

## Americans for Tax Fairness April-November Field Deliverables for Partners (2013)

ATF's central challenge in this phase of work is to keep progressive revenue front stage in fiscal policy debates, especially as lawmakers in Washington DC fight more aggressively than ever for a cuts-only approach. We'll use the federal budget fight, the \$1 trillion in across the board sequestration cuts that took effect March 1<sup>st</sup>, the Continuing Resolution deadline and the ceiling as opportunities to elevate more revenue from the richest 2% and corporations as an important part of the solution to solving the country's economic challenges.

### Our legislative objectives are two-fold:

- To ensure that Senate Democrats support a substantial amount of new revenue (at least \$1 trillion) from the rich and corporations, rather than more cuts to programs, benefits and services in any funding agreement on the budget or to address the nation's debt.
- To insure that any reforms to the corporate tax system will close loopholes that allow companies to offshore profits and jobs and will require corporations to pay their fair share of taxes rather than reduce taxes for corporations overall.

In the states, ATF's tactics for this period will include an aggressive focus on corporations that avoid paying their fair share as a tactic to energize the base, move the middle and create a media narrative to influence the legislative process. The specific strategy in each state to use the corporate tax focus to influence Senators will vary, but in all states partners will use the unified set of tactics below to shift public opinion, to organize the base and build capacity. State partners will coordinate the timing, targeting, message and execution with the national campaign directly or through the network partners.

The field deliverables listed below are required in each state and are designed to develop the needed media, rapid response and legislative capacity that ATF will need act as a campaign during key moments in Congressional fight as well as to increase the long-term capacity of partners to work on these issues. Each state is expected to adapt the tactics below to your states and legislative targets with the help of your regional managers and the ATF campaign staff.

TACTIC	TIMELINE	DELIVERABLE
		<b>STATE PLANS</b>
<b>STRATEGIC PLANNING</b>	BY Monday, APRIL 29 <sup>th</sup>	<p><b>By April 29th</b>, ATF state partners must produce a 2-5 page plan that articulates each state's strategy to move legislative targets between April and November. This plan should be developed in coordination with the state's network manager, the local ATF coalition partners and specifically include how these deliverables are adapted to the state.</p> <p>Each plan should include:</p> <ul style="list-style-type: none"> <li>• An assessment of where each legislative target stands on ATF's legislative demands currently and where you hope to move the target.</li> <li>• A power-analysis that demonstrates an understanding of which tactics move the target, what challenges and opportunities there are in the coming months and how tactics may need to escalate to secure the target's support for ATF's objectives.</li> <li>• A explanation of how the deliverables fit into the legislative strategy and some specific detail about how the tactics laid out below drive your strategy.</li> </ul>

		<ul style="list-style-type: none"> <li>• Some specific attention to how focus on corporate taxes and secondary corporate targets helps accomplish your goals.</li> <li>• An analysis of what capacity your organization needs to develop to execute the plan.</li> </ul> <p>ATF will provide a template for production of this plan that partners can use as a guide and to insure your plan meets criteria the campaign is seeking. The <b>campaign will provide feedback on these plans by Monday, May 13<sup>th</sup></b> and the plans will be further discussed at the ATF National Field Meeting on May 22<sup>nd</sup>-23<sup>rd</sup>.</p>
<b>STATE/NATIONAL COORDINATION</b>		
<b>NATIONAL FIELD MEETING</b>	MAY 22-23	<ul style="list-style-type: none"> <li>• State partners must participate in one national in-person field meeting held in the DC metro area to assess work so far, plan work moving forward and collaborate with national partners who are part of the ATF coalition. The organizer assigned to lead ATF work in the state must attend. State groups and field networks will participate in the planning and execution of this meeting as well as attend the meeting.</li> </ul>
<b>SKILL-BUILDING</b>	APRIL-NOVEMBER	<ul style="list-style-type: none"> <li>• Periodically, state groups will be asked to join and to recruit others to join webinars, trainings, etc. that develop the skills of organizers and leaders to execute work on progressive taxes.</li> </ul>
<b>COORDINATION W/NATIONAL CAMPAIGN</b>	APRIL-NOVEMBER	<ul style="list-style-type: none"> <li>• State ATF Partners must participate on regular conference calls with the national campaign to keep up to date on strategy and program as well as to participate in planning work.</li> <li>• State partners must also participate in periodic state specific calls about legislative strategy, media strategy and other topics. These calls may also involve national ATF partners working in DC on these topics.</li> </ul>
<b>REPORTING</b>	APRIL-NOVEMBER	<ul style="list-style-type: none"> <li>• State partners will be asked to report media events “in real time” so that the campaign can promote activity on line and in national media.</li> <li>• State partners must report their overall progress on these deliverable regularly to the national campaign using a format and on a schedule to be determined by the national campaign with the participation of network partners.</li> <li>• The campaign will make every effort to limit duplicative reporting.</li> </ul>

## LEGISLATIVE OUTREACH

<p style="text-align: center;"><b>LEGISLATIVE RAPID RESPONSE</b></p>	<p style="text-align: center;">APRIL- NOVEMBER</p>	<p>Rapid response is the highest priority activity for state groups and the national campaign. This activity happens “as-needed” based on legislative developments in Congress. Groups will be asked to organize a range of activity (calls, events, media outreach, legislative visits) with 12-48 hours notice to influence legislative targets at key moments. Many of the tactics included in these deliverables are designed to build coalition, retail and media capacity to execute rapid response at key moments.</p>
<p style="text-align: center;"><b>GRASSROOTS LOBBYING</b></p>	<p style="text-align: center;">APRIL- NOVEMBER</p>	<ul style="list-style-type: none"> <li>• Partners will participate in <b>call-in days</b> at particular legislative moments when grassroots calls can influence targets. <b>For each call-in day, ATF will set a numerical benchmark for calls</b>, provide a call-in mechanism to track the calls and ask groups to use a specific message.</li> <li>• During <b>Congressional recess periods</b>, state partners will turn out constituents to town hall meetings and other events sponsored by targeted Senators to both generate visibility for the tax fairness issue as well as to ask questions and urge lawmakers to support our point of view.</li> <li>• In addition, between <b>June-November</b>, groups should generate a minimum of <b>100 contacts a month</b> via petitions, postcards, calls, hand-written letters, etc. specifically asking for support on our legislative agenda. Groups should be prepared to provide copies of these grassroots contacts to the campaign as part of reporting.</li> </ul>
<p style="text-align: center;"><b>DIRECT LOBBYING</b></p>	<p style="text-align: center;">APRIL- NOVEMBER</p>	<p>ATF partners should be in very regular monthly contact with their targeted members’ office since a key piece of our work is to develop relationships with the Members and influence their opinions on our issues.</p> <ul style="list-style-type: none"> <li>• ATF lead groups (along with their coalition partners) should organize a <b>minimum of one monthly conversation</b> (through either meetings or conference calls) with the Senate office.</li> <li>• <b>In addition</b>, groups should organize a <b>minimum of four constituency visits</b> to the Senate offices. These constituency visits should be from clergy leaders, small biz people, advocates, labor and/or any constituency groups that have particular influence with the Senator. These constituency leaders do not need to identify themselves as ATF partners or allies, but must try to move the target on our legislative priorities.</li> <li>• ATF groups will periodically be asked to <b>recruit influential organizational leaders for state sign-on letters</b> with ATF’s specific demands on corporate taxes to the Senator(s) in your state. These should be organizational leaders who have influence with the Senator. <b>Between April-November</b>, each group will complete two sign-on letters: a group sign-on letter signed by 10-15 signers and an individual organizational letter signed and sent to target by 5-6 separate organizations. The campaign will provide templates for these.</li> </ul>

CAPACITY & BUILDING THE BASE		
<b>COALITION BUILDING</b>	APRIL-NOVEMBER	<ul style="list-style-type: none"> <li>• Each ATF lead partner should convene meetings with local ATF coalition partners <b>at least monthly</b> to plan activity and execute activity.</li> <li>• <b>Each month</b>, each state ATF lead group should recruit a minimum of <b>one new endorser</b> for the state campaign. These new endorsers must be provided to the national campaign monthly.</li> <li>• In addition, <b>over the course of this period, state groups should recruit a minimum of 3-5 coalition partners</b> who bring capacity to the campaign to help move the legislative target. The coalition groups you select should be based on your analysis of which organizations move the targets.</li> </ul>
<b>PUBLIC EDUCATION</b>	APRIL-NOVEMBER	<ul style="list-style-type: none"> <li>• <b>Minimum of 1 presentation or training a month to local groups</b> (including neighborhood associations, democratic township clubs, civic organizations, advocacy organizations, fraternal organizations, veterans groups, local unions, house parties, etc.) about progressive revenue, corporate taxes and the federal budget context during this period. These events can include trainings, forums, town halls, etc. These are not media activities.</li> </ul>
<b>NATIONAL MOBILIZATIONS</b>	APRIL	<ul style="list-style-type: none"> <li>• Each partner will organize <b>one event between April 8-April 15<sup>th</sup></b> focusing on corporate taxes and using tax day as a hook.</li> <li>• Groups will <b>submit plans by April 3<sup>rd</sup></b> describing their event and the activity leading up to it in early April.</li> </ul>
	MAY-NOVEMBER	<p>Over the course of these months, ATF will be asked to participate in 3-4 other nationally coordinated activities <b>to be determined</b>. These activities will include unifying factors (like message and visuals) and timing but allow for flexibility in terms of corporate targets and tactics. <b>At least one of these mobilizations will focus on events with Senators.</b></p> <p>Nationally coordinated actions are likely to be timed around:</p> <ul style="list-style-type: none"> <li>• Holidays (like 4<sup>th</sup> of July or Labor Day)</li> <li>• Key Legislative Moments (like expiration of the debt ceiling in May)</li> <li>• Congressional Recess Periods</li> </ul>

<p><b>EARNED MEDIA ACTIVITY</b></p>	<p>APRIL-NOVEMBER</p>	<ul style="list-style-type: none"> <li>• <b>OP-EDS:</b> Place a <b>minimum of one op-ed every other month</b> that elevate ATF’s tax fairness message. These op-eds must be signed by strategic messengers who influence the Senate targets and comply with ATF messaging. ATF will provide writing and placement support for these op-eds. <b>Each partner will generate 4 op-eds between April and November.</b></li> <li>• <b>LTEs:</b> Place a <b>minimum of 1 LTE a month</b> in local papers. You must provide the link to the LTE and the piece must feature ATF’s message to meet the deliverable. ATF will provide templates for these LTEs.</li> <li>• <b>REPORT RELEASES:</b> State groups will be asked periodically to promote new data and information about corporate taxes to help create a narrative that promotes fair taxes for corporations in the state and nationally.</li> <li>• <b>EVENTS:</b> Each state group will be asked to do a <b>minimum of one earned media event a month</b> to elevate our message. Groups can decide what kind of event works best for their state from the list below or can choose their own earned media tactic: <ul style="list-style-type: none"> <li>-report release events,</li> <li>-actions/press conferences at corporate target locations,</li> <li>-passage of local resolutions in municipalities/towns/villages,</li> <li>-press conferences in state capitols,</li> <li>-protests at Fix the Debt events, fundraisers with corporate CEOs or shareholder meetings</li> <li>-telepressers or events with Members of Congress</li> <li>-holiday-themed events.</li> </ul> </li> </ul> <p>Your events should be designed to attract media, should feature credible spokespeople to promote our message, and should include messengers who matter to the legislative target.</p> <p>At moments when there are national mobilization efforts, those events will count toward this deliverable.</p>
<p><b>SOCIAL MEDIA</b></p>	<p>MARCH-NOVEMBER</p>	<ul style="list-style-type: none"> <li>• Monthly Facebook, Twitter and other postings using ATF message and content.</li> <li>• Minimum of one blog-post featuring ATF’s message per month.</li> </ul>