



RECLAIM *the* REPUBLIC.  
RESTORE *the* CONSTITUTION.

# **The Grassroots Activist's Guidebook**



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# **The Grassroots Activist's Guidebook**

*The most important thing you can do to protect liberty is simple...**Show Up.***

## **Introduction: Guide Overview**

### **Distribution**

This guide is intended for all C4L Local Coordinators. Please do not distribute this guide to anyone. As you begin to make a difference in your community, you will attract the attention of friend and foe alike. We do not want to train our enemies or give away valuable strategy.

### **Purpose**

This Guide has been prepared to assist your efforts in becoming an effective Campaign for Liberty (C4L) local leader. It will better enable you to foster and create liberty-driven, activist-oriented networks within your community.

The following guide contains information, suggestions, examples, and strategies used by the most successfully organized C4L teams from across the country. If you review and implement these strategies, you will be an effective activist and expand the liberty movement in your community and beyond.

Remember, C4L exists to expand the liberties of Americans and strengthen the liberty movement at the grassroots level by:

- Recruiting new members and developing new leaders
- Advocating for Constitutional, limited government within your communities
- Educating, training, and mobilizing citizen-activists to drive change in all levels of government

### **Lay Out**

Training and tips will be  
highlighted in a green box

Examples will be  
Highlighted in a blue box

**About the Guide**

This guide is not a cookbook. You will ultimately succeed because of effective, enthusiastic activism, while inspiring and motivating others to take action.

As you gain traction and begin to grow your liberty network, the vetting and grooming of additional local leaders is paramount to long-term success.

Both new and established C4L local leaders will find useful information in this manual. It will guide you through essential steps necessary to build a strong foundation from which to grow and provide tools for maintenance of the team.

**You Are Not Alone**

While the following guide will be helpful in laying the groundwork to help you get started, we understand there will be questions that will arise as you endeavor to move your area toward liberty.

Campaign for Liberty leadership is here to help fill in the gaps. Your state's team of coordinators and State Operations staff are committed to providing the support and mentoring necessary to help you succeed. Should you have questions along the way, please be sure to contact your leadership team.

## **Chapter 1: Campaign for Liberty**

Before you dive headfirst into spreading the message of liberty throughout your community, you should take a moment to consider exactly what it is you're getting into.

C4L's activism, resources, training, speaker network, and much more, distinguish it as the premier group for liberty.

As a C4L local leader, you are a steward of the liberty movement. Please project professionalism in all that you do in the Campaign for Liberty name, in order to preserve the reputation of Ron Paul's legacy.

### **History**

Campaign for Liberty is a 501c4 non-profit, grassroots lobbying organization that was founded in 2008.

Since then, Campaign for Liberty has established numerous state and local teams. The organization has helped to pass or block legislation at the local, state, and national levels, establishing a foothold for liberty in our time.

The organization was behind the effort that made "Audit the Fed" a household term and in 2012 was successfully able to pass that legislation through the U.S. House of Representatives.

In short, Campaign for Liberty is the premier group for advancing the liberty movement in the United States.

### **Mission Statement**

The mission of Campaign for Liberty is to promote and defend the great American principles of individual liberty, constitutional government, sound money, free markets, and a constitutional foreign policy, by means of education, issue advocacy, and grassroots mobilization.

### **C4L Statement of Principles**

Americans inherit from our ancestors a glorious tradition of freedom and resistance to oppression. Our country has long been admired by the rest of the world for her great example of liberty and prosperity—a light shining in the darkness of tyranny.

The U.S. Constitution is at the heart of what the Campaign for Liberty stands for, since the very least we can demand of our government is fidelity to its own governing document. Claims that our Constitution was meant to be a "living document" that judges may interpret as they please are fraudulent, incompatible with republican government, and without foundation in the

constitutional text or the thinking of the Framers. Thomas Jefferson spoke of binding our rulers down from mischief by the chains of the Constitution, and we are proud to follow in his distinguished lineage.

With our Founding Fathers, we also believe in a constitutional foreign policy. Inspired by the old Robert Taft wing of the Republican Party, we are convinced that the American people cannot remain free and prosperous with an overstretched military that contributes to the bankrupting of our country.

We believe that the free market, reviled by people who do not understand it, is the most just and humane economic system and the greatest engine of prosperity the world has ever known.

We believe with Ludwig von Mises, Henry Hazlitt, and F.A. Hayek that central banking distorts economic decision-making and misleads entrepreneurs into making unsound investments. Hayek won the Nobel Prize for showing how central banks' interference with interest rates sets the stage for economic downturns. And the central bank's ability to create money out of thin air transfers wealth from the most vulnerable to those with political pull, since it is the latter who receive the new money before the price increases it brings in its wake have yet occurred. For economic and moral reasons, therefore, we join the great twentieth-century economists in opposing the Federal Reserve System, which has reduced the value of the dollar by 95 percent since it began in 1913.

We oppose the dehumanizing assumption that all issues that divide us must be settled at the federal level and forced on every American community, whether by activist judges, a power-hungry executive, or a meddling Congress. We believe in the humane alternative of local self-government, as called for in our Constitution.

We oppose the transfer of American sovereignty to supranational organizations in which the American people possess no elected representatives. Such compromises of our country's independence run counter to the principles of the American Revolution, which was fought on behalf of self-government and local control. Most of these organizations have a terrible track record even on their own terms: how much poverty have the World Bank and the International Monetary Fund actually alleviated, for example? The peoples of the world can interact with each other just fine in the absence of bureaucratic intermediaries that undermine their sovereignty.

We believe that freedom is an indivisible whole, and that it includes not only economic liberty but civil liberties and privacy rights as well, all of which are historic rights that our civilization has cherished from time immemorial.

Our stances on other issues can be deduced from these general principles.

Our country is ailing. That is the bad news. The good news is that the remedy is so simple and attractive: a return to the principles our Founders taught us. Respect for the Constitution, the



rule of law, individual liberty, sound money, and a constitutional foreign policy constitute the foundation of Campaign for Liberty.

### **A Quick Guide to Understanding a 501(c) (4)**

The IRS has different classifications of non-profit groups under section 501 of the IRS code. Education/Think Tanks/Churches/Legal Defense Groups are 501(c) (3) organizations. Citizen lobbying organizations are 501(c) (4) – this is Campaign for Liberty's designation. Political Action Committees and 527 groups are under a separate section.

Here are the differences in a nutshell (this is a short summary, if you have a specific question please email Kirk at: [kirk@kirkshelley.com](mailto:kirk@kirkshelley.com)).

501(c) (3) – Donations are tax deductible, but they can't do lobbying or anything related to elections.

501(c) (4) – Donations are not tax deductible, but they can do lobbying and voter education. Donor information does not have to be reported and no other regulation.

PAC's and 527 – Donations are not tax deductible, there are no limits in what they can do in lobbying and political activity. They are regulated at the federal level by the Federal Election Commission and by separate organizations at the state level. Donors must be reported.

#### **What 501(c) (4) Groups Do:**

- Encourage people to be very active in all aspects of political life (party involvement and promoting/opposing candidates as an individual).
- Create and disseminate a piece of lobbying material that shows stances based on candidate survey or the voting record of Incumbent X. Ask X to apologize and pledge never to vote that way again.
- Advise that other organizations did or did not endorse a candidate (be cautious - do not recommend them, but state that they did or did not).
- Name members of Campaign for Liberty who are running for office, and "if you'd like to learn more or help, here is a link to his website / here is his phone number." [e.g., "Campaign for Liberty does not endorse candidates, but here is some interesting information about a member who is running for..."]
- Conduct campaign training school for candidates, and activists interested in running for office or working on political campaigns.
- Send out a press release scolding politicians for their bad behavior and demanding political repentance (*all press releases must be submitted to State Operations for review.*)

Regarding, policy legislation & legislature, you can do whatever needs to be done (you can attack policy and legislation including those who support the policy and/or legislation).

Remember, the most effective time to lobby a legislator and get the public's attention is around election time. This is when the politicians are most sensitive to the needs of the voters and it is also a time when average citizens are actively interested in political issues.

Political party actions are not regulated by the federal government, so you can say you are a member of Campaign for Liberty (but do not say "we need to take over the Party so we can get \_\_\_ elected").

### **What 501(c) (4) Groups Don't Do**

501(c) (4) groups shouldn't use "magic words" like 'elect' or 'defeat'. The do's and don'ts are complicated due to McCain/Feingold. Campaign for Liberty advises to err strongly on the side of caution. *If you have any questions please send them to [kirk@kirkshelley.com](mailto:kirk@kirkshelley.com).*

### **Very Clear List of Prohibited Activities –**

- DO NOT endorse anyone for any elected office using the Campaign for Liberty name or your title. You are free as an individual to endorse anyone you want as long as C4L is not named.
- DO NOT send a letter of endorsement to the C4L membership list.
- DO NOT use C4L funds to contribute to a campaign.
- DO NOT advocate the defeat of a candidate or give money to ensure the cause of defeat of a candidate.
- DO NOT place electioneering information on a County, Region or State page (no need to police personal blogs).

*(Please see the appendix for additional [FAQ's about 501c4's](#))*

### **Our Strategy**

In the world of 501c4's, there are two different models for lobbying legislators—Access based and Confrontation based. Campaign for Liberty believes that the more typical, Access based model has contributed greatly to America's downward spiral.

Access based organizations compromise their values for greater access to the political class, and their focus shifts from fighting for their cause to working toward achieving the goals of their favored politicians.

The primary difference between the two models is, in short, greater access to or greater power over the political class, and every activist must decide which one he or she wants.

Campaign for Liberty believes that the Confrontation based model is the only path to restoring our liberties. It is through this model that real power is gained and meaningful change is achieved.

*(For more on this, see [Chapter 4: Essential Lessons For Winning](#))*

## Chapter 2: Organizational Structure

Like most large organizations, Campaign for Liberty has a tiered organizational structure.

This chapter will help you to understand the roles and responsibilities of each level and how the different levels relate to one another.

### **National Campaign for Liberty**

The National Campaign for Liberty is responsible for planning and executing national battles.

National has sole authority over any federal legislation and related items such as the Federal Candidate Survey Program.

Among other things, National C4L:

- Alerts states about national legislative activities and critical votes
- Plans and hosts annual training conferences
- Is solely responsible for the federal C4L candidate survey program
- Assists and mobilizes State and Region Coordinators on Federal issues
- Approves and distributes emails from State Coordinators

### **Campaign for Liberty State Operations**

Campaign for Liberty State Operations is directly responsible for assisting and supporting state groups as they work toward achieving their organizational goals.

State Operations:

- Develops and provides activist and leadership training and tools
- Assists Coordinators in basic knowledge of coordinator tools
- Provides expertise and insight on political tactics and local initiatives
- Recruits, equips, trains, and mobilizes State and/or Region, County, and Local Coordinators
- Lends support for local, county, regional, and state initiatives
- Administers the C4L State Legislative Candidate Survey Program
- Works to preserve and protect the C4L brand for all members by ensuring that leadership is acting in accordance with our mission and 501c4 laws
- Works with leadership in a timely fashion to evaluate and approve state emails, projects, petitions, literature, fundraising, press releases, and formal communications
- Provides assistance with projects, communications, and event planning
- Works with National C4L to ensure proper flow of communications

## State Campaign for Liberty

The state Campaign for Liberty group has leadership at multiple levels: State, Region, County, and Local. All state leadership levels support each other on local and state initiatives, and they also provide assistance to National on federal issues.

Keep in mind that with 50 unique states, one size is not going to fit all. Certain structural elements will apply across the board, but the tiers of leadership may differ slightly from state to state. For instance, in states with lower populations, it might not make sense to have Region Coordinators, while states with higher populations could not function without them. Each State Coordinator will ultimately be responsible for determining the organizational structure in each state.

### State Coordinators:

- Act as a Local Coordinator in their own backyard
- Are appointed by C4L State Operations
- Plan and determine the structure of the state leadership team
- Recruit, vet, and promote County, Region, and Local Coordinators
- Assist in getting County, Region, and Local Coordinators equipped, trained, and mobilized
- Facilitate communication between members, and state and C4L State Operations
- Plan and execute state level battles with their teams
- Provide team members with tools and support for success
- Provide support and mentoring for local and county efforts
- Plan/host training events
- Assist National and other state leaders with Federal initiatives
- Cultivate relationships with like-minded organizations (see cautions regarding this in [Chapter 4: Coalition Building](#))
- Work with C4L State Operations Team on Candidate Survey Program
- Facilitate National approval of activities conducted within the state under the Campaign for Liberty name

### County Coordinators:

- Act as Local Coordinator in their own backyard
- Live in the county they are coordinating
- Recruit and mobilize new members and Local Coordinators
- Inform members about upcoming C4L training opportunities
- Host monthly meetings to inform, motivate, equip, and mobilize membership
- Cultivate relationships with like-minded organizations (see warnings and more information about this in [Chapter 4: Coalition Building](#))
- Develop and implement goals to bring your local area into the liberty column
- Track local government activities; then inform and mobilize membership concerning important upcoming votes
- Maintain voting records of local Representatives and bring attention to bad votes
- Educate, recruit, train, and mobilize citizen activists for local offices
- Assist and mobilize members in the county regarding Federal and State issues

- Communicate needs and plans with Local, Regional and State leadership
- Coordinate county and regional events
- Contact and welcome new members in area of responsibility
- Assist members in basic knowledge of tools
- Gain C4L headquarters approval of communications conducted under the Campaign for Liberty name ([See Chapter 7: Policies and Guidelines](#))

## Local Coordinators

There is no more important individual in our army of ideas and civic action than the Local Coordinator / activist. The Local Coordinator gets our message to the community, identifies like-minded patriots, and mobilizes them to take action.

The goal of each one of us should be to win our own neighborhood for liberty. The Local Coordinator will lead the charge in fighting for or against local initiatives—effectively transforming government where it matters most—in their own backyard. They also play a pivotal role in training, organizing and mobilizing the people who will, as individuals, select and elect liberty-minded candidates for a wide variety of offices, ranging from Congress to their local school board.

The Local Coordinator is the first and most important link in the chain that makes up our representative form of government, and the role they play is essential to grassroots mobilization.

Every leader within C4L must first be a Local Coordinator. Should you choose to pursue a County or State Leader role, your contribution as a Local Coordinator does not end, but rather, enhances your work in that role.

Recruiting, equipping, and training new Local Coordinators is a high priority and is vital to winning back our liberties. Local Coordinators recruit and petition within their own neighborhoods and they take action at the many local governing bodies throughout your state.

*All Local Coordinators must have a User Account on the website and must have signed the NDA [at this link](#). A copy of the NDA is provided for reference in [Chapter 7: Policies and Guidelines](#). However, please note: The NDA MUST be signed online, using the link provided.*

### Local Coordinators:

- Recruit and mobilize new members
- Recruit at least 1 local leader per year
- Host community events
- Cultivate relationships with members and non-members
- Communicate needs and plans with County Coordinator
- Coordinate efforts in their neighborhood
- Attend Township, City, and County meetings to effect change at the local level

- Attend local political party meetings and shape the direction of the party/platform
- Inform local activists of important upcoming local votes, and organize opposition or support

NOTE: All leadership must first be Local Coordinators

## **Organizational Roles**

There is no magic formula for what your local leadership structure should look like. It is up to you as a Local Coordinator to organize your team in a way that best fits your needs. As you go about establishing the different roles within your community, remember that time, talent, and treasure are often in short supply. Always take these 3 things into account in your planning.

## **Delegating Responsibilities**

This cannot be stressed enough - you cannot do it alone. We each have certain strengths and weaknesses, and it is imperative for your success and longevity that you utilize the strengths of other individual activists.

Delegating tasks allows other supporters to have “buy-in.” When supporters feel they are a vital part of the team, they are more driven to see a battle through to its completion. If you do all of the heavy lifting, leaving only insignificant tasks to other activists, not only will you burn out very quickly, but you will also see supporters quickly dropping out.

Within reason, ensure that supporters are allowed to contribute at their desired level. Obviously not every member can be the leader of a team, but with all of the many tasks involved with organizing and carrying out your goals, there should be plenty of work to go around.

## **Tasks**

The following is a list and description of some of the necessary tasks to be performed within your local area. (You may choose to recruit individuals or teams to carry out some of these tasks.)

## **Research**

- Perform daily searches for news and updates on chosen issues
- Track progress of present and potential legislation/issues
- Develop list of “friendly” vs. “unfriendly” legislators/board members (and the issues on which they are friendly)
- Research past votes of sitting legislators/board members
- Study local demographics to assist with strategic planning
- Examine government budget documents to pinpoint activism needs

**Literature Development** (Note: Literature containing C4L logo and created for external distribution must be submitted to your state leader for approval prior to distribution)

- Develop petitions
- Develop postcards and fliers to distribute to your neighbors
- Develop internal literature, such as comprehensive lists of talking points defending your position on the issue(s) and tearing down the opponent's position

**Events/Activism** (Note that the purpose of most events/activism is to build your list)

- Organize "lit drops" and petition drives
- Plan a Mass Action Day and/or rally to bring focus to your issue(s)
- Turn the membership and community out for important hearings and/or the final vote
- Organize "tabling" events

**Editorial/Communications** (Please submit formal communications to be distributed in the name of Campaign for Liberty name or logo to your County or State Coordinator for approval prior to posting or distributing.)

- Email your supporters about your issue(s)
- Write blogs and updates for Facebook or other official online sites
- Compose Letters to the Editor

**Recruitment and Training**

- Look for potential new members at every opportunity
- Recruit at least 1 new Local Coordinator per year
- Once recruited, follow up with training tips and materials to keep new members actively plugged in
- Assist supporters as they endeavor to learn the various facets of their local government structure and the activism they must participate in to win

**Data Management** (See more on Data Management in [Chapter 5: Manage and Build Your Team](#))

- Build and maintain a local contact list
- Manage local voter data
- Track meeting turnout and recruitment efforts

## Chapter 3: Getting Started

*Note: The 6 training steps in your Local Coordinator Boot Camp Workbook should be completed and updated regularly. You will need to refer to the details in your workbook frequently as you fight your battles and/or recruit your neighbors.*

### Why Work at the Local Level

As of 2012, there were 89,055 units of local government in the United States. Most of these entities have the power to levy taxes and issue regulations that limit your freedom.

While citizen participation at all levels of government has fallen off in recent decades, many (if not most) people tend to be far more concerned with politics at the national level than they are at the local and state levels. This allows nearly 90,000 governing bodies to assault liberty, mostly unchecked.

We must transform the local landscape if we hope to achieve meaningful change at the state and federal level. That's why it's so important to have activists fighting for liberty in their own backyards. And winning battles at the local level is much easier since elected board members live among the electorate they are meant to serve.

The liberty movement has countless supporters spread all across this country. Many are readily visible on various forums on the Internet and often show up with a friend or two at some type of political event. Yet for all their passion, their efforts are, in large part, ineffective.

The question needs to be asked, "Are you content with constantly criticizing the loss of your liberties on the Internet, and occasionally raising your voice in a public forum, or are you truly committed enough to start to seize political power?"

Every local battle can be used to build the membership base and find new liberty-activists who will assist you in your efforts. You can then help to develop new leaders who may someday take on more responsibilities in your area, ensuring that your neighborhood will not be left wanting if you should happen to move, or are otherwise unable to participate at a previous level.

Your neighbors will become your insurance policy, exerting pressure on new and existing elected officials to force a proper vote.

### You Provide the Counterweight

One of the things lacking in American politics at the local level is a counterweight to bad political behavior. Because of a lack of constitutional grassroots activists, there simply have been no consequences for politicians voting against liberty, making bad decisions, and providing you with bad governance.



By building an effective local network, you suddenly have the counterweight to use against your bad governing boards.

How often have you addressed a local politician face-to-face about their bad behavior but not had any real mechanisms for inflicting pain on them? Do you really think they care that you are personally incensed? How often have you gotten the feeling from your conversation with your elected official that you are not politically respected? Do you want this to stop?

The choice is yours to make. You can either be a political blogger, having no real effect, or you can start to make yourself into a refined political weapon that over time will begin the process of gaining political power within your town.

### **Let's Play Whack-a-Mole**

Building your local network gives you the ability to inflict pain. By using the successful models taught by your Campaign for Liberty consultants, you can turn your local political landscape into a "whack-a-mole" game. Politicians no longer will control the game, and will go crazy in their efforts to neutralize you. It is at that point that politics really becomes an enjoyable endeavor from your side of the fence.

A strong local network removes you from being victimized by your elected officials. It places your political destiny in your own hands. It gives you the ability to be politically feared, and once you are "politically feared, you will be politically respected."

### **Get to Know the Political Lay of the Land**

An important part of orienting yourself to the political lay-of-the-land in your area is to get to know all of the political players. That means keeping abreast of what is happening at your local governing boards (such as Township, Village, School Board, etc.) and within local political parties.

You should familiarize yourself with the key players within your legislative bodies and other positions of power. In addition, you should research the people who pull their strings and appear to hold sway over them. Knowing where a politician's money comes from provides you with valuable information you can use in [Red Fox Four evaluations](#) and your [5-Column Analysis](#). (It can also supply you with fodder you can use against them.)

As time permits, research each sitting board member. (For a complete list of critical data to gather, please refer to your Local Coordinator Boot Camp Workbook and be sure to store your information there.)

Find out:

- What is their voting record on liberty issues?
- When did their tenure begin?

- Were they initially elected or “awarded” the seat when the previous board member stepped down?
- By how much did they win each Primary (if applicable)?
- By how much did they win each General Election (if applicable)?
- What is the breakdown of registered voters in their district?
- What was the voter turnout in each election?
- When is their next election?
- Do they have aspirations for higher office?
- What positions of power, if any, do they hold?
- What committees, if any, do they serve on?
- Who are their known associates and associations outside of the board?
- Do they receive more contributions from individuals or PACS and other sources?
- Who were their major donors?
- Their phone number
- Their cell phone number
- Their street address
- Their careers outside of the board
- And even what church they attend

**Tip:** You should research and track every detail you legally can about these “public servants.” Each detail will be useful in planning your strategy for future issue battles. For instance, knowing a politician’s home address will come in handy when you plan literature drops targeting his neighborhood.

To maximize your efforts, it is imperative that you are familiar with the demographics within each voting precinct in your immediate area. Identifying voting districts that are likely to be strongly influenced by your efforts will enable you to target your battles for greater success rather than spending a lot of time wasting efforts and spinning wheels.

## Chapter 4: Essential Lessons for Winning

Before you pick your first fight, it is essential that you are properly armed. The following lessons will help to fill your activist arsenal with the tools you'll need to properly prepare for and carry out your battle plans.

### Training: The Real Nature of Politics

*The following is a lecture by Mike Rothfeld. Mike has over 25 years of experience as a political consultant, with a national reputation for political confrontation and success. He has taught political tactics to thousands of activists and guided the formation and growth of many conservative organizations.*

Few of the lectures I give on political technology and campaigning make people as agitated as this one.

None is more important.

Simply put, politics is not about the common good, appealing to men's better angels, nor serving our Lord. These may be your motivations. I pray they are mine. Occasionally, they will be a politician's motivation.

Politics is the adjudication of power. It is the process by which people everywhere determine who rules whom.

In America, through a brilliant system of rewards and punishments, checks and balances, and diffusion of authority, we have acquired a habit and history of politics mostly without violence and excessive corruption.

The good news for you and me is that the system works.

The bad news is it is hard, and sometimes unpleasant work, for us to succeed in enacting policy.

There is absolutely no reason for you to spend your time, talent, and money in politics except for this: If you do not, laws will be written and regulations enforced by folks with little or no interest in your well-being.

The following pages may challenge everything you thought you knew about politics, and everything you have been told about politics from your high school civics teacher to the lead editorial writer in your local paper to the politics "expert" at a respected organization.

But if you read carefully and understand, you will become capable of leading a successful fight for your values.

### **Politicians — Not Education and Not Public Opinion — Make Policy**

The first mistake most folks make when they set out on a good-faith crusade to do good is to completely misunderstand their targets.

Sometimes, activists make the local newspaper or media the target. The thinking goes, “If we can just get them to understand the problem, things will change.” It is fortunate that this is not correct, because the media in the U.S. is overwhelmingly committed to big government, gun control, and the supremacy of state-controlled education over parent controlled education.

The fact is newspapers cast no votes. The national evening news controls no elections. If this were not true, Ronald Reagan would never have been President.

An even more common mistake is to believe that the key to victory is education.

The “education is the key to political victory” theory claims that if we educate people as to the problem and the solution, then the elected officials will fall in line.

Wrong.

Polls show huge majorities of Americans in favor of parental notification before a minor has an abortion. Yet the mere mention of the issue drives most politicians into fits of terror. Similarly, three-quarters of the American people oppose forced unionism and favor Right to Work laws; however, such laws exist in only 22 states.

It is important to understand the two reasons why the education theory of politics is a mistake.

First, the theory assumes no opposing “education” effort. This is rarely the case.

Polls showed a majority in California favored education choice, yet the 1992 School Voucher Referendum lost 2-1 on Election Day. Why? Because the NEA-teachers’ union bosses and pro-government-school-monopoly forces out-organized school choice forces, had a more focused message, and spent a lot more money.

The second, and more important, reason the “education is the key” theory fails lies in the nature of politics and politicians.

### **Policy in the Margins: Why Grassroots Politics Works**

What follows is a generalized breakdown of voting in any given election:

<b>People</b>	<b><i>Percent for Victory</i></b>
100%, all people	50%, plus 1
70% eligible to vote (excludes aliens, felons, and minors)	35%, plus 1
40% registered to vote (approximately 60% of eligible)	20%, plus 1
20% vote on election day (50% of registered voters)	10%, plus 1
7% almost always vote Republican 7% almost always vote Democrat	
6% swing votes	3%, plus 1

Three percent of the population plus one voter; here is where politicians live and die.

In some local and state elections where turnout may be only 20 percent of registered voters, the margin may be far less than three percent plus one.

The average politician lives in constant fear of alienating any substantial portion of this three percent plus one voter he needs in a hotly contested race to win reelection, or to gain higher office.

What is the best way not to alienate these voters? Do nothing to make them mad, which almost always means....do nothing.

This is why even when new politicians are elected, little seems to change. Inertia — or the status quo — is the most potent force in politics.

However, by mobilizing and directing voters rallying around a specific issue, you can change the political environment for a politician or even a group of politicians. One relatively small group can make it more costly for the politician not to act than it is for him or her to act as you want him to.

This is what I mean when I say that policy is made at the margins. Over time, the number and effectiveness of activists determines political success or failure.

This is also why the homosexual lobby, labor unions, and organized groups so often get legislation they want. They have groups of voters who can, and will, vote on their issue alone. And they often have workers and sometimes money to use against any politician who crosses them.

By becoming a grassroots leader, you can too.

That's where the fun, and the danger, begins.

### **How Politicians React to Pressure**

In a better world, you would mobilize, the politicians would immediately agree to do everything you want, the policy would be changed, and we would all live happily ever after.

Of course, it rarely happens that way.

When a provision harmful to homeschooling parents was located in the 1994 Education Bill (H.R.6), Mike Farris' Home School Legal Defense Association directed some one million calls and letters to Congress in a three-week period. The amendment to strip out the offending language passed the U.S. House of Representatives 434-1. Another amendment by Representative Dick Armey (R-TX) to positively protect home schoolers passed 374-53.

It was a rout.

The rout occurred not just because the homeschooling community was so mobilized (though they were) but because they were mobilized for a very specific purpose, to which there was virtually no organized opposition.

It was an easy decision for members of the House of Representatives.

This is not the case for most controversial issues. It is certainly not true for any legislation relating to the right to keep and bear arms or abortion or right to work.

So how will a politician react to your organized pressure when he knows there is or is certain to be, organized pressure against your position?

The first thing the politician will do is try to make you go away without giving you anything of substance. If he gives you anything of substance, then those organized on the other side will be mad.

So most politicians will try to make you quit by intimidation, explanation, or buying you off.

Many politicians — especially those used to being treated like royalty rather than public servants — may try to threaten and intimidate. Statements such as, "If you ever try something like this

again, I'll vote against you for sure," or "I'll tell the newspaper you're a trouble-maker" are not uncommon. A rudely spoken, "I don't know who you think you are, but that's not how we do things here, and no one will work with you again" followed by a slammed-down phone receiver is another favorite.

Remember, you are not running for office. The politician is. Then remember the three percent plus one voter margin, and double your efforts to mobilize.

Before long, even this politician will go to a new tactic.

Most likely, a politician (whether or not intimidation is attempted) will seek to placate you by "explaining" what he or she calls "the political reality." Sometimes the explanation may be made by a surrogate for the politician; a member of his staff, a lobbyist or even, in many cases, a well-known advocate for your issue.

The message usually takes the basic form of, "I've been doing this for a long time and believe me, I share your concerns but we just can't pass that bill right now," or "even if we could pass what your people want, the Governor (or President or a judge) will kill it," or "It's the best we could do," or simply "We'll lose."

First of all, so what? Rome was not built in a day, nor is major policy passed overnight. Sometimes it may take years. But policy will never change if politicians never vote on it. Policy is changed one vote — one politician — at a time.

Second of all, the reason this is often true is that politicians succeed in ducking difficult votes, thus preventing voters from ever knowing exactly where they stand.

Your job as a grassroots leader is to convey to the politician your supporters' insistence on his or her personal, public and on-the-record support for your position.

Of course, you do want to pass your legislation (or defeat your opponent's legislation), but first and foremost, you want the politician's complete public support. As an aside, a commitment in writing is better than a verbal commitment, and a vote on the most controversial piece of the bill (not necessarily final passage) is better than a written commitment.

Private promises are worthless.

When you have insisted on the politician's support for your position, they will then try to buy you off. Here is where the best grassroots leaders fail.

### **Power, Access and Selling Out**

Politics can be seductive.

The chance to rub elbows with elected officials, being looked up to by people in your community as someone in the know, invitations to and recognition at special events, being quoted in the media, helping to write “acceptable” compromise language, an appointment to some committee or task force, or even a paid job in the politician’s office or campaign — all this could be yours if you become a grassroots leader. These are the trinkets for which leaders sell out their political agenda.

Of course, most everyone thinks he is strong enough, smart enough, and committed enough not to sell out. Few people are.

Before long, instead of delivering to the politician the grassroots’ message to pass or defeat specific legislation, you become the politician’s representative, telling grassroots activists what they must settle for.

Right now, today, decide whether you want access or power.

Access is calling a politician and having him take your call. He listens to what you want, and may or may not do it. It is what most grassroots leaders end up settling for. This is the way most non-controversial (e.g. business accounting before Enron) and high-interest versus low-opposition (e.g. farm subsidies) political business is done.

Power is the ability to tell a politician what you want, and either get it or deliver substantial pain (maybe even get a new politician) at the next election. This is the ONLY way ideological, controversial legislation can be passed or defeated (e.g. abortion, guns or homosexual special rights).

Again, I urge you to remember the three percent plus one voter.

You and your grassroots group may be able to single-handedly bring the politician down. Or perhaps you will be one of a handful of groups organizing at the next election.

No matter what, you will make it harder for the politician to win re-election, costing him extra time and money. If the politician loses, every other elected official will fear you and your group.

If the politician wins, he (and other politicians) will remember the extra pain you caused him. And he will know you may do it again or worse. When you return to continue fighting for what you believe in, you will find him and his colleagues more willing ... and surprisingly, sometimes more gracious (though do not count on the latter; personal pleasantness is cheap coin).

As the late Everett Dirksen said, “When I feel the heat, I see the light.”

### **Winning in the Long Run**

There is a great deal more I could tell you.

- How to recruit for your grassroots organization.



- How best to communicate with politicians.
- The differences between offensive and defensive legislative strategies.
- When and how to use the media.
- The best ways to raise money for the short-term and the long-term.

But what I would like to close with is the importance of taking a long-term approach to fighting for your values. If you remember from the beginning of this article, I said the good news is that the system works. I hope by now you see what I mean. Namely, the politicians are still subservient to the people who elected them ... to you and me. However, most of the time, a fight to really make a difference may take years. This is especially true the further from local politics you get.

It's true Mike Farris and the Home School Legal Defense Foundation won the battle for homeschoolers in the U.S. Congress in just a few weeks as described above. But Mike Farris spent years building his organization of homeschoolers. More importantly, as I noted, there was little or no opposition to the mobilized homeschooling force.

Since then, in fights to pass any kind of school choice — much more, a full tax credit — the results have been very different. In fact, President George W. Bush easily abandoned the conservative opposition to federalized education and passed the No Child Left Behind Act with overwhelming Republican support. The size and effectiveness of the advocates of bigger government schools dwarfs those of us who are committed to school choice.

When you first start out, expect not to be taken seriously; especially if you insist upon principle and refuse to compromise or to be bought off.

The key will be for you and your grassroots activists to aggressively make politicians pay a price for their failure to pay attention to their constituents (you and your group). Every year, every session of the legislature, you must return pushing for your principles. And every election, you must cause pain to as many politicians as possible; starting with those who claim to support your cause, but vote and act in opposition.

At the same time, you should be continually recruiting more members, raising more money, and expanding the areas in which you are active.

By doing this, you can win in the long run.

## Training: Plan / Prepare / Act / Evaluate

“By failing to prepare, you are preparing to fail.” – Benjamin Franklin

People and money are the lifeblood of your activities, so your ability to plan for, prepare, manage, and support these resources is critical.

### Use the following 4 tools to track progress:

- [Red Fox Four](#) – decide which battles to take on
- [Project Planner](#) – write up your battle plan
- [Five Column Analysis](#) – determine your targets
- [Project Evaluation](#) – review how well your plans went and ways to improve

## PLAN

### PEOPLE / LISTS

- What is the goal of your team?
- How will activists help you to achieve your goal?
- Activist Types
  - Donors
    - Major donors
    - Other donors
  - Activist worker bees
    - Door to door
    - Phone banking
  - Leaders
    - Managing People
    - Managing Issues
    - Managing Data
  - Direct Support
    - Research
    - Technical
    - Writing
- Finding people
  - Email recruitment
  - Direct mail recruitment
    - What is my direct mail plan?
  - Events
    - Means of collecting names
    - Petitions ready
    - Signup sheets created
  - Website recruitment

- What issues?
  - Are there existing lists?
  - Flyer drops/door-to-door recruitment
- Leadership Development
  - Leader profiles
  - Self-evaluation
    - What are my strengths and weaknesses?
    - What type of people do I need around me?
  - Areas to Expand Leadership
    - Legislative/Election
    - Administrative
      - Membership Communication
      - Direct Mail
      - Email/Website
  - Training Requirements
- Manage database of recruited supporters
  - Database designed?
  - How or who will input names?
    - Is list backed up offsite and secure?
    - Is list uploaded to C4L website on a regular basis?

## **MONEY**

- Develop a Budget
- Fundraising
  - How will we set up fundraising? Talk to your state leader for help.
  - Accountability
  - Record keeping
  - Programs
    - Online Fundraising
    - Direct Mail Fundraising
    - One-on-one Programs
    - Mass Meetings

## **PREPARE**

Determine Expected Start/End Dates for the following and prepare resources for launch:

- Leadership & Activists
  - Locations determined where leadership is needed
  - List of prospective leaders
  - Goals, standards, and policies developed
  - Training plan developed
  - Additional resources
    - Recruitment materials developed

- Computer access provided
  - Location for events/meetings determined & reserved
- Recruitment
  - Email and letter templates created
  - Response tool created
  - Events Planned
    - Dates and locations
    - Materials/Banners/Tables/Volunteers
    - Means of soliciting and recording names
    - Means to contribute
- Computer resources
  - Website development begun
  - Email accounts/email services set up
  - Database chosen
- Mail / Direct Donations
  - Recording of contributions
- Internet / Credit Card Donations, if applicable
  - Merchant account
  - Recording of contributions
- Administration
  - Regulatory (reporting requirements, registrations, annual review – nonprofit tax rules, lobbyist registration, changes in election law, ethics rules, and campaign finance disclosures)
  - Office space, if applicable
    - Equipment
    - Volunteers

#### Specific preparations for legislative session and election season

- Legislative Session
  - Draft Legislation
  - Bill Sponsor
  - Grassroots Mobilization strategy
- Election Season
  - Determine legislative target districts
  - Candidate recruitment/Interviews
  - Candidate survey
  - Identify like-minded supporters
  - Grassroots mobilization strategy

## **ACT**

Get started. Launch your plans. Here is where your leadership skills will be tested, so make sure your people skills are honed and ready.

*Note: Before launching a full-scale project, take time to double check your plans, preparations, and estimates. When possible, test before proceeding with the full scale plan.*

## EVALUATE

At the end of a project, revisit your Red Fox Four and Five Column Analysis documents to test your assumptions. This should be completed for all of your projects. There are many lessons to be learned from completed projects that should be taken into account in future projects. A [Project Evaluation Form](#) is provided in this guidebook and is also available in your online toolbox.

Similarly, it is best practice to evaluate your processes and people on a regular schedule in order to determine where improvements can be made.

### Tools: Red Fox Four

You just returned home from your local Library meeting, and you're pretty hot under the collar. The Board of Trustees has just made a proposal to build a new \$10 million "viewing room" so the township youth will have a place to gather and watch movies on weekends.

Of course, building this viewing room will mean yet another hefty increase in your property taxes, and you know it won't stop at \$10 million. Once the viewing room is built, it will have to be furnished and staffed, and that will cost you even more money. And who needs this viewing room anyway? After all, it isn't the government's job to entertain area youth, and there is a movie theater right across the street from the library!

But fighting against anything that is "*for the children*" can be an uphill battle, and that is precisely why lawmakers attempt to fit every new tax or regulation into that category.

Before you go off half-cocked, you need to properly evaluate the issue and make a plan. You need to have a clear understanding of what you stand to win or lose should your efforts succeed or fail.

Red Fox Four is a tool that will assist you in the evaluation process. It will help you to fully understand the implications you may face should you choose to take on a particular battle.

The evaluation is based on 4 specific questions:

- Win or lose, just by making the fight, do we bring people and money into our organization?
- Win or lose, just by making the fight, does it benefit our friends and allies?
- Win or lose, just by making the fight, do we hurt our enemies and their allies?

- Win and lose, what is the value of the fight itself?

Score each question on a scale of -10 to +10. Be as objective as possible when you consider each point. When you are finished, add up the numbers—the higher the score, the more likely it is a good fight to pick.

Bear in mind that the best organizations can only effectively lead so many concurrent battles. Limitations in time, talent, and treasure must be fully considered as you evaluate the issues you will fight. Your leadership and your members all have lives outside of your group, and if you take on too much, you will burn them out. That is why it is so important to choose your battles wisely, and only focus on those issues where you stand to gain the most liberty and support.

**TEMPLATE:**

**Score each -10 to +10**

Type	Description	TOTAL Score	A	B	C	D	E

**KEY:**

Type = Offense, Defense, Other

A - Win or lose, do you add people/money to your organization?

B - Win or lose, do you help your friends and allies?

C - Win or lose, do you hurt your enemies and their allies?

D - Win the fight, how is liberty and freedom advanced?

E - Lose or ignore the fight, how is freedom and liberty hurt?

*Please refer to the Sample Red Fox Four Tests below when scoring your potential battles.*

### **Sample Red Fox Four Evaluations**

Use these examples as a model for your own Red Fox Four evaluations. Results are inherently subjective, but try to be as objective as possible. Remember that you are scoring for your group in your area's conditions—both important considerations. Do not assign 10's unless you are sure there is no other issue that could score higher (or lower for -10's).

## **Case 1: De-fund fusion centers**

Win or lose, just by making the fight, do we bring people and money into our organization?

*+3 Fear sells, and nothing scares people like the opposition party in power spying on them, and nobody likes the thought of private, local, and national law enforcement merging. But few people know what fusion centers are, and that's a major setback. That the government is going to herd us into jail/detention/camps sounds nutty to most folks.*

Win or lose, just by making the fight, does it benefit our friends and allies?

*+2 It's a very obviously noble cause, and it's bipartisan, giving civil liberties group on both sides something to agree about. Civil liberties groups tend to be overwhelmed with potential battles and taking one off their hands is a relief to them. But how would it compare to Obamacare repeal?*

Win or lose, just by making the fight, do we hurt our enemies and their allies?

*+3 Because fusion centers are just about indefensible, and overwhelmingly unpopular, it has potential to hurt. But again, few people know about them. It might give some statist politicians a black eye if they defend it, state police too. But most will just duck.*

Win and lose, what is the value of the fight itself?

*Winning is a +5. Not higher because all things considered, cooperation among federal, state, local, and private law enforcement is still four groups of people with sloppy records, sharing sloppy information, and fusion centers aren't really THAT much worse than things were before they appeared.*

*Still, it's a dangerous trend that needs to be confronted.*

Losing is a 0, since nothing will change if we lose.

Total score: +13 winning, +8 losing. A good, solid, middle-sized fight. A good state group could do 2 or 3 of these per cycle.

## **Case 2: Enormous tax increase: doubling of state income tax to cover huge budget shortfall**

Win or lose, just by making the fight, do we bring people and money into our organization?

+10 *People hate taxes and a potential doubling of state income tax is an ENORMOUS tax increase, and a job killer for the whole state. This will make a lot of people furious.*

Win or lose, does it benefit our friends and allies?

+10 *Virtually ALL proponents for limited government would benefit from the attention that would be called to the state's budgetary problems.*

Win or lose, does it hurt our enemies and their allies?

+10 *Again, since a budget so botched as to require a doubling of taxes is an indictment of all costs of government.*

Win and lose, what is the value of the fight itself?

+10 -Win, as it would be a victory against a devastating tax increase.

+0 - Loss Losing is just as bad as having not fought at all.

+40 WIN OR +30 LOSE. Obviously a great fight... if they'd just pick it.

This is why politicians would never dare attempt such a radical tax increase in the first place. With more moderate tax increases, these scores would be much lower, and based on much more careful consideration.

This makes an important point: Your numbers have to be considered in light of how other possible battles might score. The taxpayer cost at stake in any given battle has to be considered in all of these tests.

These numbers depend upon the amount of change, whether how much taxpayer money spent or how much liberty is at risk.

### **Case 3: State law to include TSA workers in state law against sexual assault and battery**

Win or lose, just by making the fight, do we bring people and money into our organization?

+3. *Not that many people fly, and although it ticks us off, many see flying as a choice. It could go higher if TSA doesn't back down. We need issues that excite our members and attract people who want to get involved.*



Win or lose, does it benefit our friends and allies?

+4. *It's a good, high-profile issue.*

Win or lose, does it hurt our enemies and their allies?

+4. *It might well be used to knock some bad politicians out of office.*

Win and lose, what is the value of the fight itself?

+7 - Win *It would create new limits on power of the TSA to molest citizens, and interpose the state between the federal government and the people, thus advancing the cause of state sovereignty.*

+0 - Loss *The TSA just continues their groping.*

**Case 4: A proposal to make sure every legislator has their bills heard in committee.**

In Oklahoma, the incoming House Speaker wants to give more control of the agenda to the GOP floor leader, partly because the Speaker doesn't want to spend time on social issues. To counter this, one rep is pushing for legislation that would mandate that every legislator will get at least two bills heard in a committee per year.

Win or lose, just by making the fight, do we bring people and money into our organization?

0 *The issue is poorly understood, nobody is interested, it's no Tea Party cause.*

Win or lose, does it benefit our friends and allies?

+2 *if you define "friends" as minority members of GOP who want to advance issues that the Speaker doesn't want to discuss.*

Win or lose, does it hurt our enemies and their allies?

-4 *It allows leftists to have their issues heard, too.*

Win and lose, what is the value of the fight itself?

0 if it passes. *It does not mean any issue advances.*

+3 if it fails, because it makes our amendment votes on the floor mean more because “we had to bypass the committee process.”

## **EXAMPLES OF NEGATIVE-SCORING FIGHTS**

Win or lose, do they bring people and money into our organization? A negative-scoring fight on this criterion will be something obscure, poorly understood by the public, unpopular, trivial, radical, affecting only a small percentage of the public, or unrealistic.

Examples: Abolish Pell grants; abolish minimum wage laws; tell Barack Obama to dissolve the Department of Energy (unless you are an energy group planning to target wealthy extraction and builders' interests); oppose a cigarette tax (unless you are a tobacco group targeting smokers)

Win or lose, do they help our friends and allies? A negative-scoring fight hurts our friends and allies by distracting from their goals, polluting the minds of their organizers, and making conservatives look ignorant or bigoted. The Fair Tax, for example, drives big wedges among conservatives for a negative score in this department.

Win or lose, do they hurt our enemies and their allies? Actually, most fights help our enemies because controversy tends to invigorate both sides. For example, any anti-abortion fight that's making progress will fire up the pro-abortion grassroots against it. Exceptions, where this criterion supports the fight, are when the opposing cause is indefensible and has no grassroots support (Fed secrecy, fusion centers, national ID).

Win and lose, what is the value of the fight itself? On winning, see your state legislature's journal for a long list of relatively unimportant votes. On losing: in most cases losing is zero, because the outcome is the same as if you hadn't fought at all. One possible exception is ballot initiatives, which when they fail send a clear message to the legislature that "the people have spoken" and seal the issue for the next decade or more.

A “double negative” on this criterion would be California's Proposal 19 of 2010, to tax and regulate cannabis while "legalizing" it in specific situations. If it wins, it harms us because it's a huge package of taxation, regulation, and increasing state power. If it loses, it harms us because it officially repudiates health freedom and prevents the legislature from ever voting to support it, wasting millions of dollars and hours of volunteer time. The only way to get a negative score on Q4 is to support something harmful. As this was.

## Tools: Project Planner

Complete the applicable information for your local government body.

### Project Summary (Complete After the Rest of the Form is Completed)

Your Name: \_\_\_\_\_

State: \_\_\_\_\_

Proposed Project Name: \_\_\_\_\_

Proposed Project Summary (Summarize in one paragraph):

\_\_\_\_\_

Your local government body Rules (link, if available): \_\_\_\_\_

Your local government body's Parliamentary Procedure (link, if available):

\_\_\_\_\_

Goal: ☐ Just a Roll Call Vote ☐ Seriously Pass/Defeat Legislation ☐ Get targets on record

☐ Obligatory Battle ☐ Small Side Fight

### **PART I - Dates (Legislative Deadlines)**

Date range to request legislative drafting (most states have legislative service bureau and have deadlines for requesting bills to be drafted): \_\_\_\_\_ to \_\_\_\_\_

Date range for bill introductions (most states have specific dates when the bill is sent to the bill sponsor, who gets bill number assigned by House or Senate leadership): \_\_\_\_\_ to \_\_\_\_\_

NOTE: If your state does not follow this process, what is the process?

\_\_\_\_\_

Dates of Legislative Session: \_\_\_\_\_ to \_\_\_\_\_

Date range that bill must be considered by committee (most states have dates where a bill has to be considered by committee in order to be considered by the House of origin):

\_\_\_\_\_ to \_\_\_\_\_

Deadline that bills must be considered by house of origin (also called Switch Date. House of origin is the house that it was originally introduced in re: House of Representatives or Senate): \_\_\_\_\_

Deadline that bills must be considered by opposite house committee: \_\_\_\_\_

Dates for hearing by opposite house: \_\_\_\_\_

Conference Committee Deadlines (if there is a difference between house version and senate version of the bill, it is hammered out in a joint conference committee): \_\_\_\_\_

Important notes about Parliamentary Procedure to keep in mind: \_\_\_\_\_

## **PART II – Issue**

Red Fox 4 Analysis – Date completed and who did it

- Raise Money or Get New Members (-10 to 10) \_\_\_\_\_
- Help Legislative Friends (-10 to 10) \_\_\_\_\_
- Hurt Enemies (-10 to 10) \_\_\_\_\_
- Value of Policy if We Win (-10 to 10) \_\_\_\_\_
- Damage to Liberty if We Lose (-10 to 10) \_\_\_\_\_
- Total** \_\_\_\_\_

### Five Column Analysis

Totals Number of	++	+	0	-	--
House	—	—	—	—	—
Senate		—	—	—	—

Rating	Explanation
"++"	Without a doubt, will vote for our bill because they've already been tested
"+"	Will likely vote for our bill, but can't count on them for procedural motions or to go against leadership
"0"	Unpredictable or position unknown or no voting record or "any way the wind blows"
"-"	Will likely vote against our bill, but under pressure could vote right because they may be worried about their election
"--"	Definitely voting against us, leading the opposition, we won't waste our time here; probably in a very safe district

Is this an issue you can pass or just want the roll call vote? (If it is just a roll call vote, their vote can be used against them)

Is this a public fight, or do you just want the policy? (Some issues are not good issues to fight publicly because it may hurt our legislative supporters and/or our organization, so can it pass quietly?)

Have you consulted with your state or county coordinator? If not, email or call them. If you don't currently have a state or county leader, contact Deb Wells at [deb.wells@campaignforliberty.com](mailto:deb.wells@campaignforliberty.com).

## **PART III - Bill Sponsor**

Name(s): \_\_\_\_\_

Tough, solid on issue?

Are they vulnerable in Primary or General?

Knowledge of rules and procedures (SEE PART V)

Will they look good on TV or debate?

Special quirks or other issues they care about?

Are they willing to challenge leadership?

Please give an example of when they have carried tough legislation in the past and forced a recorded roll call vote:

#### **PART IV – Grassroots Involvement**

Have you tested the issue with an online petition? (online petitions may be posted on the C4L website via your State Coordinator)

When?

Schedule of emails to be sent (based on legislative deadlines)

Introduce subject

We need a bill sponsor

We need co-sponsors

We need the bill out of committee

We need the bill out of the house of origin

We need a roll call vote

Events related to issue (re Tea Party Rally, state fairs, and like-minded gatherings)

Other interested parties:

Groups Opposed:

Groups who “support”:

Coalition Partners:

## **PART V - Rules and Restrictions (getting the roll call vote)**

(Discussion with consultant highly recommended)

Amendments (how the general amendment process works, including possible types of rules):

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Dates that amendments may be considered: \_\_\_\_\_

Can legislative leadership kill a bill (known as a pocket veto of a bill, or chairman's prerogative) or keep a subject from coming up by voting a bill down in committee or can they keep it from being heard in the full house by "reporting continued progress" (term used in some states to kill a subject)? In some legislatures, if the bill is killed, it cannot be brought up again in the full house is this true in yours? Is there a mechanism to circumvent the leadership known as a blast procedure?

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Rules and/or precedent on amendment subjects? (Rules regarding bringing up a specific subject in a bill amendment). NOTE: Many states have "single subject rules" in their state constitution that prevent multiple issues from being considered in one bill.

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How do you suspend the "rules for consideration" of a bill or amendment? (Suspending the rules for consideration allows a bill to come out of committee / be heard on the floor; may require a majority or super-majority vote to pass)

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What is the process for requesting a recorded roll call vote, and how many members of the legislature does it take to request a recorded roll call vote? (A roll call vote is a journalized record of how each legislator votes on amendments, motions, and bills.)

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Based on your research, what is the best way to get a roll call vote?

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## **Part VI: People**

Who do you need to do what in this fight? (define needs, skills needed, amount of time tasks will take)

What leaders do you currently have to fill any of these roles? (Name and role you think they can fill)

What training needs to your folks have for this fight?

List potential leaders to test and develop.

**DO NOT POST TO BLOGS, SOCIAL MEDIA CHANNELS, OR IN ANY PUBLIC LOCATION OR WEBSITE. KEEP THIS STRATEGY CONFIDENTIAL.**  
**None of the above considerations or actions should be taken at the advice of any politician, sycophant, or member of the political class.**

## **Tools: Five-Column Analysis**

A Five-Column Analysis is best done immediately following an election while it's still fresh in your mind, and is imperative for proper planning on issue campaigns for upcoming legislative sessions. Properly analyzing each desired battle (using Red Fox Four) against each legislator's likely vote will give you a pretty solid idea of the likelihood of winning the issue in the legislature.

**NOTE: Download a Five-Column Analysis template from your online toolbox.**

How can you predict how any legislator is going to vote? We all know that politicians say a lot of things to get elected, but it doesn't always translate when it comes time to vote on any given issue.

In the Five-Column Analysis, you will first look for roll call votes on your specific issue. The most accurate score for each legislator is gleaned from how they *have voted* on your specific issue in the past. Look for committee and procedural votes if the issue never made it to the floor.

If there are no recorded votes on your issue, then you must look for other means of evaluating where legislators stand. (Recorded votes are ALWAYS the most desired means of evaluation.)

The following *may be* considered in the absence of recorded votes on specific issues:

- Votes on similar issues
- Candidate Surveys (yours and other groups)
- Public or written statements regarding specific issue

Remember to save links to all sources used in the evaluation process.

### How to do a Five Column Analysis

1) Make a list of every legislator in each house. (If you are working at the county level, make a list of Board Members for the Board you will be evaluating.) *Remember to rate legislators on specific issues, not just their general political leanings.*

2) Create five columns: (++), (+), (0), (-), and (- -)

3) Give every legislator a rating:

Rating	Explanation
"++"	Without a doubt, will vote for our bill because they've already been tested
"+"	Will likely vote for our bill, but can't count on them for procedural motions or to go against leadership
"0"	Unpredictable or position unknown or no voting record or "any way the wind blows"
"-"	Will likely vote against our bill, but under pressure could vote right because they may be worried about their election
"--"	Definitely voting against us, leading the opposition, we won't waste our time here; probably in a very safe district

4) Add up the scores.

NOTE: It doesn't matter how good you think a newly elected legislator may be, they do NOT get a (++) until they have proven themselves by voting correctly under pressure.

REMEMBER: You need to conduct one of these analyses for each issue. You can't judge how an issue will fare by looking only at the political party membership. And you can't say "a gun issue is similar to Dangerous ID so that will be close enough." That's not always true. And a change of one or two votes could make all the difference.

Yes, this is a lot of work. It is strongly suggested you get some help doing the research. We all have friends who spend way too much time on the Internet. Put it to good use by asking them to search for candidate statements on the particular issue. Don't let your helper give the legislator a ranking -- you need to know what the candidate said and be able to cite the source.



Always downgrade a legislator if you are wavering between two ratings.

Include notes on legislators who had a close call in the last election, who will have a closer race two years from now, and who should have had a primary challenge.

When you are finished with this, you should be able to determine:

- 1) What was the real ideological shift?
- 2) What issues did we make real gains on?
- 3) With a change in governor (if applicable) where are we now vulnerable?

There is nothing like hard numbers to provide perspective.

### **How to Use Information Gathered Regarding Votes**

Keeping in mind that Campaign for Liberty is a 501c4 organization and neither promotes nor opposes candidates for office, as you gather information regarding past votes that politicians have cast, you may use that information merely to gather information regarding potential candidates.

1. If there is a potential candidate in a district, conduct briefings at district meetings ("the incumbent really voted wrong on this")
2. Invite potential candidates to C4L meetings.
3. Send emails to let people know how the incumbent voted.
4. Recruit potential activists to help you out (you can use Facebook ads, emails, memes, postcards, etc.).

## Tools: Project Evaluation Form

At the end of the project, determine what went well and find ways to improve.

<b><u>PART I - Dates (Legislative Deadlines)</u></b>			
1	<b>Did you have complete information about legislative deadlines?</b> If not, what information was missing, where could you have found the information you needed, and what could you have done differently?	YES	___ NO ___
<b><u>PART II - Issue Planning</u></b>			
2	<b>Were your Red Fox Four evaluations correct?</b> If not, what could you have done differently in order to better evaluate the project?	YES	___ NO ___
3	<b>Was your Five Column Analysis accurate?</b> If not, what were the problems and what could you have done differently to conduct a more accurate analysis?	YES	___ NO ___
4	<b>Was your budget accurate (if applicable)?</b> If not, what were the problems and what could have been done differently to more accurately predict costs?	YES	___ NO ___
<b><u>PART III - Bill Sponsor/Issue Leader</u></b>			
5	<b>If you had a champion bill sponsor or issue leader, were they the right champion?</b> If not, what could have been done differently to ensure a good champion?	YES	___ NO ___
<b><u>PART IV - Grassroots Involvement</u></b>			
6	<b>If you created petitions for your issue, were they successful?</b> If not, what could have been done differently?	YES	___ NO ___
7	<b>Was your email plan successful?</b> What could have been done differently, if anything?	YES	___ NO ___

**8 If you set up or were involved in events related to the issue, were they successful? YES \_\_\_ NO \_\_\_**

If not, what could have been done differently?

**9 If you worked with coalition partners, was the partnership successful? YES \_\_\_ NO \_\_\_**

If not, why not, and what could have been done differently?

**10 Was your plan for social media, list-building, mailings, and robo-calls successful? YES \_\_\_ NO \_\_\_**

If not, what could have been done differently?

**PART V - Rules and Restrictions (getting the roll call vote)**

**11 Do you feel that you had a full understanding of the Rules and Restrictions? YES \_\_\_ NO \_\_\_**

If not, what could you have done differently to get better educated on the Rules and Restrictions?

**12 If you were well-versed on the Rules and Restrictions, did you confront problems with them being violated? YES \_\_\_ NO \_\_\_**

If yes, what happened and what could you have done differently, if anything?

## Coalition Building

Building coalitions with like-minded groups is usually a necessary component of successful, grassroots organizations, especially early on, when your group is just getting started. Respected organizations with similar values can provide you with certain tools and clout as you work toward establishing your own group.

When your group is still small, like-minded organizations can provide a network of activists ready to fight for your issues. They can also lend legitimacy to your issues, as they are already respected in the community.

### Some Advantages of Coalitions:

- A level of respect from important organizations and/or citizens who wouldn't know of you otherwise
- A larger network of boots-on-the-ground activists
- They are supportive of your issues and will help to get the word out
- May provide access to important resources, such as newsletters and lists
- Possible media exposure

But while there are many positive things that come from building coalitions, there are some potential pitfalls as well.

### Some Potential Disadvantages of Coalitions:

- Many are without resources and don't know how to get them
- Their enemies will become your enemies
- Their scandals will become your scandals
- They will try to focus you on their own agenda rather than helping with yours

You must pick your coalition partners very carefully, and take care that you are not co-opted by your enemies and bled dry by your friends. It is unwise to form any kind of permanent or formal coalition—if a relationship with a coalition partner is perceived to be too close, you will be held accountable for their dirty laundry by their enemies in the court of public opinion. Their scandals become your scandals, and their enemies become your enemies.

Often times these partners will expect you to continue working on their issues, and many will try to glom onto your membership to accomplish their agenda. **Never give them access to your lists or direct access to your activists.**

### Avoid the Pitfalls:

- Approach leadership 1 on 1 – not in a group setting
- Do **not** build formal, permanent relationships
- Be sure you find out where their loyalty is – is it their party? Certain lawmakers? The cause?

- Never ask questions in a group setting you don't know the answer to
- Know your goal, and what you need out of the relationship in advance of approaching them – **do not** approach and let them determine the agenda
- If a potential partner does not support liberty candidates – keep your distance
- Some will act like they are your friend – but they will reveal your plans and warn your enemies – be very careful about what information you share.
- **Access-based groups will not go against a political “friend”** – be very careful with these groups

With the above-mentioned cautions in mind, you may wonder if it is worthwhile to build coalitions at all. The answer, in short, is yes. Lawmakers pay close attention when large numbers of constituents and organizations are talking about the same thing. Working with coalition partners will demonstrate strength through numbers and may bring you closer to winning your battles.

### Training: Transforming Your State Political Party

Campaign for Liberty is a non-partisan organization, however, we work to advance the cause of liberty in the public square, wherever and whenever liberty needs a voice. As an organization, C4L does not support one political party over another, and we even support the right NOT to belong to any political party. Please keep that in mind as you read this section.

Involvement in state political parties is invaluable in transforming the liberty landscape within your state. An engaged party member or party leader will have more influence when discussing issues with other party members during legislative season. As an elected voting party member, your vote is critical during election season.

Liberty needs a voice, and in order for that voice to be heard within your legislative bodies and by those in your party of choice, it is important that liberty activists participate.

The voice of liberty has been (and continues to be) marginalized in many parts of the country, and part of the reason for this is a lack of understanding of the complete picture of how politics works.

Like it or not, we live in a two-party system. Elected legislators are typically either Republicans or Democrats, with very few exceptions. Laws have been written ensuring that these two parties will never face real competition from any other group. Some supporters may choose to ignore this truth, but the reality is, to be successful, the establishment must be beaten at their own game.

Most sitting legislators gained the enthusiasm and support for their candidacy via their local party. Without the support of local party officials/activists, there is little chance they would have won their race to begin with.

The good news is liberty can be advanced within political parties. Liberty activists can advocate for our ideals, become a source of influence, and even take over leadership roles within a political party.

For instance, activists who have grown weary of GOP Establishment tactics, such as their attempts to silence the voices of liberty-minded grassroots members, can and should become the majority in their local and state party structures, and transform the way their state party operates. THIS will become one major factor in how elected officials vote.

It is incumbent upon you to get involved in your party, but more than that, to bring in enough activists that the liberty-faction makes up the quorum.

Party politics is not that hard—activists merely have to show up at the right place, at the right time. If the ideals of liberty are going to win in party politics, liberty-minded activists must show up with more people than their opponents.

You need to find activists who share the vision and are staunch defenders of liberty, understand the need to be active in party politics, and *project themselves well*. The activists you want to recruit must be willing to show up time after time for important meetings, and not give up in the face of adversity.

Those neighbors who adamantly reject the need for party involvement should not be pressured into changing their minds. These people are more likely to negatively confront the “old guard”, putting them on edge, and making it more difficult to sell the liberty message. Party involvement is where you will catch more flies with honey than vinegar. The point is not to go in, guns blazing, but rather, to patiently change the conversation from within, and eventually have a majority of liberty-minded people making the decisions.

**To transform the party, activists must be involved in the local party, attend local meetings, and run for party seats.** Transforming the party cannot be done by attending a convention every-other-year.

Existing party members look for activists who will actually *get involved* and help in areas that are needed.

### **Your State Party Structure**

There are certain party rules and deadlines that you should familiarize yourself with in order to support the efforts of local grassroots activists, effectively plan certain battles, and fully learn the political lay-of-the-land.

You should learn:

- How and when party leadership is elected at the precinct, county, and state levels
- How and when the different parties select nominees for state level offices
- How legislators are replaced should they step down before their term is over
- When political party conventions are held
- How party resolutions are introduced and passed
- The party by-laws
- The laws in your state specific to parties
- And of extreme importance—LEARN PARLIAMENTARY PROCEDURE ([See the Suggested Reading List in the Appendix](#))

*Note: Be sure to research the State Central Committee with the same rigorous criteria (and enthusiasm) that you used for elected legislators and officials, [noted in the previous chapter](#).*

*Refer to Steps 2 and 4 of your Local Coordinator Boot Camp Workbook for a more complete list of critical data to research and track.*

## **Training: Activist Schools**

One-Day Activist Schools are essential for recruiting and training purposes. Through these schools, you can find and equip other local activists who will assist you in carrying out your battles.

Key components of successful political training are found in the training provided by Campaign for Liberty around the country through its consultants at The Foundation for Applied Conservative Leadership (FACL). FACL draws upon the valuable organizing lessons learned from political activists from a number of liberty organizations and shares that collective knowledge with you. Attending a training class also makes you eligible to receive additional emails with tips and lessons learned in legislative battles and how to effectively organize on the state and local level.

FACL is committed to bringing a high-quality, personally experienced instructor to any group that can bring together 35 (or more) activists on a given Saturday or Sunday.

Every year you should do an evaluation of who from your team would benefit from this training and do what is necessary to get them there, either in your respective state or a surrounding state. You should attend yourself. Each year you acquire new experience from fighting the local political machine and lessons from the training will register a newfound truth with you, a truth that may have escaped you at a previous training.

To organize a class in your area, [fill out the form at this link](#).

Each one of us has a limited amount of time, talent, and treasure to spend on our political efforts. The activist schools will teach you the models that, once implemented, will make sure you get the biggest bang possible in terms of using your precious resources.

## **Chapter 5: Manage and Build Your Network**

### **Encourage an Activist “Community”**

Think about the most successfully organized groups. These include churches, veteran’s groups, college fraternities/sororities, and more.

In addition to tireless recruitment efforts, each organization strives to create an environment, which not only enables the purpose of the group, but also fosters social cohesiveness. In other words, they function as a community, even beyond the stated purpose of the group.

The community aspect exists because people build bonds with each other, find other common interests, become friends, and eventually begin to interact outside of the group. This increases comfort, which in turn increases creativity. You’ll also notice members sharpen their philosophy and communication skills.

Fostering a community atmosphere will form a cohesive bond between local liberty supporters. Keep this in mind as you establish a vision for your area and as you plan ways of expanding and sustaining membership.

Make sure your fellow activists are constantly aware of this. The atmosphere of C4L should always invite others to join and take part. Leadership should welcome and interact with new faces in the group, as well as set a good example for other members.

When you plan events, think of ways to encourage social interaction. For example, use some inexpensive nametags until members become familiar with each other. If you go out to petition or flyer, encourage the leadership to pair up with newer members, not just their friends.

Make certain your events reflect well the character of C4L. Be moderate with their frequency, and make sure exclusively social events don’t make up the bulk of your activities—remember our goal is to expand the liberty movement and achieve our public policy agenda.

Find ways to simultaneously encourage social interaction and engage in political activism - something that doesn’t involve chairs and goes beyond what you typically do when standing around tabling.



**Example:** Construct a large and time-intensive activist project which will require multiple people and several days to complete, such as:

- Participate in a petition drive for your signature legislation
- Design large numbers of C4L flyers and posters for you and local supporters to hang around your community
- Attend a rally or public hearing and look for new members

Developing an activist community is especially important for recently assembled teams.

To form a strong team, you must work closely and communicate frequently and directly with your network. The more quickly activists become acquainted, reveal their leadership strengths, collaborate, and build on team ideas, the more quickly you can grow your team and impact your community.

As you bring in new members, be aware that you do not want your team to appear exclusive or privileged. Cliquish groups will not thrive.

Develop the idea of a “community” ultimately to sustain the middle section of your group, as new people join and older members move or become inactive.

If the community idea is ignored, you risk losing valuable members through attrition who will find other, more personable groups to connect with. These teams eventually die when the leaders leave.

## **Recruiting**

Americans have been waking up to the fact that things are not as they should be in their county, state, and the nation as a whole for some time. Some of these individuals have already found their way to C4L or other liberty-minded organizations, while others are trying to affect change in their backyards, sometimes with no support network.

Within each community across America, there are future liberty activists who have not yet received our message or heard the call to action. In this era of the Internet, it is easy to be misled into thinking that an online presence is all you need to attract and inform new members, especially when you look at the sheer volume of blogs and comments that seem to support our position.

But limiting your recruitment efforts to the Internet can lead to stagnation. There are many potential members within your area who are not plugged in to Facebook, Meet-Ups, Twitter, or blogs, and worse, many of the seemingly most dedicated online supporters limit their activity to “keyboard activism.”

Yet, many leaders make the mistake of limiting the search for new supporters to social networking sites and blogs, unintentionally excluding activists who are much more likely to perform “boots-on-the-ground” tasks that are extremely necessary in order to win specific battles.

As you proceed with your recruiting efforts, ensure that you have a well-rounded plan that includes the many different venues where you may find future activists. The Internet can be a powerful tool in your activist toolbox, for recruiting and organizational purposes, but all things must be put into proper perspective and utilized accordingly.

**Tip: To Find Local Activists, Meet Them Where They Are**

### **Town Halls, Hearings, and Legislator Events**

One often overlooked avenue for meeting local activists should actually be the most obvious. You can expect to meet like-minded individuals at Town Hall meetings, legislative hearings, and legislator events etc. While it is useful to attend these events to keep abreast of issues, you can also recruit like-minded people who turn out due to interest in the latest issues being discussed at these events.

Obviously not every neighbor you meet at these events will agree with you on the issues, but you can determine those who share your positions by paying careful attention to their questions, reactions, and comments. This is an easy way to build your supporter and activist networks, and you will be attracting citizens who are already active in their communities.

Go to these meetings equipped with pertinent petitions and literature about your issues, and don't forget your membership forms, business cards, and C4L fliers. When you meet a like-minded individual, make certain he or she is able to get in contact with you, and try to “close the sale” right there at the meeting if possible, by getting their name and contact information on a petition and/or sign-up form.

As your local network grows, it is essential that you train and equip local activists to attend the many different pertinent meetings throughout your area. You are only one person, and you probably cannot personally attend every meeting. In order to have maximum impact on every level, you must properly arm the troops and delegate tasks accordingly.

### **Door-to-Door Canvassing**

Door-to-door canvassing is another key avenue for recruiting your neighbors, and meeting liberty activists where they are. This is where you should live and breathe. As you recruit and train new local activists, you should put them to work immediately within their own neighborhoods.

Walking door-to-door allows new leaders to introduce themselves and the issues to their neighbors, and it enables them to easily identify those who share our positions. As discussed above, activists should carry relevant petitions, literature, and membership forms.

### **Political Organizations**

Potential recruits might be found in established party organizations, College or Young Republicans, Tea Party or 9/12 groups, and other politically focused groups.

Established political party organizations provide fertile ground for your recruitment efforts. Their primary objectives differ from ours—they exist to get their people elected to office, while we exist, in short, to keep them honest once elected. Many people who are involved in their local political party are passionate about limited, constitutional government, and C4L would simply augment their current role.

Political party meetings are attended by all types of people. Some of these people will enthusiastically support your efforts, while others will fight you, but they all have one thing in common—they are all activists who are already involved in the community. With the right approach, you should be able to identify and recruit members from within these organizations.

While it is fair game to attend Tea Party-type meetings and recruit from them, remember that you are attending functions being hosted by like-minded groups. You can expect to meet people who support your positions, but your approach must be tempered with the understanding that their existing leadership may feel threatened by your efforts.

Use discernment when dealing with organizations whose goals and objectives are similar to ours. A high-pressure approach to attracting their membership to join your group could do more harm than good. Be cautious not to destroy existing goodwill between you and these groups. With a positive relationship, you can work with them on important local issues, and it may not be worth the loss of goodwill to gain a couple of new members.

### **Community Organizations**

Effective recruitment requires you to increase your visibility within your community, establishing a rapport with your neighbors that builds trust and goodwill. You can expect to find citizens who care about your community within non-political organizations, such as churches, clubs, charitable institutions, food banks, etc.

### **Tabling at Community Events**

Community events, such as fairs, gun shows, bazaars, farmer's markets, etc., provide great opportunities for you to attract new members and introduce yourself and C4L to your neighbors. From large cities to sleepy townships, you can expect an event in almost any season.

It is important to plan and prepare for these events as early as possible. Some events require your reservation months in advance, so be sure to check out community calendars so you don't

miss out on valuable opportunities. Be sure to take note of any special rules for each event, such as a requirement to purchase insurance, or prohibitions on specific items.

Equip your table with plenty of literature about your group and your latest battles, and include relevant petitions and sign-up forms as well. Be sure to keep your table tidy and attractive, but don't use your table as a crutch. Be friendly, and plant the seeds of liberty by presenting attendees with your literature, but don't expect a long line to form at your table. Be sure to mingle with the crowd for best results.

Keep in mind that your neighbors did not go to the State Fair, Farmer's Market, or Craft Show to join a movement. Their primary focus is on corn dogs, seeing old friends, and having fun after a hard week of work. High-pressure tactics usually do not work at these events.

## **Social Media**

Create a Facebook, Twitter, Meet-up, or similar social networking group to provide a platform for online communication. Invite all of your friends, existing and new members to join, but remember that not all of them will do so. Be sure to communicate all relevant details about your activities and needs in other forms as well, such as email, phone calls, and informational updates at your meetings.

### **Facebook**

**IMPORTANT:** When you create a Facebook page or group using the Campaign for Liberty name, please appoint Deb Wells as an "administrator". Go to Deb's Facebook page, "friend" her page, then you can appoint her: <https://www.facebook.com/deborah.wells.75>.

Facebook posts should be monitored by someone on your team, so make sure you've appointed someone who has time to do that.

**REMEMBER: Facebook shouldn't be used as a debate forum. It should be used for list-building purposes, fundraising, and delivering pain. Use it only for posting, not commenting.**

Facebook "Help" contains good instructions for using Facebook effectively to "market" your group.

For additional one-on-one assistance with Facebook basics, or tips for creating ads and posting Facebook memes, contact Ted Patterson at [tap@facitraining.org](mailto:tap@facitraining.org).

## Track Your Progress

Current and complete data concerning your supporters and voters in your area is important. You need to maintain very accurate records about the issues that are important to your supporters and how to contact them.

Step 6 of your Local Coordinator Boot Camp Workbook provides a spreadsheet for storing contact information and other details. If you need more room than the workbook provides, Microsoft Excel is probably the most desirable program for spreadsheets, as it is used universally. Google Drive may be useful if you have more than one person who will work on and use your spreadsheets (be sure to keep the settings private.)

It is expected that you will be working throughout your area to attract new members. As you attract new members offline, you should enter their details into your spreadsheet.

Sometimes supporters (for whatever reason) are reluctant to sign up on the website, but they still consider themselves C4L members and want to receive email updates. In order to ensure they are counted as members and they are receiving emails, the database needs to be updated with your lists. Also keep in mind that certain laws are written differentiating organizations according to the size of their membership rolls. It is extremely important for C4L to have an accurate count of members.

Please be sure to forward your contact list to your county or state coordinator from time-to-time.

The following are the fields that HQ requests, in order:

- First name
- Last name
- Street address
- City
- State
- Zip
- Email Address

*Note that you may want to include and track more data than HQ requires. Simply remove those fields prior to submitting your list.*

Ensure that you guard all of your lists carefully. If the wrong person were to see this information, your supporters' personal information could be at risk. Ensure that any member who will view this information has a user account on our website and has signed an NDA.

You should go through your spreadsheets regularly and ensure that you follow-up with those supporters who expressed an interest in your group. People are naturally more motivated to contribute their time, talent, and treasure when they receive a little personal attention.

## 12 Basic Needs of Every Volunteer

Now that your recruitment efforts are paying off, how will you keep your new volunteers motivated and working toward your shared goals? The following list includes 12 basic needs of volunteers that you should consider in your planning.

### Provide your volunteers with:

1. A specific manageable task with a beginning and an end
2. A task that matches interests & reasons for volunteering
3. A good reason for doing the task
4. Written instructions
5. A reasonable deadline for doing the task
6. Freedom to complete the task when and where it is most convenient for the volunteer
7. Everything necessary to complete the task without interruption
8. Adequate training
9. A safe, comfortable, and friendly working environment
10. Follow-up to see if the task is complete
11. An opportunity to provide feedback when the task is finished
12. Appreciation, recognition, and rewards that match the reasons for volunteering

## Things That Can Frustrate Volunteers & What To Do About Them

**Bureaucracy and red tape.** Involvement can seem clouded by real or perceived barriers to getting involved.

~**Solution:** Ensure that the mission statement and guidelines are easily accessible so they have a working knowledge of what to focus on. Red Tape is an unavoidable evil in a c4 organization, as there are laws that must be followed, so make things easier on all volunteers by going over the guidelines and making members aware of where applicable information can be found.

**No clear vision; lack of focus.** When projects lack clear focus or direction, they immediately appear less attractive.

~**Solution:** Before presenting a project to your team and asking for volunteers, provide them with a clear idea of why you think the project is important, a general plan of attack, specific needs to accomplish it, and a timeline. Set clear goals for your group, along with a timeline for completing the goals.

**Not fun.** While it is understood that the primary reason for involvement is not for fun, members don't want their involvement to be painful or a negative drain on their energy and passion.

~**Solution:** Be sure that your events and projects provide an atmosphere of goodwill and excitement. While serious conversation obviously can't be avoided, being ultra-formal, dry, or stuffy will cause severe burn-out and will result in a significant disconnect in the membership.

**No clear end to a project or commitment.** Open-ended projects and/or commitments can be intimidating to volunteers.

~ **Solution:** When deciding on projects to work on, ensure that each one has a clear plan with a beginning and an end.

**Not open to innovation and creativity.** Leaders that micro-manage tend to kill passion and energy.

~ **Solution:** All members should be encouraged to contribute ideas for projects, as well as ideas on how to implement agreed upon initiatives. Not every member HAS to accomplish a goal in an identical manner (i.e., if the initiative is to gather signatures on an important petition, 5 members may choose to man a booth, and 1 member may choose to visit the local bowling alley on a Friday night. Both of these things can net positive results, so there is no reason to discourage either activity).

**Bad meetings or bad planning.** Lack of organization or poorly run meetings will quickly frustrate members and cause a fall-off in participation.

~ **Solution:** Provide a clear agenda in advance of any meetings and stick to the agenda. When things begin to deteriorate and go off-topic, bring the meeting back in line with the agenda, while letting members know they can have their discussions once the meeting is over. The agenda should focus on tangible plans and ideas that will contribute to achieving goals rather than side-issues. Start on time, and end on time. Be sure to have a “Plan B” in the event that a prearranged speaker is not there, or something else goes wrong.

**Patronizing Attitudes/Lack of Appreciation.** Being patronized or treated with paternal or maternal attitudes makes people angry. Leaders who fail to recognize the valuable contributions of volunteers are seen as a real challenge.

~ **Solution:** Understand that each volunteer will not always share your vision for how something should be accomplished, and just because they address things differently does not make them wrong or ineffective. Recognize and acknowledge the many different talents and contributions of every member.

**No Sense of Connection to Others in the Organization.** Little patience is held for the “good-old boys” network or cliques within the group.

~ **Solution:** Be friendly and inclusive towards all members. Don’t always call on the same people, or implement the plans / ideas of the same people. All members should be recognized and their value acknowledged.

**“Pay Your Dues” Mentality.** Outdated leadership calls for a length of time of “service” or time spent climbing the ladder within the organization before their value is recognized or responsibilities given to them. This leads to burnout and frustration.

~ **Solution:** When a member has a passion for the cause, they want to be effective from day one. Never place arbitrary rules over them. Create avenues for engaging volunteers early on in their involvement, and then step back and watch them flourish while your membership grows and your goals are accomplished.

**Perspectives Not Respected.** When members feel that they have the skill and knowledge to make meaningful contributions but were never given the chance to do so or worse, they were snubbed or ignored, this can cost membership, momentum, and forward movement.

~ **Solution:** Recognize the value of each member. Realize that while opinions and techniques may vary from your own, there is usually more than one way to skin a cat.

## Building Your List

**NOTE:** *As you build your lists under the Campaign for Liberty name, be sure to send frequent updates to your State Coordinator to upload to the C4L website.*

This will ensure emails and mailings will go to all of your contacts in the county.

When you collect names, put them in the following order in a spreadsheet (this will make it easier to upload your lists to the website):

**salutation first last suffix addr1 addr2 city state county zip tel1 email**

If you have any questions about uploading lists, contact [Deb.Wells@CampaignForLiberty.com](mailto:Deb.Wells@CampaignForLiberty.com).

Every engagement leads to another and so building and maintaining lists of supporters is crucial towards winning the next fight – regardless of what happens in the present moment.

Building your list is not a onetime project. It's an ongoing operation, and it's an investment in the causes you care about.

Remember: the only thing separating you and your team from any other activist is the amount of supporters you can bring to bear. The more the merrier.

If no one is following you, if you don't have a list of supporters who you can mobilize, you're not yet an effective leader in the political arena.

There are three kinds of lists that you should be working on developing at all times: donors, activists, and volunteers.

Each of these categories enables your team to carry out your mission.

But how do I start doing this, you may be asking?

One name at a time!

The key is to get out there and try. You'll be able to perfect your technique a lot once you have some experience.

Here are some tips to make your list gathering a success:

- 1. Give people something to physically sign!**



Choose an issue people are passionate about. Have them sign a physical petition addressed to their representatives insisting that the legislature defeat or support a related bill. And then deliver it to the politicians.

This gives people something to sink their teeth into, and really become a part of the movement.

## **2. Be aggressive!**

If you are at an event, you can't wait for them to charge up to you, or your table at an event, desperate to get involved in the fight for liberty. It just doesn't work that way. You may be wired that way, but you're not normal! So be sure you aggressively court people's attention – work the crowd, or if you have a table at an event, stand in front of the table and get people's attention.

Remember, you're asking them to get involved in the fight to defend freedom in their community, so you shouldn't feel bad about asking for a few minutes of their time.

Some people will gladly sign your petition and some will scoff at your efforts and refuse to sign up. So what?

That's the name of the game – don't get discouraged just because you strike out with some people.

## **3. Be visible!**

You don't need a giant inflatable banner, but you need to visit. If you're at a table at an event, have a display that projects a level of professionalism and seriousness so people know that you're going to be using their information in a serious manner. If you are working the crowd, wear bright clothing or easily-recognizable hats or clothing.

It's nice to have something to hand folks who sign a petition. Whether it's a simple tri-fold on your organization, a decal, or whatever – you come across as a serious organization and will recruit more members this way.

## **4. Always ask for donations!**

The vast majority of folks you interact with will not donate. But that's ok, you would have received zero donations if you were not asking!

You will usually off-set all of your expenses by the handful of folks that contribute.

In other words, you'll build your list at NO COST thanks to these donations.

## **5. Utilize your volunteers!**

Many volunteers are going to be nervous and will need some coaching on what to do. For those that stick it out, you can't say thanks enough! Be sure to reward them in some way for helping out – it makes it easier to get their help next time.

Cultivating and maintaining this volunteer list is key to your overall list building strategy.

Besides being a lot of fun, these list-building efforts cost very little. If you are just starting out as a group, this can be a great way to team build and explode your list with minimal money.

It's even more effective if you can attend events in districts where you know you'll be active during coming legislative cycles – every one of the names you gather there can be put to use right away!

The key is to just get out there and try.

Following is one example of a successful list-building event:

*Continued on next page...*

## **GUN FIGHT by Patrick McGrady, Maryland activist and co-creator of the “Assault Clipboard”**

Back in 2013 on the heels of the tragic school shootings in Connecticut, the Maryland state legislature, at the behest of our liberal governor, thrust a gun ban bill onto the floor of the House.

This bill banned magazines greater than 10 rounds, banned the AR-15 platform, banned the sale of many semi-automatic rifles and shotguns, and mandated government licensure requirements for possession of pistols.

We knew this would be a big fight, and so did everybody else. The gun-grabbers were out in force all over the capital and the governor was twisting arms to get this bill through the legislature so he could feather his cap.

The access-based groups in Maryland had organized a gun rally on the day of the committee hearing in the House, with the intent of demonstrating a show of numbers to the House of Delegates.

I made a phone call to the organizer of this event (which I predicted would be well-attended, but I had no idea as to the scale) and asked how they were planning to identify the activists.

Quick sidestep: Why do I care about this information? People who are willing to brave the February weather in Maryland to come to Annapolis from all over the state just for a gun hearing are likely people I want to communicate with in the future -- they may be donors, volunteers, or at least warm bodies. All of this information is valuable to me.

His answer was SHOCKING -- they were not planning to sign-in, track, or otherwise harness the information from whoever was going to be at the rally!

After I picked my jaw up off the floor, I volunteered to collect petitions (not to share them with the organizers, but to collect them), and he agreed.

### **TIME TO GO TO WORK**

I hung up and got to work. First, we made the petition document. We made 1,000 copies of this petition, at \$.05 per page.

We sent an email to my friends at NAGR and asked -- “Can we have some swag for a gun rally?” Not expecting anything in particular, I was pleased they agreed to send a goody bag of hats and t-shirts.

We printed with large “STENCIL” font the words “ASSAULT CLIPBOARD” onto a piece of cardstock (\$.15), then used a utility knife to cut out each letter to create a paper stencil.

*Continued...*

We bought 2 cans of flat black spray paint (\$3.29 x 2) and sprayed the back of all the clipboards with it.

Then, we laid the stencil on each and sprayed white paint over it to emblazon the words "ASSAULT CLIPBOARD".

Finally, we bought a 4-foot 1-inch diameter wooden dowel and cut it into 4-inch sections. After painting them flat black to match, we screwed these to the clipboards. Now, these clipboards were "ASSAULT CLIPBOARDS" with a forward grip.

These were no longer just clipboards, they were now scary looking "tactical" clipboards.

We had to be mindful of the law here. If we had included a high-capacity paper-clip on these, it would have been illegal in Maryland. Know the law where you practice your activism.

### **PLANNING AND PREPARATION COME TOGETHER**

Now we had all the gear ready to go:

Assault Clipboards

Petitions

Pens

Swag from the National Association for Gun Rights (NAGR)

Now all we needed was help to collect signatures. We have developed a sizable list of friendlies here in Maryland, so we emailed them looking for help with the "Assault Clipboard Brigade." (I was on a roll, I know). I promised them a hat or t-shirt for helping.

The day before the event, we had 7 people signed up to help, but we were still lugging the gear down to Annapolis without a real plan to harness the masses of gun supporters.

### **AN OFFER YOU CAN'T REFUSE**

As it turns out, on the day of the event, downtown Annapolis was packed so we had to park 2 miles away and take a shuttle. On the shuttle, I met someone who had enlisted in the brigade, and instructed him on how to collect petitions at the event. At the same time, I passed 5 clipboards around to collect signatures from the rest of the bus riders.

It was a captive audience -- how could they refuse?

*Continued...*

When we got off the bus at what is called “Lawyer’s Mall,” I saw the hordes of angry gun supporters, and grinned ear to ear. This was even better than expected!

There must have been 3,000 people there when I arrived, elbow to elbow, in a 1 acre lot.

Where do you start when eating an elephant? With the first bite.

We scouted to determine the entry points and posted at the busiest one. My two buddies and I slapped NAGR hats on our heads and started asking people to “Sign the Petition to protect gun rights in Maryland.”

### **PEOPLE LOVE FREE**

People love to help. But more than that, they love free stuff. We asked a couple of guys -- can you help us collect these petition signatures for a free hat? And immediately had 5 more guys agree to help.

Soon there were 25 people working the crowd with the Assault Clipboard, a NAGR hat, and a friendly smile, all collecting contact information.

About an hour in, I was receiving reports of low ammunition - er, petitions from the brigade. One of our activist volunteers ran into a friendly legislator’s office to make 200 more copies, and we were back in business.

Two hours later, folks were beginning to leave the mall where they stood in line to testify at the hearings, and we recovered every one of the clipboards.

### **WHAT WAS THE RESULT?**

All in all, we collected more than 5,000 new, unique petition signatures and contacts from people from every county in Maryland -- most with good and legible addresses, phone numbers, and email addresses.

This was a low-budget day -- total cost was \$56.73 plus pens I had laying around, and we added a great number of friends interested in defending the Second Amendment.

Several lessons here:

- 1) Make the petitions large enough to be able to write legibly on them. Illegible names and emails are worthless.
- 2) Have plenty of pens.
- 3) Have plenty of help. Recruit on site if you need to.
- 4) Keep an eye on your gear. It’s easy to misplace in the din of a rally.
- 5) Have fun!

Think about this sort of list building strategy whenever you see advertisements at Tea Party events, rallies, or other events. Nobody is going to do it for you; this is your job. But feel free to borrow my ASSAULT CLIPBOARDS idea.

## Chapter 6: Pick a Fight

*Refer to Steps 4 and 5 in your Local Coordinator Boot Camp Workbook for critical data to research and track.*

### Legislative Season

Typically, local governing bodies operate year-around and meet monthly. Generally, state law determines the units of local government, when they meet, and even when they must vote on specific items, such as the budget or a property tax increase. These details vary by state, so be sure to check your state laws to identify details applicable to your area. (One easy way to identify your local governing boards is to check out your property tax bill.)

You only have time to push one or two major battles at a time. Yes, there are many good and worthwhile fights, but you should only take the lead in one or two. It is too easy to dilute your efforts into a number of noble causes that will probably result in your losing focus and worse - losing the battles.

### Two Types of Legislative Battles

Legislative battles come down to two types - offensive and defensive. In the first instance, you are trying to pass good legislation; in the other, you are trying to stop bad legislation. Defensive battles are “easier” because politicians flee controversy and the status quo is the most powerful force in politics. By definition, you can’t control what legislation your opponents will push - so defensive battles are reactive.

### Determining What Issue to Focus On

The Red Fox Four has proven to be the best objective measure to determine which issues to get involved in. Simply put; you measure your potential issues on a 0-10 scale on the following four criteria: Simply by fighting this battle, will you:

- Help your political friends?
- Hurt your political enemies?
- Be able to get new people into the movement? (Will it bring in new money for a statewide or countywide issue?)
- Get good policy?

Look at your list of potential issues and give them an honest numerical score. Go with the battles that score the best.

As soon as you pick your issue(s), activate your existing local support network, and keep them informed of any news on the issue, including the date and location a hearing or vote will take place. Try to get as many of your supporters as possible to add pressure to the board members via phone calls, emails, petitions, showing up for the meetings, etc.

Be sure to use the battle to find and add to your support network.

One of the best tools to use for your battle is a well-crafted petition. Simply gather signatures in the affected neighborhoods and identify those neighbors who are supportive or opposed to your efforts. Once you've identified a supporter or opponent, be sure to record this in Step 6 of your Boot Camp Workbook. Keep the supporters informed of new details on the issue. If you identify a neighbor as being unsupportive of liberty, record that, and avoid them in your future efforts.

When petitioning, give a few details on the issue and how it will personally affect local residents.

Petitioning is a great place to start if you're new to or uncomfortable with door-to-door issue campaigning. You've identified your issue, prepared your petition, and your petition can do most of the "talking" for you. Everything your neighbor needs to know about the issue should be included in the petition.

#### Do's and Don'ts of Petitioning:

- DO provide a space for signature, printed name, and street address on the petition form that will be given to the board. (If a neighbor is willing to give you their phone # or email address, write that information on a separate sheet of paper.)
- DON'T provide more private information about your neighbors on the petition form than is necessary.
- DO avoid knocking on the doors of previously identified opposition.
- DON'T spend too much time at each door.
- DO take notes on those unfriendly to your cause so you'll remember to avoid their house next time.
- DON'T engage in heated conversations with those who don't agree with you. It is very unlikely you'll change the minds of those seriously opposed to your position, and engaging them might actually cause them to mount a counter-offensive.
- DO let the neighbors who support your issue know the date, time, and location of the upcoming vote, and ask them to attend if they are able.
- DON'T leave any literature in neighbors' mailboxes.
- DO keep notes about those neighbors who weren't home so you can revisit them another time.

Never underestimate the value of a few dozen signatures at the local level. Because most people are largely unaware of what is happening at these meetings, these local boards rarely hear from their constituents. A well-crafted petition with a few dozen signatures can be a very big deal to these board members.

When it comes time to deliver your petitions, try to take as many neighbors with you as possible.

Consistent constituent contact throughout your battle will produce "fear of the future" in board members. Remember—your supporters are also constituents, and constituents have the power to unseat politicians. *The knowledge that an irritated constituency can end political careers is always front and center in a politicians' mind.*

Your mission is to ensure that your supporters are contacting their board members often enough that officials are always on edge, and always worrying about your strength. This fear—if

properly nurtured—will eventually lead to results, either via passage of liberty legislation, or via passage of bad politicians back to the private workforce.

### Key Dates You Must Know

*Refer to Steps 4 and 5 in your Local Coordinator Boot Camp Workbook for critical data to research and track in relation to this section.*

It is imperative that you research and keep track of important dates for each of your local governing boards. Knowing the dates in advance ensures that you will be prepared for battle.

For instance, you'll need to know:

- How much public notice must a board give before a meeting or vote?
- How often/when do the different boards meet?
- When are tax levies passed?
- When is the budget voted on?

Be sure to let your support network know in advance as these important dates approach so they'll be ready to assist.

### **How to Bring Attention to Issues Using Political Street Theater**

*by Arizona Campaign for Liberty*

Street theater can be a great way to get your message out to the masses with little or no money. When done properly a handful of people can build an organization and get plenty of earned (free) media.

Use humor wherever you can, but the idea isn't to make your opponent laugh—it's to send them home crying.

Following is an example:

*Continued on next page...*



**Example:** A legislator speaks out against your bill and tries to publicly persuade others to do the same. To pay this person back and make an example out of him, plan a strategic flyer-drop. Drop flyers in:

- His own neighborhood
- The parking lot of his personal business
- The neighborhood surrounding his church, favored golf course, etc.
- His mother's neighborhood
- If it's election season, flyer-drop the neighborhood(s) where his challenger(s) live

Chances are, you don't have enough activists to place a flyer on every door in his district. The point is to *make the bad legislator believe that you **do** have the manpower, and that all of the people he interacts with often, and his constituents, have received this flyer.*

Make up a half sheet to stick on the doors of all of the houses on the block and the two streets on either side. The flyer should be a bright color, if possible, so it is clearly visible from the street. Your flyer should explain that the legislator is working for lobbyists, not the voters. Document your political theater with photos or video (just don't give out any addresses.) Then send your work, along with a copy of the flyer to the email boxes of every other legislator to show that you're willing to get the word out to their neighbors and constituents if they act in the same manner.

## **Dos and Don'ts**

Don't:

- Break any laws--it will be used against you and your issue

Do:

- Have Fun!
- Get email addresses and phone numbers
- Mock and Awe (punishing politicians is Fun!)
- Video record it (if you didn't record it, it didn't happen)
- Build a media list so you can send them your work (tread carefully)
- Stay on message--the goal is to create angry voters

Political Street Theater is an opportunity to use your sense of humor and creativity to punish politicians for their bad behavior. While your opponents will be spending hundreds of thousands of dollars on a 1-minute commercial, you and a few friends can get the same time for free.

If you want to get media attention, make your street theater into an event and bring a big crowd, if possible. Have your people prepared to speak on camera in tiny sound bites. Anything you say on camera can and will be used against you by the person in the editing chair – think of the tactics used by *The Daily Show* with Jon Stewart. If everyone stays on message and speaks in brief sound bites, chances are very low that local news will be able to twist your words to suit their pre-conceived notions.

If your street theater ends up on television news, remember you have the rights to use that footage on your website, blog, or YouTube channel. Edit out the parts that don't align with your message. The news editors do the same exact thing to your people, so don't be afraid to do it right back to them.

Street theater is about getting a message out to the right audience; it isn't always about making it on the news. Think about who your audience is. Politicians and their staff are constantly reading emails and faxes and fielding phone calls. If the photos and videos taken at your event find their way into the inboxes of every legislator at the state capitol, you've achieved the ultimate goal. How you get there is up to you and your creativity.

## **Election Season**

**IMPORTANT REMINDER: In your role as a Local Coordinator, you may not advocate for or against candidates for office. You MAY inform the public of voting history, forum answers, and things of that nature when promoting your issues. If you feel led to advocate in favor of (or against) specific candidates, you must not do so in your role as C4L Coordinator.**

With all of the useless and intrusive laws binding the hands of grassroots organizations, getting involved in elections is akin to walking through a minefield.

There is little doubt--**the regulations that bind us down were created to protect the politicians.**

And while it is perfectly acceptable for you—as a private citizen—to support or oppose any candidate for office you desire, the rules prohibit you from acting effectively in the role where you probably have the greatest influence and power to drive change.

### **So what is a passionate grassroots leader supposed to do?**

In order to make use of this season, you need to take advantage of the opportunities presented. This is the best time for citizens to lobby legislators. To take advantage of this time, you need to:

- Determine which board(s) you will focus on
- Use voter anger to your advantage
- Report the forum results to your local network
- Remind your network of the voting records of incumbents

## **Chapter 7: Policies and Guidelines**

It is our top priority to preserve the name and mission of Campaign for Liberty. Because of complex laws governing 501c4's, it is necessary to have certain policies and guidelines in place.

We value your privacy and that of each of our members.

### **A Note on C4L Member Lists and Personal Information**

All leadership, from Local Coordinators to top staff, is required to sign a Non-Disclosure Agreement. As you recruit new Local Coordinators, please have them sign the NDA on the website. (Note that the NDA MUST be signed online. The NDA copy provided here is for your records only.)

### **Campaign for Liberty Local Coordinator Non-Disclosure Agreement**

#### **CAMPAIGN FOR LIBERTY LOCAL COORDINATOR'S CONFIDENTIALITY AND NONDISCLOSURE AGREEMENT**

WHEREAS, CAMPAIGN FOR LIBERTY agrees to furnish you with data regarding your local area, training materials, and the like.

YOU agree as follows:

You shall use the data and materials only for purposes explicitly stated on the CAMPAIGN FOR LIBERTY website, including issue canvassing and related purposes, as assigned to you to carry out your responsibilities.

To the best of your ability, you shall prevent the data provided from being used for any other purpose.

You shall not disclose the data to any other person except to volunteers working in your area, in which case you shall only provide them with lists on paper and shall account for all disclosed paper copies when the project is completed.

You shall not download, possess, retain, or disclose any information of or pertaining to any Local Coordinators in your county or state, except for personal usage for the purpose of supporting the CAMPAIGN FOR LIBERTY Local Coordinator program as described by CAMPAIGN FOR LIBERTY.

You agree not to log-in to the Local Coordinator program by entering a false name, address, phone number, or email address, and give consent for CAMPAIGN FOR LIBERTY to obtain your registration information from the Internet Service Provider in possession of your IP address and e-mail domain name if this occurs.

You shall not place CAMPAIGN FOR LIBERTY official literature or materials inside mailboxes or use them in any other way that would violate federal, state, or local law.

You shall not present any literature produced by anyone for any purpose as CAMPAIGN FOR LIBERTY literature unless it is produced or approved by and made available by CAMPAIGN FOR LIBERTY.

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

## **Coordinators Running for or Holding Office**

### **MEMORANDUM**

TO: C4L State Coordinators

FROM: John F. Tate

RE: State and Local coordinators holding or running for office:

While in a perfect world no one would lose their First Amendment rights simply by agreeing to be a candidate or being in office, the fact is, much of election law flies in the face of what should be our rights as free citizens.

Campaign for Liberty does not agree with the principle – but it is clear that under current law there are many things we, as a 501(c) 4, cannot do if we want to comply with state, local, IRS, and FEC rules and continue fighting our good fight.

One of those, especially for the IRS, is to steer clear of doing things that would directly support or aid candidates.

That means that candidates for office should not have access directly or indirectly to our lists, bank accounts, or facilities, and cannot be staffers or officials of our organization during the time they are running for or holding public office.

Additionally, due to FEC rules, those who are IN office cannot do many things that would be seen as aiding our organization. This of course varies by what office is held, but the bottom line is this: Having a candidate or an officeholder in an official position within the structure and organization of either the National Campaign for Liberty or any of the state groups would cause legal issues for both the person and the organization.

It is for this reason we cannot allow anyone to be both affiliated with our organization and either running for or holding elected office. Exceptions for certain local, non-partisan offices may be made, but must be cleared by Campaign for Liberty National Staff on a case-by-case basis.

Any Coordinator who begins a run for office may be asked to step down, at least on a temporary basis during the campaign.

Obviously candidates for office, or office holders, may remain members of Campaign for Liberty.

This policy does not apply to running for or holding any party office, nor office in any other private association.

## **Coordinator Use of C4L Logo and Letterhead**

Even the best copywriters and most thorough fact-checkers make mistakes. With complex 501c4 laws, it is important that we do all that we can to catch any problems before formal communications are sent out, thereby preserving the C4L brand for all members and avoiding expensive litigation.

The State Coordinator may use the Campaign for Liberty logo and letterhead for formal statewide communications; formal communications must first be submitted to State Operations for approval.

All other Coordinators may use the logo and letterhead for formal communications in their respective areas, but it must be submitted to their State Coordinator for approval.

**All Coordinators who wish to use the C4L logo on materials must sign the *Coordinator Use of Campaign for Liberty Name and Marks* document below.**

## **Coordinator Use of Campaign for Liberty Name and Marks**

1) Any use of the Campaign for Liberty (C4L) name or other marks (including use of a title, e.g. Campaign for Liberty Halibut County Co-coordinator) in contacting the media must be submitted for PRIOR approval to the State Coordinator for revision, approval, or disapproval.

Failure to do this is subject to immediate severance of formal relationship with Campaign for Liberty, and revocation of any title. A violation after the above is grounds for a lawsuit for trademark infringement.

2) Any use of the C4L name or other marks (including use of a title, e.g. Campaign for Liberty Mackerel County Co-coordinator) in regarding an election and sent to any list by any means (e.g. recorded phone calls, email, US Mail) must be submitted for PRIOR approval to the State Coordinator for revision, approval or disapproval.

This does not cover posting of comments on blogs or websites or private communications; however, it is to be stressed that Campaign for Liberty and its activists must neither endorse nor advocate the election or defeat of any candidate on behalf of the organization. Individuals may endorse, support or oppose candidates as private individuals, but should make clear that they are doing so as individuals.

Failure to do this is subject to immediate severance of formal relationship with Campaign for Liberty, and revocation of any title and privileges. A violation after the above is grounds for a lawsuit for trademark infringement.

3) Any use of the C4L name or other marks by LOCAL activists and sent to any list by any means for legislative or other political or organizational action (i.e. not sent to press and not in regards to an election), should be submitted to the State Coordinator for revision, approval or disapproval.

Failure to do this is subject to warning for unauthorized use of trademarks. Repeated failure is subject to severance of formal relationship with Campaign for Liberty, and revocation of any title. A violation after the latter is grounds for a lawsuit for trademark infringement.

## **Websites and Web Pages**

Websites and web pages created using the Campaign for Liberty name must go through an approval process. This includes Facebook, Twitter, and all other websites or social networking pages.

Forward web links of your pages to Deb Wells at [deb.wells@campaignforliberty.com](mailto:deb.wells@campaignforliberty.com).

Please comply with all 501c4 and C4L guidelines.

### **Notes:**

**IMPORTANT:** When you create a Facebook page or group using the Campaign for Liberty name, please appoint Deb Wells as an “administrator”. Go to Deb’s Facebook page, “friend” her page, then you can appoint her: <https://www.facebook.com/deborah.wells.75>.

Facebook posts should be monitored by someone on your team, so make sure you’ve appointed someone who has time to do that.

1. Any web page or website that is created under the “Campaign for Liberty” name (representing C4L and contains C4L name / logo) is considered a “formal” website rather than an “open forum”, so require approval and are subject to the rules.

2. Since you are responsible for content of web pages created by you or your coordinators that you are aware of, please make sure that if people are allowed to post comments or blogs, 501c4 and C4L guidelines are followed (someone will have to monitor).

3. Only an officially approved Campaign for Liberty logo may be used on web pages / web sites and materials.

## Appendix

### 501(c) 4 FAQ's

Q. Can I send out press release praising candidates and thanking them for the work they have done?

A. (1) All press releases must be sent to Deb Wells for review; (2) Praising candidates is not recommended (the politician may use it against you in the future). Providing legislative positions is acceptable, if you mention all candidates; (3) The further away you stay from praising candidates rather than praising them on policy positions, the better. [NOTE: This does NOT apply to the very few legislators who are our issue champions]

Comments: (1) Press is the most overrated part of politics. We are heavy readers but most are not; (2) Don't make a habit of praising. When you praise politicians, they take it and use it as a badge to show they are good when they really aren't good. Concentrate on pointing out the negatives. ["If you can't say anything bad about a politician, it is better to say nothing at all."]

Q. Can I send an announcement of speaking events (not thanking or praising) where candidates will be speaking?

A. Yes

Q. What about posting an article about or a published op-ed piece written by a candidate on the newswire?

A. Under Federal law, yes and no. Short answer: Yes, but be cautious about padding it with language that could be seen as an endorsement. If a rival candidate asks for/insists upon equal time, you could refuse but could be seen as being close to the "line" for supporting one person vs. the other. If you see that person as not being solid, you can include them and add facts about his past record.

Q. What can and cannot be said in letting other members know that a C4L member is running and could use their help?

A. Probably the stickiest of all the situations that we'll find ourselves in. As long as the info is said in an "informational" way, you can do this. Facts only. If, for instance, a member steps down from a coordinator position, you can say he/she stepped down to run for office, thank them for their leadership, and wish them the best in their run for office. Say that we don't support or oppose candidates for office, but if you would like more information, provide link to



website. Might also add a comment from the candidate: "Campaign is going great, fighting for liberty, hoping that funding will increase, etc." But, don't go further than that.

Q. Should we support members running for office who don't deserve it?

A. This is not a legal question, but a C4L policy question. I don't make policy, but give my opinion: You will run into people who, when they enter the ring, cannot raise money and insist on talking about their own issues rather than what interests voters. They may be considered "disaster" campaigns. This calls for discernment. There are "flamethrowers" on the blogs, and if you are attacked on the blogs for not supporting them, frankly, just don't read the blogs or take it personally.

Q. What are the rules when working with other groups that are 501(c) (4)?

A. In terms of the law, there are no rules. Although not stated policy, we encourage you to be cautious about combining openly with any organization, because by combining publicly, anything they do could entangle us. We could be accused of working on something that we didn't intend to work with them on. Strong caution for publicly working together. For working privately together, note of caution: There are a lot of dirty players in politics and they have corrupted the conservative movement; they are good at confusing people, distracting them and getting people to do things that are not in the interest of liberty. May want to stay away from people that "know how it all works".

Don't disregard the above warnings. I DO want to know where like-minded groups are devoting their resources, because generally speaking, the candidate with the most enemies loses. Everyone will have more success if multiple groups are piling on at the same time.

Q. What about groups that are not (C) (4)'s?

A. There are several types. 501C3 (educational organization) – There is nothing to prevent you from working with them, but they are not allowed to do many things you can do. They could accidentally get in trouble. However, you can use their research and facts to give your claims credibility.

If 527, PAC, political party, union – be very cautious. If you have a question, please ask. The more they are involved in elections, the more you are under restrictions by law or policy toward not being directly involved, especially publicly. You can work with them in some instances for information gathering, but there is a danger. Also see info about working with a political party.

Q. What are the rules for working with a 501c4 and a Political Party?

A. In terms of info gathering and sharing information on candidates and campaigns you should work with them, preferably not wearing a C4L t-shirt. However, the more involved you are, you may be subject to being accused of doing coordinated election campaign work (at the federal

level, there is a certain amount of scrutiny and at the state level often much more scrutinized). Never do anything that is public and obvious. You can easily get entangled with problems here, so contact us if you have questions.

Q. Can members use our social networking tools to discuss/advertise campaign events for campaigns they are working on (i.e. petitioning, fundraisers, etc.)? If so, where are the lines? If not, what is the advice on how to effectively engage and recruit like-minded people from our membership base?

A. There isn't anything in the technology that is unique. Guidelines are the same. As an individual, there are no restrictions because these are private networking tools. If you are posting on a formal Campaign for Liberty networking site, the policy and laws apply.

Note: There is no clear line, but if using title or logo in any way, be careful. For those of you with titles or official positions, the more tenuous it becomes. Networking tools are considered a completely open forum. On C4L nationally hosted websites, we'll have to look at this to see if we are opening up, unintentionally, any accusation of electioneering.

Q. Can we host a candidate forum?

A. Yes, but you must provide the same information for all candidates. Doing this on a selective basis is problematic. You can hold debate forums where all candidates have been invited. You can hold one for just one party or all candidates. This playing field is where your questions will be asked, you have the ability to control the audience, and moderate the debate. When the politician takes advantage of the forum to misrepresent past actions, you can plan for how to address this during the forum.

Q. In working with other groups on events, can we put Campaign for Liberty on the flier as "sponsor"?

A. If it is an endorsement of a candidate, no. If it is a fundraiser, fair, or forum where multiple candidates are invited (or a speaker), yes.

Q. Can we make a voter pamphlet/guide?

A. Generally you can as long as you don't use words such as "vote for" or "elect", and the language must be non-partisan. Do not endorse any candidate. Otherwise, this language would be considered 'electioneering'. The clearest guidelines for this is in the Buckley Decision – see [here](#).

Q. Can we post videos of candidate responses to questions on our state page?

A. If there is a full effort to interview all candidates, it should be fine. If questions are related to an election, they must go through headquarters.

Q. If a local Campaign for Liberty group holds regular meetings and asks candidates to speak to the group, should we make sure that we reach out to other people running to give them the same opportunity?

A. It would be prudent to invite other candidates. Most that are hostile to you will not come. Initially, some who don't know who you are may come. Others will attend and try to snow you; in this case, allow them to speak, and then tear them apart.

Q. Can we develop a candidate guide similar to the TRIM Bulletin previously developed by the John Birch Society?

A. It depends. If it is dealing with an incumbent and not sent in the context of a campaign this may be acceptable. If it is obviously a slam piece designed to oppose a candidate then the answer is “no, that’s not acceptable for a 501(c) (4) organization.” Please don’t take this answer to mean you can’t say anything during the election, you can and YOU SHOULD. We do need to remind our members who voted against us while the legislature was in session. This can be done in the context of issue discussion and citizen lobbying.

## Recommended Reading

- Robert’s Rules of Order, Newly Revised
- Robert’s Rules of Order, 10<sup>th</sup> Edition
- Robert’s Rules for Dummies, by C. Alan Jennings
- Rules for Radicals, by Saul Alinsky
- Arms and Influence, by Thomas Shelling
- What Makes You Think We Read the Bills, by (State Senator) H.L. (Bill) Richardson (*Note: Not Confrontation Politics model*)
- Winning Through Intimidation, by Robert Ringer
- Calling All Radicals, by Gabriel Thompson
- The Art of War, by Sun Tzu
- Ogilvy’s Confessions of an Ad Man, by David Ogilvy
- Ogilvy on Advertising, by David Ogilvy
- Words that Sell, by Richard Bayan
- The Law, by Frederic Bastiat
- Dedication and Leadership, by Douglas Hyde
- Leadership Skills: Developing Volunteers for Organizational Success, by Emily Kittle Morrison