census/>.

⁵³ NAACP, et al., “Coal Blooded: Putting Profits Before People,” November 15, 2012, <http://action.naacp.org/page/-/Coal%20Blooded%20Report%2011.15.2012.pdf>.

⁵⁴ See: <http://www.potomacrivergreen.org/wp-content/uploads/2016/01/toxic-air-report.pdf>.

HISTORICAL CONTEXT: ENVIRONMENTAL RACISM

Traditional narratives of conservation and environmental protection whitewash a history of exclusion of women, low-income people, and people of color from leadership, the enactment of policies that displaced Native peoples from their ancestral lands, and a consistent disregard for the priorities of working people. A failure to reckon with this history puts us at risk of repeating the mistakes of the past and provides no insight into how we should grapple with new realities.

Even as we acknowledge the oppression manifest in all of the “-isms,” racial and ethnic disparities are the most significant in the U.S. today. Across nearly all indicators of health and well-being, people of color lag significantly behind whites. The social construction of race was utilized by whites to dispossess Native peoples of their land, enslave Africans, and exploit Asian and Mexican laborers. These race-based outcomes form the basis of the taking and growing of this country—from the first landing of Europeans through conquest, slavery, exclusion laws, internment, ongoing disparities, and internalized oppression. Within our country’s current power structures, race is still the major fault line.

Environmental racism occurs when privilege for a socially dominant group is exercised and non-dominant minorities are mistreated. The effect of these privileges and prejudices can be manifested in many ways, including displacement of people from their homeland, siting of highly polluting sites in minority-populated areas, and development of policies that burden certain communities disproportionately.

- Early 19th-century conservation practices were exclusionary, displacing indigenous people to “protect” nature and set it aside for recreation and scientific study. California state militia expelled the Ahwahneechee tribes from Yosemite, and the U.S. Army kept indigenous peoples and others out of Yellowstone from 1886 to 1918 with the threat of violence. In his book, *Crimes Against Nature*, Karl Jacoby draws on examples from the Adirondacks, the Grand Canyon, and Yellowstone to demonstrate

the history of displacement in this country.⁵⁵

- Major environmental statutes, such as the Clean Air Act and the Clean Water Act, were written without acknowledging the unequal vulnerability of the poor and of minority groups.⁵⁶
- Toxic-waste-producing facilities and toxic-waste-disposal facilities are disproportionately sited in communities of color. For example, “Cancer Alley” is an 85-mile stretch of the Mississippi River between Baton Rouge and New Orleans, Louisiana, with high industrial and petrochemical pollution and increased cancer risks. The entire population of this region (predominantly African American) has been exposed to thousands of toxic chemicals and very little has been done to clean it up.⁵⁷
- Native Americans have long suffered abuses from uranium mining. Churchrock, New Mexico, was home to the longest continuous uranium-mining operation in Navajo territory. Miners significantly depleted the limited water supply and contaminated the remaining water supply with uranium. The two largest mining companies, Kerr-McGee and United Nuclear Corporation, maintained that Native American land was not subject to environmental protections. The courts did not force them to comply with U.S. clean water regulations until 1980.⁵⁸
- Latino farmworkers’ exposure to pesticides is the most common example of environmental injustice faced by Latinos.⁵⁹
- Asian and Latino workers in the textile and apparel industries suffer increased exposure to fiber particles, dyes, formaldehydes, and arsenic, leading to high rates of respiratory illnesses.⁶⁰
- In Appalachian coalfields, low-income people continue to fight mountaintop-removal mining that has blown up peaks and buried more than 1,000 miles of headwater streams.

⁵⁵ Karl Jacoby, *Crimes Against Nature* (University of California Press, 2014)

⁵⁶ Jedidiah Purdy, “Environmentalism’s Racist History” (The New Yorker, Aug. 13, 2015), <http://www.newyorker.com/news/news-desk/environmentalisms-racist-history>.

⁵⁷ Angela Glover Blackwell, Stewart Kwoh, and Manuel Pastor, *Uncommon Common Ground: Race and America’s Future* (W. W. Norton & Company, 2010).

⁵⁸ David E. Newton, *Environmental Justice: A Reference Handbook* (ABC-CLIO, 1996).

⁵⁹ “Hidden Danger: Environmental Health Threats in the Latino Community,” Natural Resources Defense Council, accessed November 15, 2015.

⁶⁰ Julie Sze, “Asian American Activism for Environmental Justice,” *Peace Review* 16:2, June (2004), 149–15. https://ams.ucdavis.edu/sites/ams.ucdavis.edu/files/attachments/peace_review_essay.pdf.

ENVIRONMENTAL ELITISM

“Overwhelmingly white, a ‘Green Insiders’ Club” is how the mainstream environmental movement is described in the 2014 report, “The State of Diversity in Environmental Organizations.”⁶¹ Despite the increasing racial diversity in the United States, where people of color currently comprise 36 percent of the population, whites occupied 89 percent of the leadership positions in the 191 environmental organizations surveyed. Unconscious bias, discrimination, and insular recruiting were cited as key factors hampering recruitment and retention of talented people of color. The report called on environmental leaders to take action and make substantial changes to address the disproportionate inequities suffered by low income people and communities of color, inequities that have been exacerbated by mainstream non-governmental organization (NGO) actions.

DIVERGENT DEFINITIONS, LIVED EXPERIENCES

There are important differences in how people of color and whites define “environment” and “nature.” For example, for many Native peoples, the environment is not something separate from themselves, but rather a physical and spiritual part of oneself and one’s people. For John Muir, and many white environmentalists following the ideological path set by Muir, nature is something separate from people, meaning places meant to be protected and stewarded, not actively lived in. In its popular usage by most white environmentalists, the term “environment” has become roughly synonymous with “natural” or used to signify “the outdoors.” The etymological root of environment is the Anglo-French term *environner*, or, “to physically encircle.”

Humans often define nature by what we see when we look outside. What an African American child in New York City sees through her window will be different from what a white child sees from her window in rural Vermont. As noted by environmental sociologist Dorceta Taylor, “White people bring their experience to the discussion—that’s why they focus on the birds, trees, plants, and animals, because they don’t have the experience of being barred from parks and beaches.”⁶²

The Environmental Justice (EJ) movement is more ideologically inclusive; it integrates social and ecological concerns, treating and linking social oppression, exploitation, and injustice as inseparable from environmental degradation of the natural world. As Dr. Robert Bullard states, “The EJ movement has basically redefined what environmentalism is: where we live, work, play, go

to school, as well as the physical and natural world. And so, we can’t separate the physical environment from the cultural environment. We have to talk about making sure that justice is integrated throughout all of the stuff that we do.”⁶³

People of Color Care About the Environment and the Effects of Climate Disruption

Latino voters care about the environment and the effects of climate disruption.⁶⁴ Eighty-five percent surveyed agreed, “Reducing smog and air pollution is extremely or very important.” And, 66 percent of Latinos surveyed view climate disruption as the result of human activities, as compared to 57 percent of the general population. Fifty-four percent indicated global warming is very important to them personally, compared with 37 percent of whites.

According to National Asian American Surveys, 71 percent of Asian Americans self-identify as environmentalists, a figure that exceeds the national average by 30 percentage points. The proportion was even higher for Chinese Americans and Vietnamese Americans. Asian American and Pacific Islanders were significantly more likely than the national average to prioritize environmental protection over economic growth.⁶⁵

INTERSECTION BETWEEN ENVIRONMENTAL AND OTHER FORMS OF INJUSTICE

The Sierra Club’s values are rooted in principles of responsibility, fairness, and justice. All people have the right to breathe clean air, drink clean water, and live on healthy land. People also have a responsibility to be stewards of the land and to conserve resources that cannot be replaced. Both nature and people deserve justice and full protection under the law. We are each compelled by a moral responsibility to act.

To enlist humanity in this action, we must care what happens to our fellow human beings. People deserve clean air and water, but they also need to live without fear of police brutality, and to receive a living wage. Each person deserves civil rights as well as the right to explore, enjoy, and protect nature. When people of color are systematically denied their right to vote, that corrosion of our democracy serves the interest of wealthy polluters.

Despite contemporary and historical disenfranchisement from the environmental movement, and pervasive environmental injustice, people of color have clear,

63 “Environmental Racism in America: An Overview of the Environmental Justice Movement and the Role of Race in Environmental Politics,” The Goldman Environmental Prize, <http://www.goldman-prize.org/blog/environmental-racism-in-america-an-overview-of-the-environmental-justice-movement-and-the-role-of-race-in-environmental-politics/>, (accessed November 5, 2015).

64 Asma Khalid, “For Latinos, Environment Seems Just As Important As Immigration,” NPR.org, August 19, 2015, <http://www.npr.org/sections/itsallpolitics/2015/08/19/432774289/for-latinos-environment-seems-just-as-important-as-immigration>, (accessed November 5, 2015).

65 Karthick Ramakrishnan and Taeku Lee, “The Policy Priorities And Issue Preferences Of Asian Americans And Pacific Islanders,” The National Asian American Survey (2012), <http://www.naasurvey.com/resources/Home/NAAS12-sep25-issues.pdf>.

61 Dorceta Taylor, “The State of Diversity in Environmental Organizations,” (Green 2.0, 2014), <http://www.diversegreen.org/the-challenge/>.

62 Brentin Mock, “Are there two different versions of environmentalism, one ‘white,’ one ‘black?’” (Grist, July 31, 2014), <http://grist.org/climate-energy/are-there-two-different-versions-of-environmentalism-one-white-one-black/>.

strong, personal and cultural commitments to a healthy environment, and to a more inclusive movement. This is reflected in the ongoing efforts of hundreds of environmental justice organizations, the efforts of many Native American tribes, and the presence of organizations like the Center for Diversity and the Environment, Mission Critical, and the Green Leadership Trust, organizations that are dedicated to diversifying the environmental movement.

The job of environmental advocates now is to incorporate social justice as a basic tenet of environmental protection efforts.

PRACTICES FOR TRANSFORMATIVE CHANGE IN A MULTICULTURAL WORLD: EXPANDING REACH, BUILDING TRUST, AND DEEPENING RELATIONSHIPS

1. **Embrace diversity:** Seek to cross boundaries of psychological, physical, and social differences that occur among any and all individuals, including, but not limited to: race, ethnicity, nationality, religion, socioeconomic status, education, marital status, language, age, gender, sexual orientation, mental or physical ability, or learning style.
 - Embrace the intersectional nature of individuals' identities, including race, ethnicity, class, gender, and sexual orientation.
 - See differences as always present: Every individual is a multicultural being.
 - Locate your own cultures: A strong awareness of your own identifiers helps you more authentically relate to others' cultural identities.
 - Develop intimacy with the "other": Go beyond superficial acquaintance.
 - Develop shared vision, and allow for arrival from different directions.
2. **Foster inclusion:** Cultivate the ability to work from a multi-person, multi-group perspective, so that any individual or group can be welcomed, respected, supported, and valued to fully participate as their whole selves. Invest the effort to understand the needs of each person or group, and bridge those needs to achieve a shared purpose.
 - See the dominant culture as one of many: Dismantle assumptions about which culture defines the norm.
- Discover the influence of geography: Conversations about race, class, culture, and power shift as one moves around the country.
- Look for conflicting cultural norms: What happens when the norm of a particular group offends you?
- Look for intersecting identities: We have many ways of connecting with one another.
- Invite people early, so they can help shape and invest in how the effort unfolds.
3. **Apply an equity perspective:** Acknowledge historically underserved and underrepresented populations. Understand who shares benefits and who shares risks. Recognize that effective solutions need to be generated by—and in conjunction with—those closest to the issue.
 - See race as the major fault line in the U.S.
 - Look for the historical roots of institutions.
 - Consciously ask who might be left behind, and create approaches that will include all people.
4. **Practice cultural reciprocity:** Each person is an integral part of the whole who works to unleash the power and performance of everyone involved.
 - Engage in collaborative and team-based approaches rather than hierarchical relationships.
 - Recognize that depending on others deepens relationships and trust.
5. **Commit to learning and growing:** Developing cultural competency and working across differences is a lifelong journey that includes cycles of learning and growth alongside others. Own your mistakes and the harmful effects of your behavior; hold yourself and others accountable to actions and behaviors.
6. **Build transformational, rather than transactional relationships.**
 - Often, relationships between environmental organizations and low-income communities and communities of color have been transactional, as in, "We (environmental group), would like you (low-income group or people of color group) to sign on to our legislation or policy objective." Culturally based and inclusive movements do the hard work of opening organizations to affirm and welcome multiple realities, and then work together as a whole community or organization to determine points of oppression and address those together—protecting a natural area, or eliminating police brutality, for example.



- This involves more than acceptance of the “other;” it includes the ability to negotiate one’s own contradictions, to truly listen to another person’s stories and values, and to respect differences, but speak for the shared purpose.

Integrating Diversity, Equity, and Inclusion into Organizing Work

Adapted from Onge, P.S. (2009), *Embracing Cultural Competency*

- Everyone who needs to be at the table is present and all voices are honored equitably.
- There is space in the room for multiple leadership styles.

- If there is a historically dominant group in the room or process, they locate themselves not at the center of power, but in one of the orbiting circles.
- Resources are allocated to include the extra time required to build trust and clear communication.
- Strategies are consistent with shared values and guiding principles, all of which the community determines.

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CHAPTER 8: CREATING CONDITIONS FOR LEADERSHIP TO EMERGE

CHAPTER GOALS

- Identify how leadership contributes to effective campaign outcomes.
- Identify personal leadership qualities that contribute to transformational experiences for leaders and others they work with.
- Identify methods for ensuring that outreach activities are welcoming and inclusive for people who are interesting in taking part in Sierra Club activities.
- Identify how to plan and design campaign work that leads to growth, development, and learning.
- Help you assess your own leadership skills and identify ways to strengthen your leadership.

CAMPAIGN PLANNING: PATHWAYS TO LEADERSHIP

In the last chapter, we discussed how a series of tactics engages community members to take action on an issue, and increases pressure on decision-makers over time. Now that you have an idea of what you are going to do and when you are going to do it, you can begin to think about how to plan and implement that work with other staff or volunteers.

But first, let's ask the question: Why build leaders? Particularly in the early stages of a campaign, it may require far less time and fewer resources to simply, as the organizer, do the work to bring in the target number of community members to an event or action. So why spend the extra time training others?

The answer is that any effort that relies entirely on the organizer to deliver the grassroots power is inherently self-limiting. An escalation of the breadth of your grassroots power depends on an increasing depth of capable leaders who are willing to engage others.

CREATING CONDITIONS FOR TRANSFORMATIONAL EXPERIENCES

We discussed personal narratives in Chapter 4. You probably recognize that people use personal narratives frequently, often without being aware of it. Exercise your personal narrative skills by listening for these stories, and try to pick out the turning point or key moment that led to a deeper level of commitment to take action. One volunteer may have joined an outing taking young people into the outdoors who otherwise wouldn't get that chance, and found a way to help others. A veteran advocate may have started out by showing up to help with election phone-banking, only to end up leading the phone bank after a few nights, and seeing how it affected election results. A third volunteer may have been part of a team of youth leaders that shut down a coal boiler on campus.

These leaders each had an initial experience that made them feel welcomed and included in a way that matched

As you cultivate leadership in others, be sure to tend to your own leadership skills development. Seek out training, and be prepared to learn from those you are coaching.

skills, confidence, and further commitment to the work.

their interests and needs. They were given additional opportunities to contribute in a way that worked for them. It was the combination of their *first experience* and *successive opportunities to do more* that led each leader to commit—and then to develop their

To motivate and inspire action that develops over time, gaining levels of competence, commitment, and connection to the campaign, we need to be intentional about engaging new and existing leaders in transformational experiences over time.

GETTING STARTED: SETTING GOALS

How many leaders do I need? And from where do I draw leaders?

Goals for building leaders are directly connected to your base-building plan. For example, your research may have revealed that your target won their most recent election by 2,000 votes. You used this fact in your base-building plan to target the collection of 2,000 postcards to show a breadth of support.

Now the question is: How many leaders do you need who are able and willing to collect those 2,000 postcards? A safe estimate would be 20 leaders, with each responsible for 100 or so postcards.

Using your community map, you can determine where and with whom you need to engage so that the postcards will be meaningful. Key questions to think through include: Who will benefit? Who will be affected? Who has an existing interest in this issue, and who may learn that they have an interest in this issue? Who was left out, and who needs to be included for this effort to truly represent those directly affected?

Also, factor in time and space to build partnerships with marginalized groups and individuals, and listen to these groups and individuals to make sure the tactics are culturally appropriate.

GOAL-SETTING IN ACTION: PACIFIC NORTHWEST COAL EXPORTS CAMPAIGN

The Pacific Northwest Coal Exports campaign leaders decided that to demonstrate regional power to stop coal port development, they needed to make history with “the largest number of environmentalists ever” to take part in the hearings. Organizers estimated that to make that happen, they would need 3,000 people turn out at the hearings, which would take place between four and eight months in the future. This would require organizers in three states to meet goals of leadership development and community engagement, creating

“We are organizers of people, not organizers of tactics. We are successful when we cultivate the skills and capacity of others to lead and to execute the tactics of the campaign.”

DEFINING LEADERSHIP

You'll learn about Monitoring, Evaluation, and Learning, or MEL, later in this manual. The Sierra Club strives to be a learning organization, and to constantly improve our practices based on demonstrated results.

To understand our success in cultivating leaders, we start with a consistent definition of "leader." We say a leader is:

"A volunteer who is responsible for being part of recruiting, cultivating, and leading a team of three or more other volunteers. Leaders contribute at least 5 hours of time a month."

How will you choose to define a leader?

paths to engagement for community leaders and speakers, as well as outreach to specific communities they identified through their community mapping process, like small business owners who were operating near the proposed coal train routes.

One pathway to leadership they identified was to create community team leaders. The goal was to identify three to four leaders in each of 10 to 15 communities. Those leaders in turn would be responsible for turning out up to 100 hearing participants. To build the leaders needed to meet this goal, it would require one to two town meetings in each community, and between two and five one-on-one meetings per month to identify leaders.

DESIGNING MEANINGFUL PATHWAYS TO LEADERSHIP

Once you set goals, you are ready to carve out meaningful pathways to leadership. Developing more leaders helps to divide the work and grow our larger movement. Here are some of the steps to take in developing an effective leader:

Step 1: Identify a Potential Leader

As we have pointed out, potential leaders can be found in all sorts of ways, including outreach to a directly affected community, meeting with a potential partner

organization, sending out an action alert to an email list, or finding someone who is active on social media. Generally, a potential leader is someone who has taken repeated action to indicate that they are interested in the issue, perhaps by signing an online petition, and responding to a subsequent invitation by showing up to a meeting, an action, or a house party.

Step 2: The One-on-One Conversation

This is a critical step to connect with the person, learn about them and what is motivating them, and share with them about the campaign. It might be the time to talk through specific opportunities, or just listen to their story and hear about their background. Seek out their values, motivations, skills, and interests. It may take multiple one-on-ones to develop a relationship, and it may take attending several events they care about for the person to want to step up as a leader.

Step 3: The Initial "Ask"

Based on what you know about the person, or based on the context they hear in a team meeting, they can choose to take on an initial leadership task. Most initial leadership tasks center around engaging others. Some options include: gathering petitions at a community event, writing a letter to the editor, speaking at public meeting, or sharing content on social media. The task should reflect their interests and be culturally appropriate. It should also allow space for them to bring in their ideas for how to get it done.

Listen to the person's interests, and be open to roles that you may not have thought of.

Step 4: Supporting New Leaders

Leadership development is a two-way street. Offering feedback, evaluation, and appreciation after someone completes a task will help them to grow and continue to build the relationship. It will also encourage them to come back and be ready to take on the next task. Knowing their role had an effect helps them to understand how they are making a difference. For example, knowing that the five "yes" answers from a phone bank helped turn out 50 people for a big event is gratifying. By hearing about the positive outcome, you would feel that your two hours of phone banking was time well spent.

Step 5: The Leadership "Ask"

Once a person has taken on some smaller roles and

REMINDER:

Recruiting someone as a leader is not a transaction; it is an invitation to transformation. Avoid making assumptions, engage with curiosity and empathy, and don't rush the ask.

demonstrated willingness to take on more, it's time to make an individual "ask" of that person. This larger role will often involve team leadership, where the individual takes responsibility for recruiting, cultivating, and leading three or more other volunteers. (We'll discuss teams at greater length further in the manual.) During these conversations, you can point to all of the ways you have seen them acting as a leader, perhaps already doing the task that you are going to ask them to do. It helps to show them that this responsibility isn't too great of a leap; it is doable and will be a big help to the campaign.

CREATING WELCOMING AND INCLUSIVE ENGAGEMENT EVENTS

The first activity or event that a new person attends is a critical part of the process. If a new person feels welcomed, they are more likely to return. If they do not, there is a good chance that you will not see them again. Having a new person to come back opens up future possibilities for leadership—they could become your next rock-star canvasser or letter-writer. We have provided some checklists to help you design a welcoming first event.

PLANNING A FIRST EVENT: LOGISTICS CHECKLIST

- **Location:** Hold the event in the community where you are seeking to engage people.
- **Time and Date:** Plan it at a time that is most convenient to the group you are seeking to engage. If you are organizing parents, you may want to have it during the school day, or have childcare available.
- **Calendar:** Make sure there aren't any big, conflicting events being held for the people you want to attend. Find out when church choir, bible study, or other organizations' meetings are held, so your event won't conflict with their schedules.
- **Hosting:** Consider having the event organized or co-hosted by groups other than the your own organization, particularly if that is the best fit for the community. This may be a result of intentional partnership building with that organization.
- **Preparation:** Have nametags available for people to wear, and greeters at the entrance to welcome people inside.

PLANNING A FIRST EVENT: AGENDA CHECKLIST

- Start the meeting or event with introductions, including an icebreaker activity (such as a get-to-know-you game).
- Set out norms/ intentions at the beginning of the meeting, and keep in mind that norms of partici-

LEADERSHIP DEVELOPMENT IN ACTION

Elizabeth, an organizer in Alton, IL, first met Alex at a holiday tabling event. Alex was there helping her mom sell crafts. Alex is a 20-something female, not a typical Sierra Club volunteer for that area, where volunteers tend to be older white men. Elizabeth invited Alex to coffee and learned more about Alex's interest. At the end of the one-on-one, she suggested Alex would enjoy sitting in on a team meeting that was taking place the following week.

Alex came to the first meeting and kept coming back to subsequent meetings. She felt welcomed by the group, engaged in the conversation, and indicated willingness to participate in tasks between meetings. After a few months, the organizer started to have regular one-on-ones with Alex, and asked her if she would like to chair an upcoming meeting. She said yes.

After that first leadership role, Elizabeth pulled Alex aside, and complemented her success in running the meeting, identifying specific examples of good leadership, and asked if she was willing to chair the next meeting as well. Because Alex had become comfortable speaking in front of groups during meetings, she also said yes to emceeing at a movie screening of "Coal Ash Stories" with the film's director.

During this process, Elizabeth asked Alex to envision herself as the chair of the group and what skills and attitudes she wanted to develop to be successful, keeping in mind the male-dominated nature of the group. Elizabeth and Alex now have a regular time to talk and plan future meetings so Alex can be successful in chairing them. She has emerged as a leader in Alton and has since engaged in additional Sierra Club responsibilities.

pants may clash.

- Have people from the community perform key functions, including sharing their own stories of why they are involved.
- Make sure there is formal or informal space for people to build relationships with each other. This might be allowing time to socialize, or a more formal partner or small group activity. Sharing why

you are here and why you care about the issue will help people to refine their own stories and connect across communities. Listening to others' stories of why they care is empowering.

- Provide opportunities for people to give campaign input that draws on their own experiences and knowledge.
- Present multiple options or pathways for people to get involved.
- Create space for new ideas to emerge based on the resources and interests of the people who come to meetings.

AVOIDING PITFALLS IN DESIGNING LEADERSHIP WORK

The Sierra Club engaged leading researchers to examine how we could make our work tasks more motivating. Among other lessons, we learned that people were often turned off not by the tasks themselves, but by the way we designed the tasks. As a result, fewer people would engage in or complete initial tasks, resulting in fewer leader prospects. Here are some of the flawed tendencies that we saw:

Leaders or Organizers:

- Broke tasks down to make them seem short and easy, but ended up designing a job that was boring, seemed insignificant, and/or didn't lead to greater responsibility.
- Broke tasks down in a way that didn't lead to a next step on the timeline of the campaign—in other words, a one-off activity.
- Asked people to take on work with no clear deliverables or timeline.
- Asked people to take on a giant new role with little guidance or coaching.
- Assigned work without designing processes for check-ins, feedback, and debriefing.

Remember, growing our base means always welcoming new people. This means most of our events are “first” events!

By being thoughtful about how many people we need to engage and when, creating opening and welcoming events, and being intentional about one-on-one conversations and asks, we can make sure there is a place for everyone and create the future that we want to see.

RESOURCES AND TOOLS: VOLUNTEER LEADER TIERS

This tool is meant to help organizers understand where their leaders are in the development process and help

EXAMPLE OF A WELCOMING FIRST EVENT

The Clean Power Lake County Campaign launched in 2013, with a goal of retiring the Waukegan coal plant. The Sierra Club had a strong membership in Lake County, but not in Waukegan itself. Waukegan is a majority Latino community. As part of the campaign planning, and informed by their community map, the campaign leadership team decided to focus on building up leadership and a stronger base in Waukegan.

They launched a Waukegan-specific petition and created a series of actions in the community including a beach sweep, a social, a Day of the Dead march, and a petition delivery. The social, a two-hour meet-and-greet at a popular restaurant, occurred in the middle of these activities. The program section was only 20 minutes long, so there was plenty of time for people to socialize and for leaders to connect with new attendees.

At the meeting, four leaders, three of whom were from Waukegan and people of color, shared their stories of how and why they got involved. Attendees were then given multiple options for getting involved, including sharing a video about the campaign on social media, collecting petitions, or coming to the next event with friends. About a month later, more than 150 people turned out to the Day of the Dead March, Clean Power Lake County's largest and most diverse event to date. Out of that event, a new, rock-star leader emerged who is now heading up the social events team.

managers to coach them. There are many paths of leadership development and these tiers are not meant to specify a path for every individual.

The activities noted under each tier are representative of the types of work and commitment a leader will demonstrate. They are not comprehensive, and no one volunteer is likely to do all of these activities.

Tier 1 - Exploring deeper commitment

- Regular participation (comes to meetings and events)
- Willingness to reach out: petitioning, phone banking, bringing people to events or meetings

- Awareness of Story of Self
- Willingness to report back from attending events
- Understanding of the issue

Tier 2 – Demonstrates understanding of personal narrative and campaign narrative, and is able to use them in different ways

- Ability to tell their own story and comfortable sharing it through different mediums, (e.g., LTEs, testimony, team meetings, etc.)
- Can lead a section of the meeting
- Can meet with allies
- Can meet with other members or potential members of the team
- Can meet with elected officials
- Creates social media content
- Has ability to communicate about the time they can commit

Tier 3 – Self-identifies as a leader on the campaign

- Willingness to engage in different levels of activities

Many volunteers don't want to be leaders, and that's okay! Whether a person signs a petition, attends two public hearings, or leads a team of six other volunteers, they are all contributing to the campaign's success and empowering the larger movement. We celebrate and appreciate their participation.

and leading others in taking these actions

- Willingness to hold others accountable
- Leading phone banks
- Chairing a meeting
- Leading tabling events
- Reaching out to press
- Leadership role within the Sierra Club structure (group executive committee, chapter executive committee, etc.)
- Understands where the campaign pieces fit in the bigger picture of the issue

A NEW FOCUS ON LEADERSHIP

By Hahrie Han and Robin Mann

WHY FOCUS ON LEADERSHIP?

When people think about building power, they often think of money (“We need more money to win this battle!”), clicks (“If only we could get a million people to sign this petition!”), media (“Let’s get this into the headlines!”), or celebrity (“Which famous people can we get on board?”). Particularly in the 21st century, with the rise of technologies that make it much easier to engage people in collective action, we have seen a surge of “leaderless” campaigns. After all, why do we need leaders when we can get hundreds of thousands of signatures on a petition using a clever hashtag and a few well-crafted messages?

To answer this question, we need to explore the relationship between leadership and power. Although “viral engagements,” such as the 2014 Bring Back Our Girls protests, are becoming more common and widespread, many of these kinds of campaigns have been unable to achieve the changes they sought. Even widespread viral engagements, like the protests in Tahrir Square in early 2011 that kicked off the Arab Spring, saw only short-term gains. Although protestors were able to oust then-President Mubarak from power, they were not able to protect that win over time and the military regained control of Egypt in 2014.

The ability to win durable gains for a constituency depends not only on collective action, but also on building lasting power. In organizing, power does not come from having more money, charisma, or media attention; rather, power comes from having more committed leaders. With a cadre of committed leaders, campaigns and organizations can strategize to acquire the other resources they need to win. Only by building leadership will our movement develop the capacity it needs to achieve our goals.

WHAT IS LEADERSHIP?

To borrow a definition from long-time organizer Marshall Ganz, “Leadership is accepting responsibility to create conditions that enable others to achieve shared purpose in the face of uncertainty.”⁶⁶

As Ganz argues, several aspects of this definition are worth noting:

1. Leadership begins with the choice to accept responsibility.
2. Leaders are those who help us navigate uncertain-

ty: When there is no uncertainty, leadership is unnecessary. To work on an annual budget review or other routine tasks, we don’t need leaders—we need managers.

3. True leaders do not work alone. They “enable others to achieve shared purpose.” As Ganz writes, “Leaders accept responsibility not only for their individual ‘part’ of the work, but also for the collective ‘whole.’”
4. Leaders create conditions that make it likely others will be able to achieve their purpose. There are many conditions that leaders cannot control, such as changing trends in political polarization, and unexpected focusing events like the 2014 shooting of Michael Brown in Ferguson, Missouri. Working within constantly changing circumstances, leaders create the motivational, strategic, and structural conditions that enable others to act to achieve their own goals.

This approach to understanding leadership bucks common misperceptions. Leadership, in this context, is not about being the most charismatic person in the room, nor the person with the most knowledge. Nor is it about being the person who is the most visible—leading the meeting, talking to the media, or organizing in the event. In fact, the most effective leaders may be the people you don’t often see, those who made it possible for *others* to be at the front of the room. Similarly, leadership is not limited to a single style—adaptive, authoritative, disruptive, or anything else. Many different kinds of leaders can accept the responsibility for creating conditions that enable others.

Organizing, or movement-building, is partly a process of cascaded leadership development: A group of leaders develops another set of leaders drawn from the constituency who wants to make change, who then develop another, wider set of leaders, and so on. As they build up the leadership of the constituency, they build the power to make change.

“Leadership is accepting responsibility to create conditions that enable others to achieve shared purpose in the face of uncertainty.”

—Marshall Ganz

⁶⁶ Marshall Ganz, “Leading Change: Leadership, Organization, and Social Movements” in *Handbook of Leadership Theory and Practice*, eds. Nitin Nohria and Rakesh Khurana (Harvard Business School Press, 2010), 509. <http://marshallganz.usmblogs.com/files/2012/08/Chapter-19-Leading-Change-Leadership-Organization-and-Social-Movements.pdf>.

HOW DO ORGANIZATIONS DEVELOP LEADERSHIP?⁶⁷

Hahrie Han recently authored the work, *How Organizations Develop Activists: Civic Associations and Leadership in the 21st Century*. In that work, I [Hahrie Han] describe how campaigns and organizations build leadership. The book begins by asking: Why are some organizations better than others at getting—and keeping—people involved in activism? To answer this question, I look particularly at what the organization does. So many

TRANSACTIONAL MOBILIZING: Focused on building power by building breadth, or getting more people to do more stuff—trying to achieve high numbers by allowing people to self-select into whatever level of activism they desire.

TRANSFORMATIONAL ORGANIZING: Focused on building power by building depth, or cultivating the motivations and skills people need to build their capacity for leadership and further activism—creating spaces that transform people’s individual and collective agency.

factors that the organization itself cannot control affect its ability to engage activists. What about the things it *can* control? Do they matter?

In researching these questions, I find that the core factor distinguishing high-engagement organizations is the way they transform people’s capacities for involvement and ignite a sense of individual and collective agency. Just like any other organization, these high-engagement organizations want to get more people to do more stuff, but they do it in a way that cultivates the individual’s moti-

vations, develops their skills, and builds their capacity for further activism. They combine this kind of *transformational* organizing with *transactional* mobilizing, or a hard-nosed focus on developing not only the depth of activism they needed, but also the breadth.

To successfully organize, high-engagement organizations use distinct strategies for recruiting, engaging, and supporting volunteers. These different practices for developing leaders can be delineated in three models of engagement: lone wolves, mobilizers, and organizers. Each model of engagement begins with a basic assumption about how the organization can build power to achieve its goals.

For example, lone wolves often choose to build power by leveraging information—through legal briefs, public

comments, and other forms of research advocacy. Mobilizers and organizers, by contrast, choose to build power through people. Organizers distinguish themselves from mobilizers, however, because they try to transform the motivations and capacities of their members to cultivate greater activism. As Joy Cushman, the Campaign Director for PICO says, “The organizer thus makes two [strategic] choices: 1) to engage others, and 2) to invest in their development. The mobilizer only makes the first choice. And the lone wolf makes neither.”

Each model of engagement leads to a different set of choices about how to recruit, engage, and support volunteers. Because people most commonly confuse the distinction between mobilizing and organizing, the following table summarizes some of those differences (adapted from *How Organizations Develop Activists*, p. 9).

MOBILIZING	HOW DO THEY DIFFER?	ORGANIZING
More numbers	Strategy for Power	Transformative leaders
Targeting, engage latent interest	Building Membership	Build agency among a distributed network of leaders
Centralized responsibility	Structure	Distributed responsibility
Independent	Types of Asks	Interdependent, autonomous
Marketing pitches	Communications	Relationships
Minimal	Support	Extensive

By *combining* transformational organizing with a focus on metrics, the highest-engagement organizations can build the breadth and depth of activism they need.

For example, the 2008 and 2012 Obama campaigns combined deep, transformational organizing with broad, transactional mobilizing to win. As Alex Steele, a deputy field director in Colorado for Obama in 2012, said, “We’re organizing to win an election, but at the end of the day, you...want to leave behind stronger people and stronger communities than when you got there.”⁶⁸

To build this base, the 2008 and 2012 Obama campaigns focused heavily on developing leadership among volunteer teams. Where most election campaigns would simply try to generate as much voter contact as possible, the Obama campaigns held staff accountable for different metrics: holding one-on-one meetings with supporters, recruiting volunteers to be neighborhood team leaders, and cultivating interdependent “neighborhood

67 Note that portions of this section, including direct quotation of Joy Cushman, are borrowed from summaries of the book Hahrie Han wrote on The Monkey Cage blog at The Washington Post and OrgTheory.net.

68 Elizabeth McKenna and Hahrie Han, *Groundbreakers: How Obama’s 2.2 Million Volunteers Transformed Campaigning in America* (Oxford University Press, New York, 2014).

teams.” In August 2008, Jeremy Bird, who was then the general election director in Ohio and eventually became the national field director of Obama for America 2012, held his nearly 500 organizers accountable for only two daily metrics: the number of house meetings held and the number of volunteer team leaders confirmed. Bird wanted them to focus less on canvassing persuadable voters, and more on turning volunteers into leaders.

As a result, the rate of voter contact in the Obama campaign looked more like a hockey stick than a steadily increasing line—a pattern that could have caused alarm in a campaign that was not invested in base-building. The line representing voter contact looked almost flat in the first few months of the campaign, when their focus was on building local teams—or transformational organizing—and then grew exponentially as Obama for America unleashed the capacity they had built in the early phases to do the transactional mobilizing. By shifting the metrics it emphasized from one phase to the next, the campaign created conditions that enabled its leaders to invest in both the organizing and mobilizing it needed to win.

The assumption behind this kind of campaign is that base-building and voter contact are, in the end, symbiotic: Investing in building the capacity of communities and volunteer leaders should lead to a higher-quality electoral program. Indeed, the Obama campaigns inspired higher levels of voluntarism than any other campaign that preceded them. By their own count, they engaged 2.2 million volunteers in the 2012 election that were organized into 10,000 neighborhood teams run by 30,000 volunteer leaders.⁶⁹

Leadership development, thus, is not like a soup recipe where you put all the ingredients into a pot and stir. Nor is it limited to one type of training, model, or methodology. Rather, it incorporates a set of practices into an organization or campaign that constantly develops people’s capacity to act on their goals—and creates the structures, strategies, and stories that enable leaders within the organization to keep that work at the center of what they do.

REFLECTIONS ON THE SIERRA CLUB’S ACTIVIST RECRUITMENT AND ENGAGEMENT

In the rapidly changing advocacy environment of the last two decades, the Sierra Club has had to adapt. Civic associations are under tremendous pressure to leverage the flood of new, online tools to build their power, and at the same time, to satisfy funders who increasingly

demand to see a return on their investment and tend to focus on metrics, such as the numbers of people engaged in an action.

In the early 2000s, the emergence of climate disruption as the overarching challenge for the environmental movement, and the changing nature of what it takes to win, prompted the Sierra Club to partner with a Harvard University team led by Marshall Ganz and examine how we could increase our organizational effectiveness.

This team, dubbed National Purpose, Local Action (NPLA), analyzed existing Sierra Club structures and functions and concluded that, while the Sierra Club’s effectiveness was “critically determined” by state and local volunteer leadership, the concept of leadership was generally misunderstood, and many volunteer leaders lacked the requisite skills and standards of practice they needed to be effective. Most volunteer leaders were operating as lone wolves, creating a “you do your thing” syndrome. In addition, a “heroic” leadership style was common in campaigns, rather than a “relational” style aimed at engaging others.

In its unpublished report to the Sierra Club, the NPLA team recommended reorienting volunteer leaders around Marshall Ganz’ definition of leadership, “...the work of creating conditions that enable constituents to achieve shared purpose in the face of uncertainty.” The team noted, “Skillful leadership requires practical mastery of the arts of relationship building, motivation, strategy, and action.”

The NPLA team also recommended a shift towards teamed leadership and drawing out the expertise of others, rather than “reliance on authority of expertise.” The Sierra Club responded by launching a two-year pilot Leadership Development Project to train volunteer leaders in the recommended structures, skills, and practices that would enable them to lead more effectively.

In the earlier days of the environmental movement, it didn’t necessarily take broad public support to win—the preexisting leadership styles and practices the NPLA team identified delivered significant victories in the past. The inside game of delivering compelling information and arguments to decision-makers was a significant, and in some instances, the deciding factor in achieving a desired result. Campaign leaders honed their arguments with a strong rationale and good facts, and, as necessary, amplified their voices with support from others in the environmental community. And of course, all of this occurred within a more functional political system than currently exists.

The immensity and urgency of climate disruption has prompted a deeper, humbler understanding that avert-

⁶⁹ 2012 Obama Campaign Legacy Report (Obama for America 2012). <http://secure.assets.bostatic.com/frontend/projects/legacy/legacy-report.pdf>.

ing the worst effects will require much greater power than just a high-functioning Sierra Club and its traditional allies. A much bigger, broader, and more diverse movement must be built, one with the power to drive the scale of change needed. As building the climate movement has become the Sierra Club's priority, our need for volunteer leadership to build our capacity goes beyond even that identified by the NPLA team. Experience with policy-setting, organizational management, and political strategy don't automatically translate to competency in reaching and bringing along new leaders and building relationships with diverse constituencies. New skills and competencies are required, and must be acquired.

The Sierra Club is now engaging in three basic strategies to fulfill this need:

1. **Valuing transformational leadership:** We are placing greater value on transformational leadership development and investing the time and effort it requires.

We are also emphasizing and measuring chapter and group effectiveness in building new leadership.

2. **Training and developing leaders:** There is unmet demand among volunteer leaders for training in the skills and competencies needed for effective movement building. We are invested in expanding the LDP model of leadership and team building, as well as in expanding the delivery of volunteer trainings.
3. **Modeling success:** We are committed to sharing and modeling success stories in which effective volunteer leadership efforts played a key role in building a broad, collaborative, and powerful constituency.

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CHAPTER 9: INTEGRATING ONLINE & OFFLINE ENGAGEMENT TACTICS

CHAPTER GOALS

- Explore the role online tools and tactics can play in our volunteer engagement efforts.
- Look at “leadership ladders” as a way to think about moving people from online to offline action.
- Learn how to include strategic online arcs of activity in your campaign timelines.
- Provide worksheets and resources for planning the use of online resources as a part of your engagement and leader development strategy.

In prior chapters, we have emphasized face-to-face activities in our base-building and leader development approach. In this chapter, we explore online tools as a powerful way to enhance and expand your grassroots work, and ways to integrate them with your in-person organizing. In keeping with the overall focus of this manual, we do not spend time discussing the tactical use of online tools as a means to directly influence your target, e.g. the value and use of online petitions, action alerts, or Twitter hashtags as an expression of the community's will.

The Fast-Changing World of Online Engagement Tools

Many of the tactics we have discussed up to this point have been used by generations of social change activists. Organizers who have been active since the late 90s have increasingly been able to rely on email and web pages to disseminate information and communicate with people. However, over the past 10 years or so, the explosion of tools available via the internet and/or mobile technology has greatly enhanced the resources available to engage others in our campaigns.

In the earlier stages of the internet, access was limited to a narrow band of mostly wealthy people. Today internet access is more widespread, but far from universal. A [Pew Research poll of 2015](#) found that 15 percent of Americans don't use the internet. Those numbers are higher among rural residents (24 percent), adults

ADDUP.ORG

AddUp.org is an online resource being developed by the Sierra Club. It provides a platform for action and social sharing that is simple, powerful, and effective. Users can sign up for local events, take online action, share information with Facebook friends, track their efforts, and tweet about their campaigns.

More than 300,000 people already use AddUp.org, and new campaigns are being created regularly. Plans are in the works to enable local activists to set up their own campaigns using [AddUp.org's](#) powerful suite of tools.

Sign up, log in, and join us at [AddUp.org!](#)

without a college degree (23 percent of those with a high school diploma; 33 percent of those without a high school diploma), and people from low-income communities (25 percent). In short, don't assume internet access is widely available or used in your community. Use your community mapping process to investigate this. In some cases, a wider range of constituents will have access to text messaging via their mobile phone rather than internet connection.

We're confident that the people reading this manual have already innovated online engagement tools in ways that we can't anticipate. So our objective is not to categorize available online tools and describe their use (though we will touch on a few), but rather to focus on how these tools can help us in our fundamental tasks of engaging others, deepening their involvement over time, and moving them into positions of leadership.

THREE-STEP MODEL OF ENGAGEMENT

When you are thinking about the use of both online and offline tools as an engagement strategy, consider breaking it down into three steps:

1. **First Contact:** your very first opportunity to connect with a person, before you know their name or any way to contact them directly.
2. **Deepening Engagement:** using an existing list of names and means of contact to reach out and provide opportunities for action.
3. **Leader Development:** moving people from being "action-takers" to being "action-makers."

For each of these steps, there are different combination of tools and approaches for both offline and online tactics.

First Contact

If you're starting from zero, you'll have no phone lists or email addresses to work with. Getting out into the community and meeting people face-to-face becomes the essential first step, and gathering names, cell phone numbers, email addresses, and other contact means becomes a core objective.

By the same measure, starting with a large list has pitfalls of its own. It can be tempting to rely on that list, working it hard and viewing it as your primary or even sole source of contacts. In this scenario, online outreach can be a useful booster. An email or Facebook post sent from your existing volunteer base to their social networks, linked to an online petition or sign-up page, can expand your pool of contacts and potential volunteers.

Deepening Engagement

When it comes to taking action online, there is a segment of change-makers who may look down their noses at the “clicktivist,” a derogatory term for frequent online action-takers, implying a mindlessness and shallow commitment.

In fact, online engagement is a real and powerful form of activism, easily capable of cultivating people along leader development pathways. As the organizer, your job is to think of online engagement in terms of escalation, much as we think of the earliest stages of repeat offline engagement.

One way the Sierra Club thinks about escalating online engagement involves “online arcs.” An online arc is a series of at least three communications, often delivered via email, but texting and other online tools are viable as well. An arc starts with a low-level, initial online action to a broad group, moves to a follow-up activity that requires a higher level of participation from people who took action on the initial communication, and finally, an invitation to participate offline. For example, you might start by sending out an online petition, then ask the petition signers to write a letter to the editor (LTE), and then asking those who agreed to write a letter to volunteer for an event.

Leader Development

Much of the organizer’s work is in building teams of leaders and activists who work together to plan and deliver tactics that escalate pressure on our target. For many people, the face-to-face interaction of that teamwork is an appealing part of leadership.

However, for reasons of geography, capability, or just personal preference, you’re likely to have some leaders who work better from behind the keyboard. Don’t neglect these folks! Social networking tools, texting networks, video conferencing, and other technologies create plentiful opportunities for authentic leadership. A well-built, reliable online leadership team can create a powerful network of activists who can amplify the work of your in-person teams and events.

THE “LAW OF HALVES”

Saying you’ll do something is not the same as actually doing it. Experienced organizers often find that as they engage people through sequences of action to deepen commitment, there is a remarkable consistency to the ways in which people drop off.

The “Law of Halves” suggests that half of your pool of people will drop out at each stage of decision. So, if you spend the day tabling and get the names of 20 people who are willing to volunteer, when you follow up with a phone call, only 10 will agree to meet for a one-on-one, and only 5 will show up.

This Law of Halves applies to person-to-person contact. Online contacts, particularly impersonal ones, will typically have a much lower rate of response.

WHY DID YOU TELL ME THIS? IT’S SO DEPRESSING!

As people who have chosen to organize, we’ve self-selected as an especially committed bunch. If everybody had our level of commitment, we would have nothing more to do!

The Law of Halves is a tool to help you estimate the work involved to meet your goals. When a person says “no” or doesn’t show up, it’s not a personal rebuke. In fact, it could be an opportunity to ask them if there is something else they would prefer to do.

WORKSHEET: CHART YOUR ENGAGEMENT TACTICS

Every organizer will have a different set of resources to work with, in terms of funding, leader skills, online tools, physical office space, etc. Think about your resources, offline and online, and chart out tactics you can use to engage people at each of the three steps.

	ONLINE TACTICS	OFFLINE TACTICS
First Contact: Steps to engage individuals for the first time and secure their names and means for future contact.		
Deepening Engagement: Linked, escalating steps of involvement that deepen an individual's commitment to the campaign.		
Leader Development: Moving a person from being an action-taker to being an action-maker.		

BUILDING LEADERS: MOVING ACTION-TAKERS FROM ONLINE TO OFFLINE ENGAGEMENT

Moving action-takers from online to offline, or to any type of leadership, is a significant step of commitment. We're most effective when that transition minimizes the size of the leap involved.

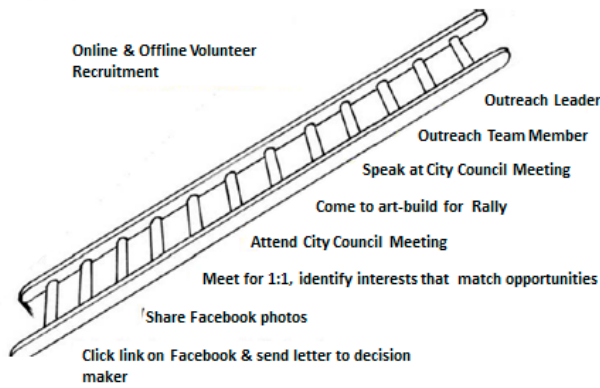
One best practice is to ensure that online and offline actions are clearly related. An online activist whose work has been related to signing and promoting an online petition is likely to feel thrown off if you ask them to attend a campaign meeting to discuss some other aspect of the campaign. But if your ask is for the activist to be part of the contingent presenting the petition they have

been working on to the targeted elected official, it's likely to feel like less of a leap to them, even if it seems like a bigger leap to you.

Beyond ensuring that the actions are clearly connected, another consideration is escalation of responsibility. In the Sierra Club, we refer to this as the "Leadership Ladder."

The leadership ladder is a conscious exercise to build successive rungs of involvement that invite volunteers to take the next step as a manageable and appealing action. The magic that makes a ladder work is the "ask." Whether it happens online in the form of a follow-up request, or in a one-on-one meeting when inviting someone to join a team, the act of explicitly asking someone

Leadership Ladder



Some volunteers will jump a number of rungs on the leadership ladder. Others will go back down some steps after trying out a higher level of involvement. As an organizer, you will strive to move people to higher rungs of leadership as a means to grow the depth of your campaign. But remember, power includes both breadth and depth. The people who sign one online petition or do just one or two in-person actions in a year are demonstrating a commitment to your work and helping you to victory—appreciate them!

PLANNING AHEAD

Online tactics should be included in your campaign timeline. Think carefully about online arcs, and time your online outreach efforts to synchronize with the other objectives of your campaign. A frantic round of calls for volunteers two days before your tabling event is a gamble. A three-step email arc, followed by a phone bank of those who completed the arc, will yield much more predictable results (and increase the visibility of your campaign).

The sample timeline below gives a flavor of how you might map out a more exhaustive recruitment effort—in this case, for building a team structure.

CONTINUE THE ENGAGEMENT CYCLE

Online tools can and should be used throughout the

LEADERSHIP LADDER TIMELINE

MONTH 1				MONTH 2				MONTH 3			
Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Send online petition action alert email	Send petition cap request to action takers	Call sign-ups to follow up – deliver/mail petition packets	Follow up with calls/emails offering support	Follow up for progress check Deadline reminder by phone or email	Schedule one-on-one meetings to debrief	Have one-on-one debriefs Ask to join teams	Have one-on-one debriefs Ask to join teams	Have one-on-one debriefs Ask to join teams	Prep for team launch meeting	Prep for team launch meeting Make reminder calls	Official team launch meeting

Don't forget to think about how large your prospect pool needs to be to get to your goal number of team members. If you want five team members, you should plan for 10 to 12 one-on-ones. And if you need to have 10 to 12 one-on-ones, you should plan to have 20 to 25 petition captains."

lifecycle of your campaign. As we've described, they work best when we consider them as a part of a larger strategy to move our target, to and grow and deepen our grassroots power.

The one-on-one that you have with a new prospect six months into your campaign is just as likely to yield a strong leader as the one-on-ones you conducted at the beginning. If you are continuously using online arcs and other tools to engage new people to help with the campaign, your team will be more sustainable and can continue to build more power. Your team can also use online tools to continue to engage the campaign target (for example, directing multiple tweets at a target), and continue building your prospect pool.

Making an explicit ask of a volunteer is a central part of many one-on-one conversations, but it can feel awkward without practice.

Role-play this skill with one person acting as organizer and the other as volunteer. Make the conversation as authentic as possible. When complete, have the volunteer grade the clarity and effectiveness of the organizer's ask on a scale of 1 to 10.

As your contact list grows, it can be tempting to engage that list with "one-off" calls to action. For example, a tactical email action alert that asks supporters to contact their legislator on a bill, with little or no preceding information or context, and no follow-up. Keep in mind the distinction made in an earlier chapter about the "mobilizer" versus the "organizer." We consistently strive to deepen the capacity of people to be agents of change in the world—that is what sets us apart as organizers. If an online tactic doesn't fit within a larger strategy of deepening engagement, think twice before hitting "send."

Online-to-Offline Team-Building Strategies in Action

A Colorado-based Sierra Club Beyond Coal organizer used a combination of well-planned online outreach and dogged offline follow-up to win 11 one-on-one conversations with new volunteers and five new volunteer team members for the Stop Polluters Campaign. Here are the tactics that were used:

Online Engagement:

- Our first email included a broad “ask” meant to solicit general support by asking recipients to sign a simple petition supporting the EPA.
- Because it was a simple ask, we sent the petition to general lists in two key geographic areas: Denver, where we already had a large list as well as the resources and proximity to bring potential volunteers directly into our work, and El Paso County, specifically Colorado Springs, where we hadn’t done much direct organizing in the past, but knew we would need to in the near term. From this effort, we got 665 petition signatures.
- Instead of using a “tell-a-friend” auto responder, we changed the subject line to “Tell us how you want to be involved.” The email explained that, “We need people like you who care about protecting our health and our environment from the effects of pollution to join us,” and asked them to take a simple volunteer survey we had set up to let us know how they’d like to contribute to our campaign in Colorado. This netted us 17 responses from people who were interested in committing 1 to 20 hours per week.
- A week later, we sent a follow-up email to all petition signers that hadn’t yet taken the volunteer survey, asking them again to volunteer. From this action, we got three additional responses.

Offline Engagement:

- Once the survey responses were submitted, the Organizer spent a week and a half calling everyone on the list at least twice, which resulted in nine conversations. The Organizer then took all the survey responses, put them in a spreadsheet, and prioritized them based on the number of hours the responder said they would like to commit and the activities they were interested in. This enabled him to keep track of contacts and commitments.
- The Organizer sent a follow-up email to the people he didn’t reach by phone, asking to schedule a time for a phone call.
- Because some of the volunteers were located outside of Denver, where the Organizer is based, he set up group meetings for new volunteers in Pueblo

and Colorado Springs. Those group meetings were attended by volunteers recruited through the survey, some chapter volunteers that would be involved in the Beyond Coal campaign work moving forward, and volunteers recruited through in-person contact.

- Though one volunteer stood him up, the Organizer had 10 one-on-ones and five volunteers that went on to committed roles as team members.

Why It Worked

In this example, we focused our outreach in areas where we knew we wanted to build long-term teams. The short-term campaign gave us a good framework and an initial task for new volunteers to get involved with, but the resource investment to get those volunteers was considerable, so it was good that they could be plugged into an ongoing local campaign fight after the short-term campaign was completed.

Maybe for the first time, we asked people to tell us how they wanted to be involved—rather than just telling them what we needed. Our Beyond Coal work in the Colorado Springs area has just begun, so we hadn’t done a lot of online-to-offline engagement there, meaning that people may not have known they could be involved with our campaign work locally. Being new in this community meant that we first had to gain an understanding of how to best communicate with local people, which should be done before developing any engagement strategy.

We moved people up the ladder of engagement right away! We first offered a very simple action: sign a petition patting the EPA on the back. This allowed even those new to the Sierra Club email lists to take an action that directly related to what we were going to ask them to do next. Immediately after taking that action, we emailed them the volunteer survey. After they’d submitted a survey, the Organizer called them within a week. Allowing very little lag time between actions helps to keep people’s attention focused, and shows them we’re interested in what they’re doing and what they want to do next.

The questions about “how many hours a week” and “why would you like to be involved” helped us filter volunteers by commitment and prioritize what needed to be done. A few people entered “0” hours, or said they were satisfied with their current level of engagement—so, no need to follow up with them! (We didn’t count these zeroes as responses in our numbers.) Others wanted to be very involved and give 5 or more hours a week, giving us a clear priority for engaging them and evaluating their skills, as they were potential new team leaders.

RESOURCES & TOOLS: ONLINE-TO-OFFLINE RECRUITING TACTICS

You can use the worksheets we’ve provided to apply the strategies in this chapter to your own campaign.

Online-to-Offline Engagement, Part 1

Answer the questions in terms of your campaign matrix. Think about your campaign plan for the next 3 to 6 months. What is your plan to build your list, and/or to engage your existing list using online-to-offline tactics?

1. WHAT ARE YOUR CAMPAIGN GOALS?
2. WHAT ARE YOUR VOLUNTEER LEADER AND TEAM GOALS? HOW WILL VOLUNTEERS HELP YOU WIN YOUR CAMPAIGN AND BUILD THE MOVEMENT?
3. WHAT TACTICS WILL YOUR RECRUITED VOLUNTEERS USE TO HELP MEET THE CAMPAIGN GOALS?
4. HOW WILL YOU ASSESS YOUR LIST?
5. WHAT IS YOUR FOLLOW-UP STRATEGY?
5. HOW WILL YOU EVALUATE VOLUNTEERS AND ENGAGE THEM IN DISCUSSION ABOUT MOVING UP THE LEADERSHIP LADDER?

Online-to-Offline Engagement, Part 2

Look at the questions you answered in Part 1. Using your answers, plan an engagement arc with three actions that

correspond to the peaks and valleys in your campaign for the next 3 to 6 months. Remember that each action should move your volunteers up the leadership ladder to narrow down your list of team leader prospects.

Arc Planning Worksheet

CAMPAIGN OBJECTIVES TO BE MET WITH THIS ARC	
ONLINE ORGANIZER/ VOLUNTEER (NAME OF PERSON MANAGING LIST, CREATING EMAIL, TRACKING RESPONSES)	
FIELD ORGANIZER/ VOLUNTEER (NAME OF PERSON FOLLOWING UP WITH EMAILS, CALLS, ENGAGING PERSONALLY)	
OVERALL GOALS FOR THIS TACTIC	
ONLINE GOALS	
OFFLINE GOALS	
LEADERSHIP GOALS FOR THIS TACTIC	

	EMAIL #1	EMAIL #2	EMAIL #3	EMAIL #4
DATED				
TARGET				
AUDIENCE				
ACTION				
GOALS	Online:	Online:	Online:	Online:
	Offline:	Offline:	Offline:	Offline:
OFFLINE COMPONENT	1.	1.	1.	1.
	2.	2.	2.	2.
	3.	3.	3.	3.
	4.	4.	4.	4.

TIPS AND TROUBLESHOOTING:

- Keeping your database of contacts fresh and up-to-date gives you higher probability of finding new leaders through online-to-offline engagement.
- You may lose some prospects along the way, people who have changed their minds about being involved, but you've accounted for this and set goals that accommodate volunteer turnover or drop-off.
- Don't forget to follow up with people after they've committed to the next step. Not only should you remind them of their commitment, but ask if they need any support or help in order to follow through.
- Hold people accountable to keeping their commitments.
- Other leaders in the campaign can also follow up with potential new volunteers. Recruiting new leaders is a great way to keep those core leaders moving up the ladder.
- Don't be afraid to use multiple modes of communication, as you don't know which one the person prefers.
- Keep emails brief, and be specific in what you ask for.
- Send a follow-up email 2 to 3 days after the original message, as the person may have not seen the first one.

CHAPTER 10: STRUCTURING A CAMPAIGN TEAM

CHAPTER GOALS

- Establish the appropriate type of team for your campaign.
- Help you plan tactics and timeline for the next year.
- Describe the characteristics of a successful campaign team.
- Help you assess your team structure.

In previous chapters, we have identified the strategies and power that are needed within a community to create the outcomes we want. We have also discussed how to engage volunteers in our campaigns and create rungs of engagement that cultivate their skills and capacity to lead. In this chapter, we'll focus on teams, both as the essential structure within which leadership takes place, and as replicating structures of additional engagement.

The ways in which people are organized to share leadership and campaign work is critical to the success of a campaign.

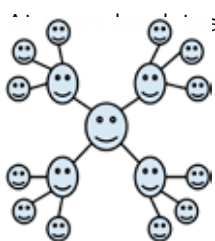
Most campaigns start with a small group of activists. These people are critical “fire-starters,” whom you will rely on to help lift a campaign off the ground. However, these individuals will soon find themselves overwhelmed unless they grow their own leadership capacity and engage more people in doing the work of the campaign. For example, a core activist focused on lobbying will end up stifling the growth of the campaign if she or he does ALL the lobbying as the campaign grows.

Think about the outcomes, tactics, and timeline for the first three to six months of your campaign. How can you execute this work so that at the end of that period, the existing base of volunteers is now leading or participating in growing teams, rather than acting as individuals? That structure usually starts with a small group implementing tactics that will engage others and bring them into a network of volunteers, activists, team members, and team leaders.

THE IMPORTANCE OF TEAM STRUCTURE

Team structures create strategic capacity—the ability to creatively plan and execute together in ways that produce a more vibrant, engaging strategy than any individual could create alone. Successful campaigns are rarely built on strict command-and-control authority structures. However, they may be ineffective beyond the local level if there is no structure for coordination and no venue for creating shared purpose. Strong campaign structures enable local decision-making and strategizing by local teams, supported by a leadership team that can provide strategic focus, common purpose, and shared resources—such as our “snowflake” model of interdependent leadership.

SNOWFLAKE MODEL OF INTERDEPENDENT LEADERSHIP



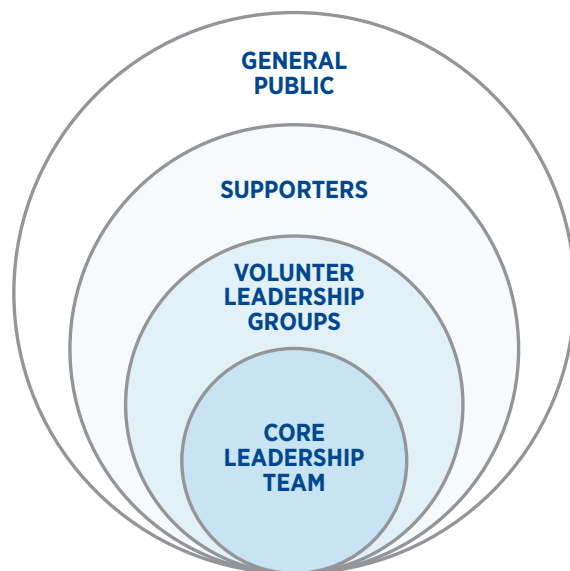
Teams require a clear charge with clear goals, and the ability and authority to strategize creatively together about how to meet those goals. The snowflake structure creates multiple points of entry for leaders, and multiple

opportunities to learn and to exercise leadership.

HOW TEAMS CONNECT TO THE BROADER COMMUNITY

We'll discuss different types of teams later, but for now, keep in mind that all teams can and should have at their hearts the objectives to draw in new volunteers and build the visibility and grassroots strength of the campaign.

The following illustration demonstrates the strategic nature of the teams as engagement and leadership development structures. There is a Core Leadership Team, which provides strategic focus, resources, and support for the Volunteer Teams, which in turn take responsibility for leading and building a community of supporters, who then take responsibility for engaging the general public, and, from this place of power, their opposition.



Ultimately, a campaign becomes more powerful as it expands this structure, recruiting and developing people from the General Public to join the Supporters circle, from the Supporters circle to join the Volunteer Leadership Teams circle, and from the best volunteers to join the Core Leadership Team circle.

WHY DON'T PEOPLE ALWAYS WORK IN TEAMS?

We have all been part of teams that have not worked well. Even with the best intentions, people can fall into factions, alienate one another, or allow all the work to fall on one person. So many of us conclude: *I'll just do it on my own; I hate meetings, just tell me what to do; I don't want any responsibility; just give me stamps to lick.* There's just one problem: We can't become powerful enough to do what we need to do if we can't work together to build campaigns and take action.

We use the word “teams,” although there are many other terms that could apply to small numbers of people working together, such as group, committee, task force, affinity cluster, band, etc. We think that the word “team” is important, and we define a team as of a group of people who work together interdependently towards a shared purpose, while taking on independent leadership roles related to a particular

role or responsibility.

Teams rise or fall together, based on the success of their shared leadership. Having a team leader is important, but that leader’s primary function is not to hold and control power. Rather, it is to help coordinate and support the work of the team, in addition to providing guidance as needed around making decisions, prioritizing, coaching, mentoring, and accountability.

The challenge, then, is to create conditions for our teams that are more likely to generate successful collaboration and strategic action. When groups of people come together, conflict will always be present. Effective teams are structured to channel that conflict in productive ways, allowing the team to achieve the goals it needs to win.

BUILDING STRONG TEAMS

Strong teams are deliberate about setting up conditions for success from the very beginning. Building from research by Richard Hackman of Harvard University and Ruth Wageman of Dartmouth University, we have found that successful teams share five factors in common:

1. Diverse People

Your team is made of diverse people. A highly effective team is made up of people from different economic backgrounds, races, ethnicities, political ideologies, skills, and opinions. When there is diversity among your team members, it can inspire robust conversations during decision-making, pushing your team to better thought-out outcomes. A good team will have a diversity of identities, experiences, and opinions, ensuring that everyone is bringing the most possible to the table.

2. Common Purpose

Your shared purpose is clear and it points you in an engaging direction. The work you have to do is readily understood, it’s challenging, it matters to your constituency, and you know why it matters. Team members should be able to articulate for others the “purpose” of your team. This brief statement includes who the team is, what they are doing together, and how they plan to do it.

3. Clear Boundaries

Your team is stable, with clear boundaries. You can name the people on it; they meet regularly. It’s not a different, random group of people every time. Highly effective teams have four to eight members. Membership of the team remains constant long enough that the team learns to work together better and better over time; each member is fully committed to being on the team and commits consistent time and effort to it.

4. Clear Roles

Your team works interdependently. Everyone should have a roughly equal share of the work based on the unique skills and resources they bring to the team, understanding that each part is necessary to adequately reach the ultimate goal. Thus, the success or failure of one will have an effect on all. One way to encourage interdependence is to have clear roles based on the work that the team needs to do to succeed. Interdependent teamwork includes: making decisions together, coordinating work, serving as a consultative team, and sharing information. Good teams will coordinate and help each other accomplish collective goals. Good team members will communicate well when they need assistance: No one is carrying out activity in a silo that is hidden from others.

5. Ground Rules

Your team has explicit expectations. Your team sets clear expectations, or ground rules, for how to govern yourselves in your work together. How will you manage meetings, regularly communicate, make decisions, and maintain commitments? Most importantly, how will you correct violations of your shared ground rules so they remain real and help you work as a team?

Teams with explicit shared expectations of each other have a much higher likelihood of achieving the results they are aiming for. Some team expectations are operational, such as, “How often will we meet?”, “How will we share and store documents?”, and “How will we communicate with others outside the team?” Others address expectations for members’ interactions with each other. Initial group ground rules guide your team in its early stages as members learn how to work together as a team. These rules are set by the team, not by one person, and can be refined through regular group review of how well the team is doing.

Without explicitly creating these ground rules, you will find that habitual ways of interacting will form on their own, and it will be much more difficult for your team to address those habits that are not helpful to your team’s effectiveness.

THREE CRITERIA TO MEASURE YOUR TEAM'S EFFECTIVENESS

Setting clear metrics and expectations, and measuring your team's effectiveness, will be critical to the success of your work. We've provided some criteria to help you. Note: If your team isn't meeting these criteria, return to the foundational blocks to reevaluate and refocus.

1. **Action:** The action work of your team matches the goals you need to meet in order to win on your campaign.
2. **Capacity:** The team is engaging others outside the team in action (i.e., building power). The team's capacity is growing as they work better together over time. The team is engaging new, diverse members, allies, and partners.
3. **Learning:** Teamwork supports individual growth and learning.

In short, you know your team is effective if the team is achieving campaign goals, building power by growing the community of people and resources it will take to meet the goals, and meeting each participant's interests by giving them opportunities and support to learn and develop.

WHAT TEAMS SHOULD WE BUILD?

The types of teams your campaign constructs are rooted in your campaign plan, and expressed in the unique talents, skills, and interests of the volunteers. Your campaign plan may say that after six months, you'll want a leadership team, a social media team, a lobbying team, and an event planning team. Two months in, you conduct a one-on-one and discover that one enthusiastic volunteer is a local business owner who is active in the neighborhood chamber of commerce. Do you continue to probe the person for skills that fit one of your existing teams? Or do you consider whether it's time to rethink your team structure?

Different types of teams serve different purposes. When thinking about a specific team's scope and role, it may be helpful to break down some general team types.

Examples of Types of Teams

1. **Tactical Team:** designed to take responsibility for a single tactic, such as a rally or a hearing. These teams are likely to be short-term, but may continue or re-group for future events.
2. **Capacity Team:** designed to deliver on a specific capacity, such as updating a website or contacting the media.
3. **Geographic Team:** Some campaigns may be geographically distributed. In that case, teams that

initially hold all campaign roles in that community, while connecting to the larger leadership team, may be appropriate.

4. **Campaign Leadership Team:** formed to build campaigns and expand leadership capacity. This team is responsible for the overall coordination of recruiting and building new teams.

ESTABLISHING TEAM CHARGE AND GOALS

Before forming a campaign team, establish a charge and a set of goals. Make sure the team's charge and goals fit into the purpose of the campaign. The team's goals refer to the specific, measurable results that can be achieved. Goals should be achievable within a short time-frame, so that the team and the local community can experience the results.

TEAM GOAL	TEAM CHARGE
- short term, measurable outcomes	- big picture
- team and community experience the results	- desired outcome for the entire campaign
- real and achievable	- may take many goals to achieve charge

A team's charge connects to the big picture of the campaign, and creates a context for the team's shorter-term goals. The charge of a social media team, for example, may include a developing a collective campaign social media presence that attracts 10,000 unique followers.

Both the charge and goals should be constructed in ways that invite the participation and engagement of others.

SUPPORTING YOUR TEAMS' SUCCESS

We've talked about the foundation of team development and the role teams play in connecting to the community and drawing in more volunteers. A final, critical piece is thinking about the resources your teams will require to feel supported and capable of delivering on their charge and goals.

Think about each of the following resources as each new team is established. Most teams will require some level of support in all of these five areas. Providing that support will help ensure that a team doesn't flounder for lack of skills or resources:

1. **Material Resources:** Money and time are provided to teams so they can do their work.
2. **Information Systems:** Information systems are in place to help team members coordinate and track their work, and access the information and data they need.

When constructing a team charge and goals, think of the “Three Cs.” Teams function best when they are:

CLEAR: created for a clear purpose; they have clear goals and objectives that are widely understood. Those who establish teams have a responsibility to make sure their team’s charge is clear.

CHALLENGING: all members, and the team as a whole, are challenged to utilize the best of their abilities.

CONSEQUENTIAL: it is clear to the team what their unique responsibility is within the organization, and they understand their significance to the organization.

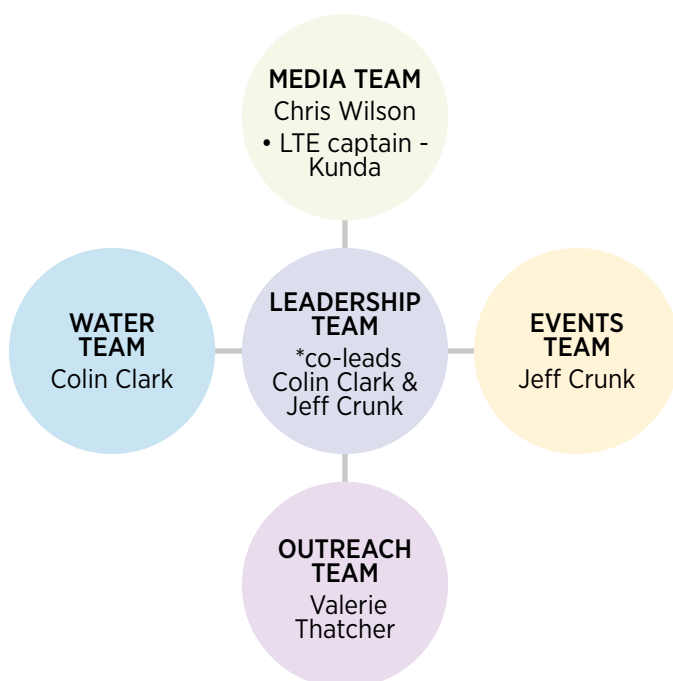
3. **Training:** Training is available to the team based on its needs.
4. **Team Rewards:** The organization and/or leadership team recognizes successful teamwork, not just the contributions of a few star players.
5. **Available Coaching:** The team leader, a team member, or someone from outside the team can serve as a “coach” and provide encouragement, ask clarifying questions, or share wisdom when questions or problems arise.

EXERCISE: STRUCTURING YOUR CAMPAIGN TEAMS

Step 1: Team Structure

As you map out your campaign plan, think about the team structure you’ll need to deliver on your strategies and tactics, while attracting new volunteers and leaders. Use the snowflake model to illustrate team connections, and think about the four different types of teams, noted earlier in this chapter.

Example of a team structure: Pacific Northwest Coal Campaign, Austin Beyond Coal:



Step 2: Team Charge and Goals

Based on the goals you’ve set for your campaign, what specific outcomes will each volunteer leadership team be responsible for achieving? How can you frame these outcomes as a clear purpose: They will organize (WHOM) to do (WHAT) by (HOW)?

Example: Each of the geographically-based teams will be responsible for organizing consumers in their community to stop buying grapes at the trend-setting local grocery store by picketing outside the store, holding [X] house meetings in every neighborhood to tell the story of the campaign, and collecting [X] new supporters who pledge to not consume grapes or grape products.

DEVELOPING TEAM ROLES: YOUR LEADERSHIP TEAM

Think about each team’s charge and goals, and consider roles each member of the team can play. Fill in the chart, and be specific. Think about why this is a good role for a leader, and what skills a leader can bring to the role. What experience and talents does each team member have, and what specifically do they want to learn? Use the Sample Roles Worksheet we’ve included to chart basic information and needs.

Based on the responsibilities this team will take on, what roles and responsibilities will you recommend? What support will you provide to these teams to set them up for success?

SAMPLE ROLES WORKSHEET

ROLE	RESPONSIBILITIES	SKILLS A VOLUNTEER WILL NEED OR TESTS TO PASS TO QUALIFY FOR THIS ROLE	WHAT WE NEED TO CREATE TO SUPPORT THIS ROLE (DATA, TRAINING, ETC.)

DEMYSTIFYING MONITORING, EVALUATION, AND LEARNING (MEL)

By Dan Cramer, Lindsay Hanson, Mark Bettinger, and Kim Kohl

INTRODUCTION

What the hell is MEL? That is a totally appropriate question for any organizer to ask. MEL, (which stands for Monitoring, Evaluation, and Learning), is a term often employed by professional evaluators, funders, and data experts. MEL may seem to have little to do with our day-to-day work of organizing for social and political change, but it is an increasingly critical element of effective grassroots organizing and movement building. We like to think of MEL as a systematic approach to *continually learning from our work to achieve tangible and powerful organizing outcomes*.

MEL IN PRACTICE

After a string of 31 consecutive electoral defeats, the same-sex marriage movement achieved unprecedented success, winning four successful ballot campaigns in 2012. At the center of these victories was a marked change in organizing strategy. Instead of the traditional (and transactional) 30- to 60-second conversations on the phone and at the door, campaign organizers embraced 8- to 10-minute conversations with voters. This new, relational approach was critical to the success of these campaigns, as longer conversations proved effective in persuading deeply conflicted voters. But this change in organizing strategy did not occur by happenstance; it emerged through data-driven learning. The new approach was the result of a clearly articulated, research-based set of assumptions, intentional testing, constant monitoring, regular refinements, and a commitment to sharing lessons across the movement. It was a great example of MEL in practice.

Similarly, in his groundbreaking, must-read book for organizers, *The Victory Lab*, Sasha Issenberg details how the increased use of data and randomized field experiments transformed the 2008 Obama presidential campaign. In the must-win state of South Carolina in 2008, Issenberg describes how Obama field guru Jeremy Bird used data to usher in a new approach to organizing:

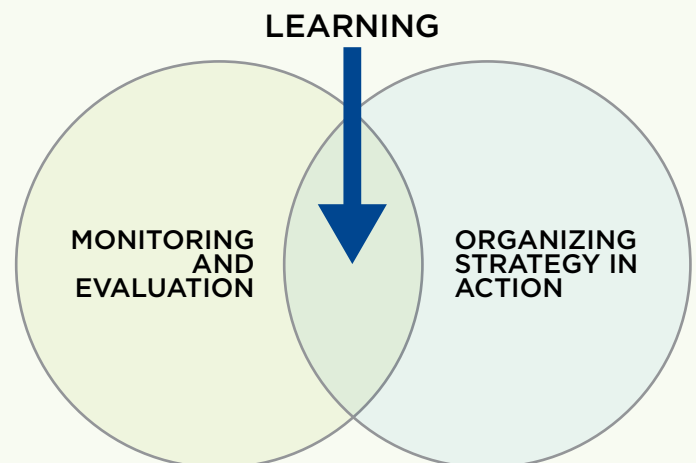
“For too long, Bird thought, field organizers had collected data on the volume of contacts their teams had made largely for the purpose of impressing campaign higher-ups in memos... But the metrics-obsessed Obama campaign realized that these figures were not particularly insightful. Who cared about how many calls you placed if most of them went unanswered? Or how many doors you knocked if they belonged to voters outside your target universe?

When forced to organize in barbershops and salons, however, Bird’s field staffers were able to efficiently deploy volunteers...[and] were reaching people not at their homes but at other places where they gathered.”⁷⁰

This, too, is a terrific illustration of MEL in practice. The Obama campaign’s focus was on achieving meaningful *outcomes*—in this case, reaching and persuading the right voters in the right way—rather than simply generating *outputs* in the form of lots of phone calls made or doors knocked on. The Obama campaign used analytics and testing to determine that they could better reach the right voters at the places people gathered in their communities, because it both increased the contact rate and allowed them to find more of their targets in concentrated locations.

WHY MEL MATTERS

As organizers, we know that people equal power, and that grassroots power helps drive the climate movement. Unfortunately, knowing this is not sufficient. We need to be able to prove it—to funders (who are often skeptical of investing in power-building efforts), to the leaders of our organizations (who allocate resources), to our allies (who might be more interested in other strategies), and to activists and volunteers (the people we are asking to trust us about the difference their time can make).



MEL enables us to assess our effectiveness in an ongoing way, to prove that we are increasing power and employing sound organizing strategies that strengthen our efforts to advance climate solutions. But MEL is more than an exercise in tracking and counting numbers.

70 Sasha Issenberg, *The Victory Lab: The Secret Science of Winning Campaigns* (Crown Publishing Group, 2012), 280.

The reason to monitor and evaluate is so that we can *learn*—from both successes and failures. It is this commitment to constant learning that will make us better, smarter, more forward-thinking organizers. Put another way, learning is at the heart of increasing our power to achieve meaningful outcomes.

Ever had a big idea for an activity or even a whole campaign that you could not get your organization to approve? If you employ MEL, you will likely have better luck making your case. MEL allows organizers to:

- Track performance against plans, so we can make data-driven adjustments
- Test assumptions and calculate the cost per outcome
- Strengthen coordination between allies
- Demonstrate our effectiveness
- Achieve our goals
- Sustain ourselves

The last two points are particularly important. We know that the path to implement climate solutions is a long and difficult one. For the first time in its history, the coal industry is fighting for survival, intensifying its opposition at every level. The coal industry has vast resources. That means we have to work smarter. We cannot afford to burn ourselves out—an inherent risk in all long-term, social change work. MEL can help us use data to learn from and focus on the most effective approaches to organizing. In this way, MEL is a valuable tool to keep us energized and creative, so we are well positioned to take on such powerful adversaries.

ABOUT THIS CHAPTER

The remainder of this chapter is divided into two sections: a brief overview of relevant terminology, and a more in-depth exploration of the elements that make up the five-step MEL “cycle.” We will examine each of the five steps, as well as the role that organizers can play in shaping and participating in MEL, rather than being passive observers of the process. We will use case stories to illustrate how various organizations have employed MEL to strengthen their organizing efforts and campaigns. Monitoring, evaluation, and learning have applications that transcend organizing, but for the purposes of this chapter, our focus is on MEL’s practical relevance and benefit to organizers.

GET TO KNOW MEL: UNDERSTANDING THE TERMINOLOGY

Because MEL has its roots in the evaluation field, it can sound more complicated and removed from organizing than it actually is. Here are some terms that will make it easier to understand:

Monitoring: The process of tracking, analyzing, and reviewing the data collected as organizing work happens.

Evaluation: Points in time used to take stock, or formally appraise, organizing efforts. Evaluation provides an opportunity to revisit assumptions and determine which organizing strategies worked.

Learning: Using data to develop sound strategies to build power and achieve meaningful organizing outcomes. Agreeing to put learning at the center is critical for organization-wide adoption of MEL practices.

Activities: Actions taken. In this context, activities refer to the organizing tactics or interventions that are implemented to advance a specific outcome or outcomes. The immediate results of activities are outputs.

Outputs: Immediate or short-term results of the activities that an organizer undertakes. Common organizing outputs include the number of phone calls made, the number of participants who attended the rally organized, and the number of people who signed a petition. Outputs can also include the adoption of new policies, rules, or regulations. Collectively, outputs contribute to accomplishing outcomes.

Outcomes: Longer-term results of an organizing effort. Outcomes represent the difference that our organizing activities—and outputs—have made and the “real world” effects of the work.

Qualitative Data: Descriptive information that can be observed and analyzed, but not precisely measured (e.g., stories that organizers collect and share, interviews with leaders, community members, etc.).

Quantitative Data: Numerical information that can be measured and counted (e.g., number of people contacted, number of bills adopted, etc.).

Return on Investment: A fancy way of describing efficiency, or the benefit gained as a result of our organizing work.

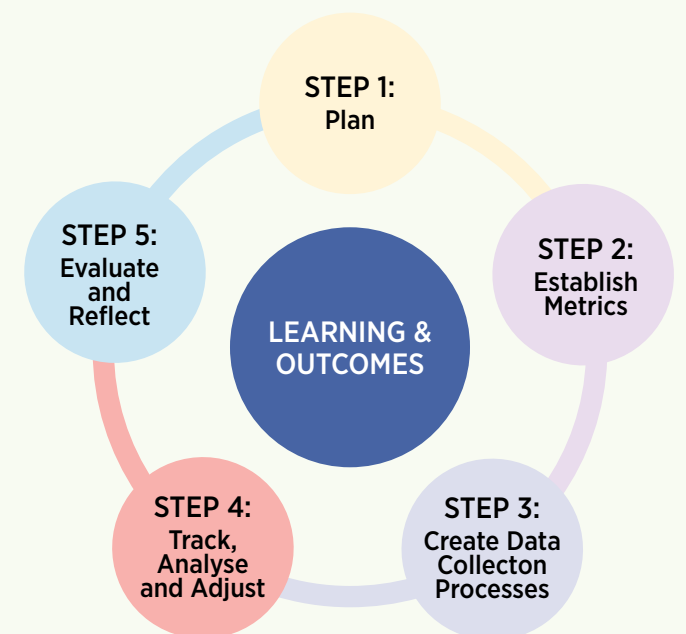
Theory of Change: An organization’s articulation of the results it must achieve to be successful and how it will achieve them.⁷¹

71 This definition was adapted from the following blog post by Matthew Forti of the Bridgespan Group: http://www.ssireview.org/blog/entry/six_theory_of_change_pitfalls_to_avoid#bio-footer.

MAKING MEL WORK FOR YOU: THE FIVE-STEP CYCLE

Emerging best practices in the evaluation of organizing and social change efforts put data-driven learning and outcomes at the center. Instead of a one-time occurrence, MEL is a continuing process that helps organizers become more effective, efficient, and innovative. Successful grassroots-driven campaigns and organizing efforts treat MEL as a cycle that includes five inter-related steps:

THE MONITORING, EVALUATION, AND LEARNING CYCLE



STEP 1: Plan

The MEL cycle kicks off with the creation of plans that outline what an organization hopes to do. While there are many elements of effective organizing plans, we highlight three components because of

their particular relevance to monitoring and evaluation: the theory of change, short- and long-term results (outputs and outcomes), and strategies to achieve outcomes.

Theory of Change: A theory of change addresses the following questions: Whom are you seeking to influence or benefit? What outcomes are you seeking to achieve? When will you achieve those outcomes? How will you and others make those outcomes happen? Where and under what circumstances will you do your work? Articulating the theory of change during planning is important, because it informs what you monitor and evaluate. Answering these questions and clarifying assumptions will help you later choose the most relevant data to track and analyze. That way, you will be better positioned to assess whether the strategies and

activities employed put you in the best position possible to achieve desired short-term results and longer-term outcomes.

For example, in the effort to replace coal with clean energy, the Sierra Club created a “bottom-up, top-down” strategy that reflected the following theory of change: generate public pressure at the local level (bottom-up) while defending and creating strong EPA rules (top-down). The organization’s assumption was that this was possible because the Sierra Club has media, organizing, and litigation capacity around the country. From this theory of change, the organization has been able to identify appropriate metrics to track and analyze progress.



Outputs and Outcomes: To get the most benefit from incorporating MEL into your work, it is also important to clarify what you expect to accomplish and clearly state the desired results. Some results may be externally focused (e.g., changes in the world you intend to achieve), while others are internally focused (e.g., changes in your organization you intend to achieve). Some desired results—make 10,000 calls to legislators and pass legislation, for example—will be shorter-term in nature (i.e., an output). Other desired results—like the megawatts of clean energy coming online—will be longer-term in nature (i.e., an outcome). It is worth reinforcing that outcomes are not the same as outputs. Making 10,000 calls is not an outcome. Confusing outcomes with outputs is a trap that organizers routinely fall into, especially given the day-to-day pressures that accompany our work. But it is critical to remember that the desired long-term results or outcomes should anchor everything we do.

Strategies to Achieve Outcomes: Once you have clarified your theory of change, the next step is to define *how* you will achieve desired outcomes. While some intuition often goes into determining organizing strategies, to be more effective, efficient, and forward-thinking, we have to be willing to put those strategies to the test. Data can help us ascertain if we are choosing the right approaches to realize the long-term results we want.

STEP 2: Establish Metrics

Establishing metrics is the second step in the MEL cycle. Choosing metrics will help you figure out whether your assumptions were correct, if you are on track to achieve desired outcomes (= effectiveness), and what cost was involved in achieving those ends (= efficiency). Consider the following questions

when choosing metrics: What can you measure that are the best indicators of performance? How many or how much will be required to demonstrate success?

For instance, if the results you would like to achieve relate to leadership development, cultivation of geographically distributed grassroots teams, participation among activists, or diversity of grassroots relationships, then the metrics and targets could include some combination of the following:

- Number of one-on-one meetings and resulting leader commitments
- Number of petition signers
- Number of people who take action online
- Number and diversity of partnerships, and actions taken
- Number of events hosted with partner organizations

If other results you would like to achieve include some form of systems change, then metrics and targets could include:

- Number of favorable bills introduced
- Number of programs initiated or altered
- Number of decision-makers supporting or citing campaign asks
- Number of policymaker and candidate education efforts completed
- Number of organizing events executed that are directed toward the legislature

Recent studies have shown that having a blend of breadth and depth (i.e., the development of citizens as leaders and engagement of many people in collective action) is integral to effective organizing. According to Hahrie Han, organizations that successfully develop activists:

“Organize—build relationships, cultivate interests and motivations, and teach leadership and other skills...‘the transformational work of building democratic citizens’—and they also mobilize—maximizing numbers by activating people who already have some latent interest.”⁷²

As organizers, the metrics we establish and the data we track will help us assess our progress in building power and achieving our desired outcomes. With this in mind, we offer some guiding questions to help you choose powerful metrics to measure breadth and depth:

Breadth = How many participants? How are they engaged?

Depth = How many leaders? How are they engaged?

Networks = How many partners? How are we working together?

Intensity = How much action taken? How much growth in actions over time?

Power = How much leverage with decision-makers?

STEP 3:
Create Data
Collection
Processes

The third step in the MEL cycle involves identifying mechanisms to track your data. It is important to plan how data will be collected and stored, and how that information will be accessed. It is not just

a matter of putting data into a system or tracking mechanism; we enter information so we can learn from it. As organizers, we should care just as much about entering information as we do about getting that information back out.

MEL works best when organizers and frontline allies help shape the way data is collected, stored, and used to refine strategy in action. A collaborative approach to data collection helps ensure that organizers, activists, and volunteers learn together. The involvement of activists and volunteers in the data collection process can serve as another way to deepen relationships and affinity among supporters and grassroots stakeholders for your organization or cause.

The good news is that you do not need to have fancy data management tools or a tech wizard on staff to collect and track data effectively. Some well-considered spreadsheets can suffice for smaller-scale efforts. Choose metrics carefully and set reasonable targets (small in number), so they are easy to monitor. See the sample illustration of what data collection could look like.



⁷² Hahrie Han, *How Organizations Develop Activists: Civic Associations and Leadership in the 21st Century* (Oxford University Press, 2014), <http://www.challengestodemocracy.us/home/first-chapter-how-organizations-develop-activists-by-hahrie-han/#sthash.IRyiPDQZ.dpbb>.

DESIRED ORGANIZING OUTCOME	OUTPUT	METRIC	TARGET	TRACKING METHOD
Greater leadership capacity	5 Volunteer Team Leaders	One-on-ones	50	Online relationship management system
Increased diversity of partnerships	5 New organizational partners led by Latinos and working in Latino communities	Co-hosted events	2	Google document

While most metrics we have described are aimed at measuring quantifiable results, it is worth noting that quantitative data has its limitations. Creating processes to collect a combination of qualitative and quantitative information can improve your ability to monitor, evaluate, and learn because it ensures that the limitations of one type of data are balanced by the strengths of another.

Lastly, how you use and track the application of publicly available data in your organizing effort—voter files, demographic information, and more—to target, persuade, and identify more supporters, or to expand your network, should also be considered. The private sector has been using “big data” to be more predictive for decades (think credit scores, Netflix, etc.). Groups that make up the climate movement can also test the usage of this information to take on powerful opponents and achieve goals.⁷³

STEP 4: Track, Analyse and Adjust

The fourth step of the MEL cycle is the most time-intensive. At this stage, the monitoring aspect of MEL truly gets underway. As you implement your organizing plan, regular analysis and check-ins can help you assess progress and ensure your organizing effort is moving in the right direction.

The findings and insights that emerge through tracking and analysis inform real-time modifications to your organizing plans. Tracking and analysis can be used to make adjustments at both a high level (e.g., Do you have

the right strategies and mix of depth, breadth, relationships, and intensity to achieve desired outcomes?) and at a more granular level (e.g., Do you need more or fewer one-on-ones to recruit a team leader?).

To illustrate the value of this step to organizers, let's look at an example from the Washington Community Action Network (a Center for Community Change Community Voting Project partner). In 2014, the Washington Community Action Network—a mid-sized organization—conducted a range of nonpartisan voter registration and turnout activities. The organization's canvassers used handheld technology to download walk lists, synchronize data collected in the field, and generate daily reports. By tracking and analyzing the information collected through electronic devices daily, the organization could make real-time, data-driven adjustments to its operation, encouraging more people to register and vote. In fact, regular tracking and analysis enabled the Network to improve its contact rate with voters at the doors from 16 percent to 35 percent.⁷⁴

STEP 5: Evaluate and Reflect

The final step of the MEL cycle before it resumes again involves a combination of evaluation and reflection. Although tracking and analysis will inform real-time adjustments to organizing efforts, the evaluation part of MEL represents a more formal pause, sometimes with the help of a third-party evaluator. It does not exclusively happen at the end of the cycle, but at a minimum, you should evaluate at the



⁷³ Data of this sort is available through the following resources: America Votes, Catalyst, and State Voices.

⁷⁴ This example was adapted from an internal report prepared by the Washington Community Action Network for the Center for Community Change in November 2014.



conclusion of each organizing effort. The findings from this process should yield valuable insights about whether you achieved your desired short-term results and longer-term outcomes, what worked and what did not, and why.

What is learned through evaluation of the data collected can also be used to acknowledge progress, celebrate accomplishments, and confront and understand the wisdom in failures. To achieve climate solutions, we are going to win sometimes and lose sometimes. Although many organizations pay lip service to reflection, rarely do they dedicate time and resources to it. And that it is a big mistake. Creating time and space to contemplate findings, reflect, and restore is essential to maintaining the energy and enthusiasm of grassroots stakeholders, and vital to the sustainability of the climate movement.

CONCLUSION: LOOKING AHEAD

MEL equips us to be more effective, efficient, and forward-thinking organizers. It pushes us to be clear about what it is that we are trying to achieve in both the shorter and longer term, and what strategies and activities we think will best further our aims. Then we can test those assumptions and make real-time adjustments that are grounded in data and sound evidence.

The truly transformative work that has been done around marriage equality and the landmark Obama campaigns illustrate that the most successful organizations and campaigns are grounding themselves in MEL and data-driven decision-making. The next frontier is for us to apply this same type of rigor to long-term power and movement-building efforts.

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CHAPTER 11: MONITORING, EVALUATION, AND LEARNING (MEL)

CHAPTER GOALS

- Provide an overview of how to use monitoring, evaluation and learning (MEL) processes to improve the practice of organizing to win campaigns that help protect the planet.
- Give practical examples of MEL.
- Provide tools for implementing MEL as a practice.

We've covered a lot of ground in the manual to this point. If you've been imagining a campaign plan coming together as you've been reading, you may now be looking at it and wondering how you can be sure you'll hit the desired outcomes. A thorough assessment of the community and targets, a developing network of partners, a strong written plan, and an initial core of potential leaders are great pieces to have in place. But ensuring success depends just as much on the learning and changes you'll make along the way. In this chapter, we'll discuss MEL as a paradigm for the consistent, thoughtful evolution of your campaign over time.

Introduction

Many of the problems in the world seem too big and too hard to tackle. What are the solutions for racism, poverty, and climate disruption? When we break them down into actionable issues, overwhelming problems can be viewed in solvable pieces. Then, one step at a time, we can make concrete changes in people's lives and create momentum to tackle the next issue—working toward solutions for the big, overwhelming problem piece-by-piece.

This chapter provides both key concepts and real-life tools to integrate MEL into your campaigns. A MEL cycle enables you, as a grassroots organizing campaign leader, to continuously learn and improve both the efficiency and effectiveness of the campaign. It also creates tools for transparency and accountability as we engage more leaders and activists into our work, a critical component in building a climate movement.

Key Values

Transparency: enables all team members to know how much power we are building and to engage in the conversation about how we will get better.

Accountability: creates shared purpose and commitment across the team as progress is tracked towards agreed-upon, measurable actions.

Learning: is shared with the larger team so we can be efficient and effective with our resources, and build better leaders.

By engaging in ongoing monitoring, evaluation, and learning, we build better leaders, taking advantage of everything we learn as an organization to build an even larger movement.

MEL IN PRACTICE

The following examples show how we use monitoring, evaluation, and learning in the real world.

Retiring Coal

Retiring a coal-fired power plant is no small feat. We

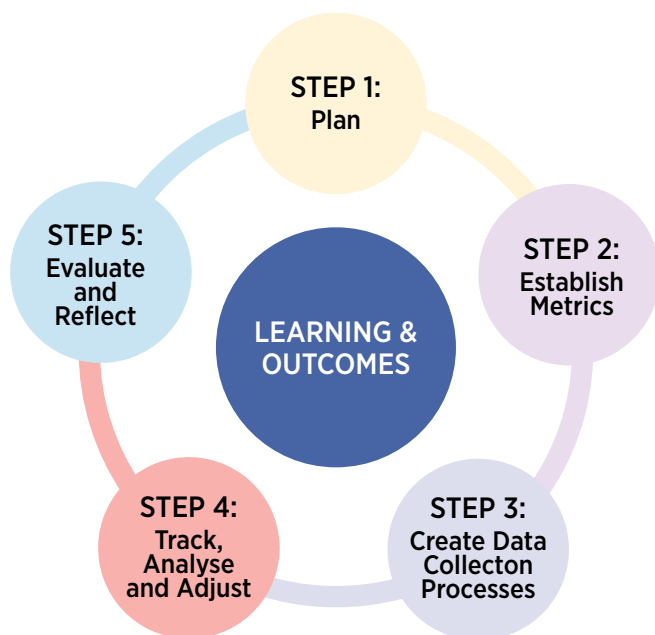
used monitoring, evaluation, and learning in our 2014 campaign to retire the North Omaha coal plant. The coal plant was run by an eight-member, publicly elected board. We theorized that public pressure would move a majority of the board to call for retirement of the plant. Given the deep-seated respect the community had for public power and the board, our goal became to form strong community relationships with the board. We developed a qualitative tool to collect information from meetings with board members and measure the depth of relationships we built with them. We used this to assess our progress as we moved, one board member at a time, to gain support for closure of a dirty coal plant that was harming the community. Today, the North Omaha coal plant is on path to retirement, by a unanimous decision of the board.

Large-Scale Mobilization for Climate

The 2014 People's Climate March in New York City was a tremendous opportunity to learn about building capacity through a mass mobilization event. The Sierra Club wanted to learn how effective mass mobilization events are in building long-term capacity and leaders for a more diverse climate movement. Our team followed the five-step MEL cycle before the event. The results were both enlightening and validating for the engagement organizing model. For instance, the activists who participated in the march by making the commitment of time and money to ride a bus from another community were significantly more likely to get involved with climate work locally after they returned home.

HOW TO CARRY OUT THE FIVE STEPS OF MONITORING, EVALUATION, AND LEARNING (MEL)

You learned about the principles of the MEL Cycle in the previous chapter. Now we will look at concrete ways to put MEL into practice.



1. Make a Plan

First, you have to figure out what your goals are and what you want to learn. In a campaign, our goals always correlate to our theory of change—or how we are building power to achieve our desired outcomes. For example, if the theory of change is that the margin of victory in the election is 4,500 voters, then engaging 5,000 voters within six months will lead to victory.

Your goals for Monitoring, Evaluation, and Learning should include:

- Short-term goals (e.g., “Will a 100-person event raise the profile of the candidate?”)
- Longer-term capacity (e.g., “Are 50 percent of those activists staying engaged throughout the six-month period?”)
- Strengthening networks (e.g., “How diverse are your networks? Are you showing up to support 30 percent of your partner organization’s actions?”)

You will want to evaluate your goals in both qualitative and quantitative ways. Examples of goals might include:

- Get 100 people to turn out for an action:
 - How closely did those 100 participants reflect the demographics of the larger community?
 - Was the group representative of the community’s power?
- Build stronger relationships with five organizations in three months.
- Use resources cost-effectively.
- Have a secondary target speak in favor of your issue.

The beginning of this goal-setting process is also a great time to figure out *what* you want to learn. For example, if you are wondering about the effectiveness and efficiency of an organizing tactic, you could consider factors such as the best location to collect postcards or hold a meeting, or the best way to enable leaders to recruit people to come to events.

You can also examine the cost-effectiveness of an action. For example: Does providing buses increase turnout without breaking the budget?

Over time, we learn and develop best practices that make us more effective and efficient as a movement.

2. Establish Metrics

We are continuously learning which metrics or indicators are the right ones to measure. By testing new assumptions, we can track progress and determine if we are on the road to meeting our goal, or, if we have to make adjustments.

Earlier in the manual, we discussed the factors that go into building power to create the concrete change we want to see in the world:



These metrics help us see the larger picture of how we are building power, not only to win in the short term, but also to create long-term change.

Every situation is different, so what might be the right indicators in one location may be completely different in another. For example if our goal is a 500-person rally,

QUANTITATIVE: Analysis that focuses on numerical comparisons and statistical inferences. (Quantitative = Quantities).

QUALITATIVE: Analysis that uses unstructured or semi-structured techniques to understand underlying reasons, opinions, or motivations. (Qualitative = Qualities).

and keeping in mind the “Law of Halves,” then the metrics might be:

- Number of one-on-one meetings
- Number of phone bankers
- Number of RSVPs to an event

However, if our goal is to have the local city councilperson support our issues, then the metrics may be:

- Number of one-on-one meetings
- Number of petitions signed to the city councilperson
- Number of people meeting with the city councilperson

It is also critical to choose the right level of indicator. We don’t want it to be too general, such that it doesn’t give an accurate predictor of what is happening, but we also don’t want it to be so overly specific that we are measuring more things that we have time to measure.

Some good questions to consider when figuring out the right indicator include:

- What measurements are the best indicators of performance?
- How many or how much will be required to demonstrate success?

Another important factor in establishing metrics is to be aware of the diversity and culture of the communities we are working with:

- Do these measurements reflect the values of the community?
- Do they make sense to our partners, and to lead volunteers and activists?

3. Create Data Collection Processes

Once we establish the right metrics, the next step is to figure out how we want to collect this information. Is there an automated way to do it, or will humans be involved? You may have access to tracking software, such as Salesforce or Homegrown, or you could use a basic spreadsheet, such as Microsoft Excel.

We want our data-collecting systems to be as simple and our data as accurate as possible. If in doubt, err on the side of the simpler and more direct data sources.

Statisticians use the term “garbage in, garbage out.” It refers to the idea that if your underlying data is inaccurate, then the analysis of that data, no matter how legitimate it looks, will only compound the inaccuracies.

Questions we should ask when creating a data-collection tool include:

- Will we have enough time to fill this out?
- Do all members of the team understand what information goes where?
- Are there any automated tools we can use, like auto-dialers or RSVP emails, to generate accurate results?
- Does this data reflect the questions we wanted answered?

Data collection can be very simple, and can be shared between members of an organization using free, on-line tools such as Google Drive. The collection system should be something that is easy to explain for the end users, and ideally, that adds value to their work. Part of this process is to figure out who is collecting the data, how often they are collecting it, and when you want to look at it.

SAMPLE DATA-TRACKING SHEETS

Here are some examples of simple data-tracking sheets you can make. The data you will track will depend on what you want to measure and what you want to achieve.

a) Automated Phone Dialer Results

Name	Phone #	City	Will attend hearing	May be interested	Needs more information	Left message

b) Online RSVPs (to an email alert)

Name	Email	City	State	Zip	Phone	Will attend	Wants to volunteer – share info	Do you want to share anything with organizers?

c) One-on-One Meetings

Name	Contact info	Referred by	Biggest concern for the community	Willing to volunteer	Volunteer interests	Influence on target (range 1-4)	Strengths

d) Movement of a Decision-Making Body

Name of board member	Dates of contact	Who contacted	Date of meeting	Names of attendees	What they are saying about coal plant's future	Their understanding of health issues/ effects	How much do they defer to their staff?	What they think of us and our efforts	What they think of climate disruption	Follow-up

e) Tracking Multiple Actions

Past actions are great predictors of future actions. Keeping tracking documents up to date with contact information and what actions people have taken over time

will help you create better lists for future engagement with those people.

Grasstop name	Organization	Title or role	Contact	Action 1	Action 2

4. Track, Analyze, and Adjust

Once we have the data collected, we can use it to see what is working and where we have to adjust. This is the time to have a conversation about how we are building power to meet our goals. The questions we ask should consider the metrics in our goals, as well as our formula of breadth, depth, networks, and intensity that contribute to building power:

Some questions we might ask during the buildup to meet a goal:

- Are we on track to meet our goals?
- How should we be allocating our resources to meet our goals?
- Based on this information, how should we proceed to gain support of our target?
- Do any goals need to be adjusted?
- Do we have the right mix of depth, breadth, relationship, and intensity to move the target?
- How will we adjust these goals and how will we measure that change?

At the end of a goal period, we may want to take some time to reflect on our learning:

- Where was it most productive to canvass?
- What was the best location for a meeting?
What was the best way to enable leaders to recruit others for events?
- How do we need to adjust, and how will we measure the adjustments?

5. Evaluate and Learn

This step is critical to the MEL cycle, but is often lost in the urgency of the next climate action. Successful evaluation processes need to include the following components:

- Dedicated time and place for the evaluation
- Key stakeholders are present
- Data, both qualitative and quantitative, that was collected to test to our assumptions
- Clear agenda and mechanism for the best practices and learning to be distributed and tested further

MEL CYCLE PLANNING TEMPLATE

STEP 1 - PLAN

What is your theory of change?

What do you want to learn?

STEP 2 - ESTABLISH METRICS

What metrics do you need to collect to test your theory?

STEP 3 - CREATE A DATA COLLECTION PROCESS

How will you track the information (e.g., in Google Drive or some other system)?

What information goes where?

STEP 4 - TRACK, ANALYZE, ADJUST

How do we efficiently get data into the tracking sheet (data-entry)?

How will the data be used and shared (data reports)?

- What information needs to be shared?
- Who needs to get the information?

STEP 5 - EVALUATE AND REFLECT

What do you need to do to know if your theory is on track?

GLOSSARY OF KEY TERMS AND ACRONYMS

Campaign: A series of planned actions that take the resources you currently have, or can gain access to, and turn them into the power you need to achieve an outcome and build long-term strength.

Campaign Plan: A written document that maps out key elements of a grassroots campaign and guides the subsequent work to achieve specific outcomes.

Community Mapping: A process to build knowledge of a community. It involves both traditional research methods to understand facts and numbers, as well as qualitative research to understand relationships and dynamics.

DEI (Diversity, Equity and Inclusion): The title of a strategic priority of the Sierra Club designed to change the organization's culture and structure to more closely reflect the makeup of communities where we operate, and to better contribute to a larger movement for environmental and climate justice.

Diversity: Psychological, physical, and social differences that occur among any and all individuals, including, but not limited to: race, ethnicity, nationality, religion, socioeconomic status, education, marital status, language, age, gender, sexual orientation, mental or physical ability, and learning styles. A diverse group, community, or organization is one in which a variety of social and cultural characteristics exist (The National Multicultural Institute).

Equity: The guarantee of fair treatment, access, opportunity, and advancement, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. The principle of equity acknowledges that there are historically underserved and underrepresented populations and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups (U.C. Berkeley Initiative for Equity, Inclusion, and Diversity).

Evaluation: Points in time used to take stock of, or formally appraise, organizing efforts. Evaluation provides an opportunity to revisit assumptions and determine which organizing strategies worked.

Grasstops: Community leaders and influencers—individuals whose choices and decisions are likely to sway a range of individuals and groups in the community.

Inclusion: The act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people (U.C. Berkeley Initiative for Equity, Inclusion, and Diversity).

Learning: Using data to develop sound strategies to build power and achieve meaningful organizing outcomes. Agreeing to put learning at the center is critical for organization-wide adoption of MEL practices.

MEL (Monitoring, Evaluation, and Learning): A systematic approach to continually learning from our work to achieve tangible and powerful organizing outcomes.

Monitoring: The process of tracking, analyzing, and reviewing the data collected as organizing work happens.

Movement: Sustained groupings of organizations, affinity groups, leaders, and networks that share values, a common narrative, a deep and broad base, and a long-term commitment to change.⁷⁵

NPLA (National Purpose, Local Action): A joint research project of Marshall Ganz and the Sierra Club, exploring the roots of volunteer engagement and leadership.

Outcomes: Longer-term results of an organizing effort. Outcomes represent the difference that our organizing activities—and outputs—have made and the “real-world” effects of the work.

Outputs: Immediate or short-term results of the activities that an organizer undertakes. Common organizing outputs include the number of phone calls made, the number of participants who attended a rally, and/or the number of people who signed a petition. Outputs can also include the adoption of new policies, rules, or regulations. Collectively, outputs contribute to accomplishing outcomes.

Power Map: A visual representation of decision-makers and how they are connected to others in terms of power and influence.

Primary Target: The individual whose decision can result in the campaign achieving an outcome. Targets are always named individuals, not institutions, corporations, committees, or other groupings.

Privilege: Power and advantages benefiting one group that are derived from the historical oppression and exploitation of other groups (University of Maryland).

SWOT (Strengths, Weaknesses, Opportunities, Threats): A paradigm for assessing the current state of a campaign effort. Each of the four elements is listed and participants brainstorm items under each heading. The development of a community map is an essential foundation for a good SWOT analysis.

Secondary Target: An individual with significant ability to influence decisions of the primary target.

Strategic Plan: A written document that lays out the vision and priorities for an organization's growth and development.

Team: A group of people who work together interdependently toward a shared purpose, while taking on individual leadership related to a particular role or responsibility.

Theory of Change (ToC): An organization's articulation of the results it must achieve to be successful and how it will achieve them.

75 Manuel Pastor, Jennifer Ito, and Rachel Rosner, “Transactions, Transformations, Translations: Metrics That Matter for Building, Scaling, and Funding Social Movements,” (University of Southern California, October 2011), http://dornsife.usc.edu/assets/sites/242/docs/transactions_transformations_translations_web.pdf.

APPENDICES

- Appendix I – Campaign Planning Matrix Template
- Appendix II – Developing Your Campaign Narrative (Worksheets and Tips)
- Appendix III – Sample Community Mapping Analysis

APPENDIX I – CAMPAIGN PLANNING MATRIX TEMPLATE

This matrix is used by the Sierra Club to plan and implement campaigns. Sierra Club organizers and volunteers should use this format in campaign planning efforts. Other groups and organizations may want to modify it to fit their specific needs.

SIERRA CLUB CAMPAIGN PLANNING MATRIX TEMPLATE

A. Long-Term Vision

A vision is an aspirational description of what your organization or campaign would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action. (Source: www.businessdictionary.com/definition/vision)

What is the long-term vision for your campaign?

B. Values

Values are the important and lasting beliefs or ideals shared by the members of a culture about what is good or bad, desirable or undesirable to that culture. *Values* have major influence on a person's behavior and attitude, and serve as broad guidelines in all situations. (Source: www.businessdictionary.com/definition/vision)

What are the values that will guide your campaign work?

C. Theory of Change

A theory of change is the description of why and how we can turn our resources into the power to win.

What is your theory of change?

D. Conservation/Campaign Goals

1. **Goal for Environment:** What is the “big” visionary goal of this campaign?

Example: Beyond Coal’s goal is to stop coal’s contribution to global warming by 2030 by eliminating this largest, single source of CO2 pollution in the United States and avoiding the worst effects of human-caused climate change on communities and species.

2. **Specific Campaign Outcome:** What is the specific outcome that your campaign will work to implement to reach the overall goal?

Example: Stop new coal projects by challenging everyone in every way.

3. **Interim Milestones:** What are the specific, interim milestones that your campaign will work to achieve?

Example: Short-term milestone (1 year: Stop the proposed Desert Rock coal plant), medium-term milestone (5 year: No new coal power in utility plans), and long-term milestone (10 year: Retire existing coal plants).

E. Power-Building/Organizational Goals

As we implement the campaign, we want to build the grassroots power of the Sierra Club so that we can be successful in this campaign as well as future Sierra Club conservation campaigns.

1. **Quantify how many people you will need.** For each field deliverable shown, quantify what you believe it will take to “win” on the campaign goals:

Number of Team Leaders: _____

Team Leaders are those volunteers who are responsible for recruiting, guiding, and leading a team of approximately three to eight other team members. These volunteers commit 5 to 10 hours a month to a short-term and/or ongoing effort.

Number of Teams: _____

Number of Participant Activists: _____

A participant activist is a person who has participated in at least one activity within the past year that took at least 2 hours of time. Examples of these activities include: participation in a phone bank or neighborhood walk, attendance at a rally or hearing, etc. This should be the broadest set of activities where a volunteer takes some in-person action during the course of the year.

2. **Consider Diversity, Equity, and Inclusion (DEI)**

To develop your DEI plan of action, do an analysis of challenges and opportunities relative to diversity, equity, and inclusion. Discuss the diversity component of the campaign with your campaign leaders

for input and advice before you finalize actions or strategies. *Note that staff is expected to participate in a diversity or anti-racism training during the year.*

- How will diversity, equity, and inclusion be advanced in this organizing campaign?
- What actions or strategies will further our DEI goals in the context of achieving the outcomes of this campaign?
- Describe concrete DEI steps you will take.

3. Identify Strategic Partners

- Identify current strategic partners. Include the name of the organization, the contact person, phone number, email address, and strength of the relationship. If you have already created a list in the database, please update it. If you have not yet entered strategic partners, their contact info and strength of relationship in database, please do so.
- Identify your priorities for expanding diversity in coalitions, partnerships, or relationship building. What new groups are you seeking to engage?

F. Target Selection and Power-Mapping

1. Primary Decision-Maker Targets

Who is the decision-maker with the power to make the needed decision? (A decision-maker is always a person or persons, not an entity).

*Example: Acting EPA Regional Administrator
Laura Yoshii.*

2. Power Mapping

Develop a “Power Map” (see Chapter 6) to assess the people who have greater (and lesser) influence on your primary target decision-maker(s). Include: other public officials, other movers and shakers in the community, funding sources, media outlets or spokespeople, etc.

3. Community Mapping

Develop a “Community Map” (see Chapter 5) of any community you are planning to enter or are currently working in.

4. Secondary Targets

From your Power Map, identify specific individuals who could influence your primary target that you might convince to help. These become your secondary targets.

G. Messaging – Developed by the Campaign and Tailored with the Organizers

1. Campaign Media Story, Key Talking Points, and Slogan

- What is the campaign's overarching media story?
- What are the key talking points?
- Is there a memorable slogan? (No more than 10 words)

2. Organizing Narrative

What is the motivational organizing narrative that connects the big campaign goals, via an organizing strategy, to the immediate action organizers are asking people to take?

H. Identify Tactics to Build Power and Scale

1. Tactics

First, identify a set of tactics that will draw on your current campaign leadership, grassroots relationships, coalition partners, and mobilized supporters to do one or all of the following:

- Apply direct pressure on target decision-makers
- Engage “grassroots” to apply pressure on targets
- Create public visibility for campaign message via the media or other means
- Build your campaign scale as prioritized

Next, develop the following three types of tactics:

- In-person organizing tactics
- Online organizing tactics, including moving online supporters into in-person activities
- Tactics to implement media strategies

2. Timeline – Create a Six-Month, Detailed Work Plan

- All tactics should be placed on a month-to-month timeline. For each tactic, name the person who is responsible for ensuring the tactic is successfully accomplished.
- After six months, an evaluation should be conducted to see which goals and tactics succeeded and which did not. A new, detailed, six-month tactics timeline should be developed based on that analysis.

3. Budget

- What is your budget and how will you spend it?

APPENDIX II - DEVELOPING YOUR CAMPAIGN NARRATIVE

Use these worksheets to build your leadership skills in speaking to and recruiting others, engaging others in

sharing stories, and coaching others to tell their own stories.

WORKSHEET A - PREPARING YOUR STORY OF SELF

STORY OF SELF - OVERVIEW

What are the experiences and values that call you to take leadership as a staff member or volunteer working on campaigns?

Here are some key elements and types of experiences that may have contributed to your current choice to take leadership as a community organizer.

FAMILY & CHILDHOOD	LIFE CHOICES	ORGANIZER/ ENVIRONMENTAL EXPERIENCES
Family & Childhood	School	Role Models
Parents/Family	Career	First Experience of Organizing
Growing Up Experiences	Partner/Family	First Awareness of the Environment
Your Community	Hobbies/Interests/Talents	A Key Moment in Nature
Role Models	Experiences - Finding Passion	Current Experience in the Sierra Club
School	Overcoming Challenges	

Think about the elements of your story in the context of the challenges, choices, and outcomes. In this case,

the outcome might also be the lesson you learned, in addition to what actually happened.

CHALLENGE	CHOICE	OUTCOME

WORKSHEET B – PREPARING THE STORY OF US

Why is the community called to the work you will describe? What are the group's shared purpose and goals? What are their values? What is your reason for believing in the potential power of the people you will be speaking to? What can they do confront this challenge?

Take a moment to reflect on the stories of this particular audience. What gives you hope that they can work to-

gether with you on your particular environmental challenge? This story will for each different group of people.

As you think about your audience, think about the values they share that link to your own. Identify stories that have a challenge, a choice, and an outcome. Consider the emotions that each story evokes in you as you write it down.

1. Who is the audience/community that you will be speaking to? (It may be your fellow training participants, initially). What is the shared purpose and particular goal of this group? What are their values?

2. What are some stories that give you a sense of the purpose, values, strengths, and capacities of your audience/training participants?

3. What are some stories of your audience/training participants that give you the belief that together, you could work successfully to confront current environmental challenges?

WORKSHEET C – YOUR STRATEGY TO CONFRONT THE CHALLENGE

Why is it urgent to deal with climate disruption as a community organizer? What is your best strategy to organize in your community? What is the first step that each person can take to be part of your solution?

Take a moment to reflect here on your challenge. What

makes it urgent to you and your audience? Why must you collectively take action now? Once you have identified that urgency, lay out your strategy—what you think you can do together to confront the challenge. Most importantly, what step (or steps) can people take to join you in collective action towards a solution?

1. Why is it urgent to confront climate disruption now? What makes it so urgent, relative to other problems? Who are you serving in your community and the world by taking on climate disruption? In what ways are you expressing your values by taking on this challenge?

2. What is your strategy to help create climate solutions? How will you know that you are part of a larger climate solutions effort? What will the outcome look like if you are successful?

3. What are the most important first step(s) people can take to join you in this strategy? What form will their commitment take? Is it clear what they should do? Is it clear when they should do it?

WORKSHEET D - CREATING A CAMPAIGN NARRATIVE THAT INSPIRES OTHERS TO ACTION

STORY OF SELF	STORY OF US	STORY OF NOW
What are your experiences and values that call you to take leadership for the environment?	What is your reason for believing in the possibility of the people you will be speaking to? What can they do confront the challenge(s)?	Why is it urgent to deal with environmental challenges now? What is your strategy to overcome this challenge? What is the first step that each person can take to be part of your solution?

YOUR WHOLE STORY

Now that you have the components of a narrative, write your story here as you would tell it aloud to an audience.

COACHING TIPS: TELLING YOUR STORY TO OTHERS

We offer here a few “dos and don’ts” for coaching others in successfully telling their own stories.

DO – OFFER CURIOUS INQUIRY	DON’T – OFFER UNHELPFUL FEEDBACK
• Notice the CHALLENGE, the CHOICE, and the OUTCOME in the story • Identify “choice” points • Identify evidence of the kinds of emotions you heard in the story that might motivate people to take action (or fall into inaction) • Think about the intended audience, and the desired action or response from that audience • Help the speaker connect the dots: Identify what worked well and what could be improved • Look for themes • Help the speaker to “build the skeleton” then “put meat on the bones,” in terms of the basic story structure and details • Identify places in the story where images could speak louder than words	• Offer vague, abstract, “feel good” comments, unless you’ve established the context. (e.g., What does the storyteller learn from hearing “you did a great job,” as opposed to “the way you described your moment of choice made me feel very hopeful because... “?) • Make value judgments about the storyteller’s voice or the validity of the points she or he wants to make. The key is for each person to find a way to express themselves in their own voice (word choices, humor, metaphors, etc.). Of course, they need to know if choices they’ve made actually communicate what they mean to communicate.

APPENDIX III – SAMPLE COMMUNITY MAPPING ANALYSIS

A community map can take many forms. The example provided here is a real community map developed for a clean energy campaign in the Inland Empire region of Southern California.

THE INLAND EMPIRE: AN ANALYSIS OF COMMUNITY AND THE ROLE OF LOCAL CLEAN ENERGY

A. GEOGRAPHY

The Inland Empire is made up of San Bernardino and Riverside Counties in Southern California. With 4 million residents, it is the 13th most-populated metropolitan area in the United States, and third-largest metropolitan area in the state of California, following Los Angeles and the San Francisco Bay Area.

Geographically, the Inland Empire encompasses a very large area in Southern California. San Bernardino County is approximately 20,057 square miles in size, making it the largest county in the contiguous United States—and about the same size as Bosnia or Costa Rica. Riverside County is 7,206 square miles in size, and made up of mostly desert. The city of Riverside is the fastest growing city in California, and the fourth fastest-growing city in the United States, having added almost 1 million new residents in the past 10 years.

1. LANDSCAPE

The Inland Empire is geographically diverse. The area is

home to four major desert areas: the Mojave Desert, the Sonoran Desert, the Colorado Desert communities, and the Coachella Valley.

Additionally, Riverside County is home to 12 recognized Indian Reservations, the second highest number of reservations of any county the country. The recognized reservations are as follows: Agua Caliente, Augustine, Cabazon, Cahuilla, Colorado River, Morongo, Pechanga, Ramona, Santa Rosa, Soboba Band of Mission Indians, Torres-Martinez, Twenty-Nine Palms, and San Manuel Band of Mission Indians (in San Bernardino County).

2. WHO IS WORKING ON THE ISSUE

There are a few conservation groups in the Inland Empire who are currently working on preserving the landscape of the area. These groups are: the Sierra Club San Gorgonio Chapter, Green Institute for Village Empowerment, Inland Empire Waterkeepers, Inland Orange Conservancy, Riverside Land Conservancy, Wildlands Conservancy, and the Redlands Conservancy.

B. DEMOGRAPHICS

1. POPULATION GROWTH

According to the 2010 census, San Bernardino County had a population of 2,035,210 and Riverside County had a population of 2,189,641, respectively. With a surge in population over the past 10 years, the Inland Empire is the fastest growing area in the State of California. Some

interesting facts to consider:

- 65.3 percent of San Bernardino County residents are homeowners (compared to 57.9 percent for the state)
- 70.2 percent of Riverside County residents are homeowners (compared to 57.9 percent for the state)

2. RACE

Along with growth, the racial makeup of the Inland Empire is changing. It currently breaks down this way:

- 62 percent white
- 44 percent Latino
- 7.5 percent African American
- 5.7 percent Asian

The Latino population in the Inland Empire has grown significantly over the past few years. In 2000, Latinos made up 36 percent of the population in Riverside County and 39 percent of the population in San Bernardino County. It was projected that Latinos would make up the majority of the Inland Empire residents by 2015. Additional numbers to consider for the area include:

- 22 percent of Inland Empire residents are foreign-born
- 40 percent of San Bernardino County residents speak a language other than English at home
- 39 percent of Riverside County residents speak a language other than English at home

3. EDUCATION

- a. The Inland Empire on average, compared to the rest of the state, has lower levels of high school graduation, and lower levels of college graduates living in the area:
 - 79 percent of all students in Riverside County graduate high school (compared to 80.5 percent for California overall)
 - 77.3 percent of all students in San Bernardino County graduate high school (compared to 80.5 percent for California overall)
 - 18.2 percent of all San Bernardino County residents are college graduates (compared to 29.7 percent for California overall)
 - 20.4 percent of all Riverside County residents are college graduates (compared to 29.7 percent for California overall)
 - A 2006 study among the 51 largest metropolitan areas in the United States showed the Inland Empire was one of the least educated areas in the country
- b. The Inland Empire is home to 56 unified school

districts (33 in San Bernardino County and 23 in Riverside County).

- San Bernardino County has 638 schools (including elementary, middle, high, charter, alternative, magnet, public, and private)
- Riverside County has 457 schools (including elementary, middle, high, charter, alternative, magnet, public, and private)

c) The Inland Empire is also home to 23 Colleges and Universities: Brandman University, California Baptist University, California Southern Law School, Cal State San Bernardino, College of the Desert, La Sierra University, Mayfield College, Mt. San Jacinto College, Palo Verde College, Riverside Community College, Santa Barbara Business College, University of Phoenix, University of California Riverside, Barstow Community College, Chaffey College, Crafton Hills College, National University, Palo Verde Community College, Pioneer University, San Bernardino Valley College, University of Laverne, University of Redlands, and Victor Valley College.

4. RELIGION

Religious identity is important to residents of the Inland Empire. Of all the residents in the Inland Empire, the following self-identified as affiliated with a religious group:

- 78 percent Christian (with 39 percent Catholic, 36 percent Born-Again, 25 percent “other” Christian, and 14 percent Protestant)
- 14 percent no religion
- 1 percent other religion
- 1 percent Jewish

The Inland Empire is home to more than one thousand places of worship, mainly Christian churches. San Bernardino County has 570 Christian churches and Riverside County has 476 Christian churches, respectively. It is also home to Gold Base, headquarters for the Church of Scientology.

5. PROBLEMATIC FEATURES

Fundamentally racist, anti-immigrant groups, such as the Minutemen and other white supremacist organizations, are active in the Inland Empire—particularly in Riverside County, where the Latino population has grown significantly over the last few years.

The power structure in the Inland Empire, birthplace of the Hell’s Angels biker gang and longtime home turf for the Ku Klux Klan, has historically been hostile toward non-white residents. Complaints from residents toward local police departments and sheriff’s departments, especially in Riverside County, indicate a strong divide between many residents and these authorities, and longstanding issues of institutional racism.

6. WHO IS WORKING ON THE ISSUE

There are a few groups working on the issues related to race, immigration, and discrimination. The National Day Labor Organizing Network, in conjunction with the Pomona Economic Community Center and the Day Laborers Congress of the Inland Empire, are groups that work on issues of both immigration and labor. Libreria del Pueblo works on education and citizenship in the immigrant Latino community. Clergy and Laity United for Economic Justice (CLUE) and Inland Congregations United for Change (PICO Network) are two organizations focused on the religious communities of the Inland Empire. The Central City Lutheran Mission is a project that advocates for marginalized members of the community. The Social Justice Alliance of UC Riverside has also been an active group on all of the above matters. Additionally, foundations such as the Neighborhood Funders Group and the Discount Foundations have worked on voter, immigration, and labor issues in the area.

C. POLITICS IN THE INLAND EMPIRE

The Inland Empire is a Republican stronghold in California. However, what has traditionally been one of the most conservative, Republican-leaning regions in California has seen a shift in voter identification and turnout in recent years:

- In the 2008 presidential election, Barack Obama won both counties, a feat not accomplished since Lyndon B. Johnson ran for President
- Newer residents to the Inland Empire have Democratic leanings
- 34 percent of Inland Empire residents identify themselves as Democrats
- 33 percent of Inland Empire residents identify themselves as Republicans

The Inland Empire is made up of many cities, communities, and neighborhoods. The incorporated cities function under a mayor/council structure, while the unincorporated communities and neighborhoods fall under the structure of the county board of supervisors. The following shows the breakdown of the Inland Empire's political regions:

- San Bernardino County has five supervisors on its board
- Riverside County has five supervisors on its board
- Riverside County has 28 incorporated cities
- Riverside County has 48 unincorporated communities and neighborhoods
- San Bernardino County has 24 incorporated cities
- San Bernardino County has 61 unincorporated communities and neighborhoods

D. JOBS AND THE ECONOMY IN THE INLAND EMPIRE

Inexpensive land prices (compared to Los Angeles and Orange counties), a large supply of vacant land, and a transport network where many highways and railroads intersect, have contributed to the Inland Empire's development as a major shipping hub. Some of the nation's largest manufacturing companies have chosen the Inland Empire for their distribution facilities, including Toyota Motor Corporation's North American Parts and Logistics Distribution (NAPLD) center in Ontario, and APL Logistics in Rancho Cucamonga. Additionally, Whirlpool Corporation recently leased a 1.7 million-square-foot distribution center in Perris that is larger than 31 football fields—one of the biggest warehouses in the country. More than 80 percent of the state's imported cargo comes through the Los Angeles-Inland Empire corridor.

1. PROBLEMATIC FEATURES

Several problems plague the Inland Empire because of its economic situation:

- In 2010, the Inland Empire had an unemployment rate of 15 percent, the second-highest rate in the country after Detroit.
- More people live below the poverty line in the Inland Empire than is average for the state.
- 80 percent of the jobs in the region are low-wage, service-sector jobs.
- Of the newly created jobs in the area, many were in the warehousing, administrative, and food service industries. In warehousing, workers are hired through temporary staffing agencies rather than directly being hired by the companies. As a result, many workers do not have benefits, nor any guarantee of full-time work.
- In a 2006 survey of the 51 largest metropolitan areas in the United States, the Inland Empire ranked second-to-last in average annual wages at \$37,000 a year.
- One-third of all working adults living in the Inland Empire commute outside of the area for work, since the area is mainly made up of low-wage, service-sector jobs. This is the highest rate of commuters in the United States.

2. WHO IS WORKING ON THE ISSUE

Several labor unions have worked on addressing issues of low wages and employment opportunities in the Inland Empire: Warehouse Workers United (Change to Win), Laborers International Union of North America (LIUNA), Teamsters, Brotherhood of Electrical Workers, Service Employees International Union (SEIU), the American Federation of State, County, and Municipal

Employees (ASCME), National Educational Association (NEA), and the California Teachers Association (CTA) are among the most prominent labor unions in the area.

E. THE ENVIRONMENT AND PUBLIC HEALTH IN THE INLAND EMPIRE

With the new, rapid development of warehouses, urban sprawl, homes, and shopping centers, not to mention the third of the populace that commutes out of the area every day, and the large, diesel-powered fuels coming in daily from the ports of Los Angeles and the traffic congestion that brings, the Inland Empire region has seen a rise in serious environmental and health concerns.

The Inland Empire is home to 89 hospitals. San Bernardino County has 52 hospitals, and Riverside County has 37. Additionally, Riverside County has 228 parks and San Bernardino County has 247 parks.

F. ORGANIZING OPPORTUNITIES AND MESSAGING

The Inland Empire is a region ready to be organized for local clean energy. It is the fastest growing area in California, with the one of the highest unemployment rates and lowest average wages in the United States. And with one of the worst environmental records in the country, the area is in desperate need of a sustainable solution. Local clean energy could potentially be that solution.

1. Geographic factors

- Since the majority of the Inland Empire is desert, there is constant sunshine year round.
- The Inland Empire has lots of desert space where solar farms could be built. However, the focus on Local Distributed Generation (LDG) prioritizes local community projects.
- Both Riverside and San Bernardino Counties have ample vacant lots scattered through the area. Great opportunity for local Community Solar Farms.
- The high number of warehouses in the area means the Inland Empire has plenty of available rooftop space. Three of the largest 10 warehouses in the world are sited in the Inland Empire.
- Due to relatively affordable housing, the Inland Empire has a higher level of home ownership than the rest of the state, meaning there is strong potential for homeowners to have solar panels on their rooftops.
- Opportunities to organize community homeowners.
- Opportunities to organize local businesses.

2. Jobs

- The Inland Empire has an unemployment rate of 15 percent. There is a workforce available and ready to work, if jobs can be created for them.
- The Inland Empire suffers from a predominance of low-wage, service-sector jobs. Any prevailing-wage construction jobs and subsequent sales jobs that would be created from developing a local solar industry would boost the local economy tremendously.
- Bringing local jobs to the Inland Empire would reduce the high rate of commuting, with subsequent improvements to residents' air quality, traffic concerns, and lifestyles.
- Partnerships with local unions and politicians could be developed.
- Opportunities to organize residents around the economic benefits of clean energy.

3. Education

- Higher availability and quality of local jobs would demand a skilled workforce. Graduation and retention rates from high school, and subsequently trade techs and community colleges, could rise if local solar energy became a major player in the economy.
- As solar energy becomes a player in the local economy, higher aspirations and a push to complete higher education, as to produce engineers and architects, could be seen.
- Partnerships with local school districts and politicians could develop.

4. Environment

- More local jobs would mean less commuting. This could be a small step in the right direction in fighting the smog issue in and around the Inland Empire.
- LDG would give a great use to the vacant plots and rooftops without much impact on the environment.
- LDG would help preserve the deserts and wildlife.
- Partnerships with local conservation groups and CCAEJ could develop.
- Partnerships with local health advocacy groups could develop.

5. Politics

- The face of the Inland Empire is changing:
- More Latinos and immigrants are moving into the region
- More self-identifying Democrats are moving into the region

- If the local Republican stronghold does nothing to change its traditional stance on immigration, the region could potentially see a change in political power structure during the next few election cycles (with the proper organization and agitation).
- Partnerships with ACCE and the Occupy Movement could develop.
- An organized base of residents would influence its churches as well, and the IE is a highly religious region. Partnerships with CLUE and PICO would be crucial.

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