

Template for Building a City Green New Deal: The Portland Clean Energy Fund

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*This work is dedicated to those on the frontlines of the climate crisis
and the struggle for climate justice.*

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Prologue

This report is based on 30 interviews I conducted with the people who played central roles in the *Portland Clean Energy Fund* (PCEF) initiative and campaign between 2015-2018, my review of hundreds of pages of archival documents, as well as my own recollections and reflections as someone deeply involved in PCEF throughout this period. Additionally, I conducted a scoping meeting with activists in several cities across the nation interested in replicating the PCEF model to explore which of our coalition's experiences would be most helpful to such efforts and incorporated their questions into the interviews that form the basis of this report. The report that follows is a template for climate activists. My hope is that it will be used, tested and reformed countless times in the future as new lessons are learned and new challenges appear and are overcome.

Addendum (July 2020): It is important to note that much has happened and continues to rapidly unfold since the writing of this document. In particular a [global pandemic stemming from our exploitation of animals](#) and the explosive surge of the [Movement for Black Lives](#) in the wake of George Floyd's murder by the police have awakened awareness of our interconnectedness with each other and are leading to seismic shifts in our society and world. In the context of the story of the *Portland Clean Energy Fund*, these profound shifts offer both new challenges (such as a looming recession triggered by the pandemic that is causing substantial city- and state-level budget shortfalls and heightened threats to our democracy) as well as immense opportunity if we can learn from this and dismantle the interconnected underlying systems of oppression and exploitation that are at the root of the climate crisis, the pandemic and racial and economic injustice and transform ourselves, our communities, society and world.

Adriana Voss-Andreae

Steering Committee Organizations

[350PDX](#)

350PDX's mission is building a diverse grassroots movement to address the causes of climate disruption through justice-based solutions by inspiring, training and mobilizing people to act. 350PDX's goals include advancing the climate justice movement in alliance with frontline communities and replacing the extractive economy with a regenerative one that is healthy and just for all.

[APANO \(Asian Pacific Network of Oregon\)](#)

APANO is a statewide, grassroots organization, uniting Asians and Pacific Islanders to achieve social justice. We use our collective strengths to advance equity through empowering, organizing and advocating with our communities.

[CCC \(Coalition of Communities of Color\)](#)

CCC is an alliance of culturally specific community-based organizations with representation from the following communities of color: African, African American, Asian, Latino, Middle Eastern and North African, Native American, Pacific Islander, and Slavic. The CCC supports a collective racial justice effort to improve outcomes for communities of color through policy analysis and advocacy, culturally appropriate data and research, and leadership development in communities of color.

[Columbia Riverkeeper](#)

Columbia Riverkeeper works to empower local communities, enforce environmental laws, and build strategic coalitions around its mission to protect and restore the water quality of the Columbia River and all life connected to it.

[NAACP Portland Branch 1120 \(National Association for the Advancement of Colored People\)](#)

The NAACP's mission is to ensure the political, educational, social, and economic equality of rights of all persons and to eliminate race-based discrimination.

[NAYA \(Native American Youth and Family Center\)](#)

NAYA is a family of numerous tribes and voices who are rooted in sustaining tradition and building cultural wealth. NAYA provides culturally specific programs and services that guide their people in the direction of personal success and balance through cultural empowerment.

[OPAL Environmental Justice \(Organizing People/Activating Leaders\)](#)

Founded by and for people of color and low income, OPAL is a grassroots-driven hub at the center of Oregon's movement for Environmental Justice whose mission is to build power for Environmental Justice and Civil Rights in their community.

[OPSR \(Oregon Physicians for Social Responsibility\)](#)

OPSR is an organization of health professionals and public health advocates working collaboratively with community partners to educate and advocate for societal change and policy change at every level of government; OPSR strives to end the nuclear threat, advance environmental health, protect our climate, and promote peace.

Oregon Chapter of the Sierra Club

The Oregon Chapter of the Sierra Club represents the organization's 80,000 members and supporters in Oregon and works to build an unstoppable environmental movement and protect Oregon's public lands, stop fossil fuel pipelines and export terminals, and fight for affordable clean energy solutions.

Portland Audubon

Portland Audubon's mission is to inspire all people to love and protect birds, wildlife, and the natural environment upon which life depends. In addition to their educational programming and wildlife rehabilitation, Portland Audubon works to protect imperiled species, reduce threats to birds across the Oregon landscape, preserve habitat, fight climate change, and advocate for equitable access to nature for all Portland-Metro Area residents.

Verde

Verde serves communities by building environmental wealth through Social Enterprise, Outreach and Advocacy. Verde has brought new environmental investments to Portland's neighborhoods, involved community members in planning and building of these investments, and ensured that low-income people and people of color directly benefited from the investments.

Voices Featured

The remarkable people whose voices I weaved together to synthesize the narrative of the PCEF story are listed below in alphabetical order (by first name) with their key roles in the PCEF campaign and their organizational affiliation during the campaign. The people involved in the PCEF campaign, and their respective organizations, did so much more than is listed here as their key roles, and each of them leveraged their organizational connections, networks and resources to the fullest extent. Their brief biographies, including how their personal stories tie into the PCEF work, are linked and can be found in [Appendix A](#).



[Adriana Voss-Andreae, Report Author, Co-Chief Petitioner, Executive Committee \(350PDX\)](#)

Adriana’s key roles in the PCEF campaign include: formation of core coalition, coalition building, early fundraising, strategic planning, co-chief petitioner, signature gathering lead organizer, volunteer team, fundraising team, media events & actions co-lead. She also served on the implementation team and authored this report.

[Alan Hipólito, Campaign Manager, Executive Committee \(Verde\)](#)

Alan’s key roles in the PCEF campaign include: formation of core coalition, policymaking, coalition building, campaign manager and fundraising lead. He continued to play a lead role on the PCEF coalition’s implementation team.



Alison Wiley, Volunteer Team (*EcoFaith Recovery*)

Alison’s key roles in the PCEF campaign include: coalition building with faith communities, overseeing the campaign’s signature validation and data entry operation and canvassing.



Antjuan Tolbert, Steering Committee (*Portland NAACP*)

Antjuan’s role in the campaign includes serving on the steering committee and communications support.



Brent Foster, Environmental Attorney & Campaign Strategist

Brent worked with Jo Ann Hardesty to help craft the initial PCEF concept; his roles include: formation of core coalition, drafting the policy language together with the coalition’s BIPOC leadership, coordinating with outside legal counsel on legal review and edits to the measure, overseeing the paid signature gathering operation and serving as a guide on campaign strategy and planning.



Cary Watters, Steering Committee (NAYA), Campaign Communications Staff

Cary's roles in the PCEF campaign include: formation of core coalition, early fundraising and, as communications staff, preparing content for Letters to the Editor, Op-Eds, press releases and talking points as well as coordination of photography.



Damon Motz-Storey, Executive Committee (Oregon PSR), Campaign Communications Co-lead

Damon's role in the PCEF campaign was co-lead of communications, which includes: messaging, developing content for campaign materials, campaign branding, email blast templates and website, social media development, managing press, coordinating and training of spokespersons and coordinating the communications team. He also coordinated health professional advocacy. He continues to lead communications for the PCEF coalition's implementation team.



Rev. E.D. Mondaine, Co-Chief Petitioner, Steering Committee (Portland NAACP Branch)

E.D.'s key roles in the PCEF campaign include: Co-chief petitioner and spokesperson.



**Gregory Monahan, Volunteer Team
(Oregon Sierra Club)**

Gregory's roles in the PCEF campaign include: setting up systems for signature gathering, Organizing *Oregon Sierra Club* volunteers for signature gathering/field work.



**Jenny Lee, Executive Committee (CCC),
Communications Director**

Jenny's key roles in the PCEF campaign were as a spokesperson and Communications Director, which included: developing strategic communications, overseeing all campaign communications, messaging, managing social media content and online advertisement, representing the PCEF coalition in public forums, live debates and press interviews. She continues to serve on the PCEF coalition's implementation team.



Jessica Beckett, Campaign Field Director

Jessica's role in the PCEF campaign was as Campaign Field Director in the critical final two months of the campaign, which includes: creating and implementing the voter outreach plan, choosing and adjusting targets for our volunteer resources, setting up the systems for canvassing and phonebanks, hiring and managing field staff, managing and running the canvassing operation and coordinating with the steering committee to organize canvassing events.



**Jo Ann Hardesty, Steering Committee
(Portland Branch NAACP)**

Her roles in the PCEF include: policymaking, leading the early core coalition, coalition building, developing messaging and early outreach materials, early campaign planning and political strategy. As a Portland City Commissioner, Jo Ann now sees her role as “protecting the integrity of the vision that the community came up with. It’s clear that this has to be a community-led effort, but the City is responsible for ensuring it goes to benefit the people it is supposed to.”

Jon Jensen, PCEF endorser (IBEW Local 48)

Jon represented the Building Trades in their discussions with the PCEF coalition



**Khanh Pham, Executive Committee
(APANO)**

Khanh’s key roles in the campaign include: formation of core coalition, campaign strategic planning, policymaking, spokesperson and media events & actions co-lead. She continues to play a lead role on the PCEF coalition’s implementation team.



Laura Stevens, Volunteer Team

Laura's key roles in the campaign include: Field volunteer organizer, mentorship of volunteer leaders.



Lenny Dee, PCEF Executive Committee (350PDX)

Lenny's roles in the PCEF include: formation of core coalition, coalition building/partnership engagement lead, policy research, signature gathering lead organizer and political strategy. He continues to play a lead role on the PCEF coalition's implementation team.



Maggie Tallmadge, Steering Committee (Coalition of Communities of Color)

Maggie's roles in the PCEF include: early formation of core coalition, policymaking and early strategic and campaign planning.

Mark McCleod, Volunteer Team
(350PDX & Oregon Sierra Club)

Mark's key roles in the campaign include: volunteer leader and top canvasser.

Martha Balshem, Volunteer Team Leader
(Portland Branch NAACP)

Martha's role in the PCEF includes overseeing the campaign's petition data entry team.



Micah Meskel, Steering Committee
(Portland Audubon)

Micah's key roles in the campaign include: volunteer organizer, volunteer team, signature gathering lead events coordinator, lawn sign canvassing lead organizer.



Paige Richardson, Consultant

Paige's role in the PCEF campaign was as guide and mentor on nearly every aspect of the campaign including: guide to campaign manager and executive committee, advisor on campaign strategy and planning, setting up of *Political Action Committee* and compliance, guiding signature gathering validation process, coalition building with political establishment, polling, messaging, and hiring of campaign staff.



Simone Crowe, Campaign Field Staff Organizer

Simone's key role in the PCEF campaign was as a lead Field Organizer who built our field operation during the early canvassing efforts.



Tony DeFalco, Steering Committee (Verde)

Tony's key roles in the campaign include: coalition building, lead fundraiser and spokesperson.



Trevor Kaul, Steering Committee (Oregon Chapter of the Sierra Club)

Trevor's key roles in the campaign include: securing resources (office space, in-kind staff etc.) and fundraising.



Willy Myers, PCEF endorser (Executive Secretary-Treasurer for *Columbia Pacific Building Trades*)

Willy represented the Building Trades in discussions with the PCEF coalition.

Introduction

“As we transition off of fossil fuels as rapidly as the climate crisis demands, we have a once-in-a-century opportunity to build a fairer, more equitable and more inclusive society. The Portland Clean Energy Fund is a visionary and practical plan to accomplish that goal. If your city sets this precedent, I have absolutely no doubt that it will become a model not just for cities across the United States, but around the world.” -Naomi Klein, renowned author and climate movement leader

The City of Portland, Oregon, recently passed The *Portland Clean Energy Fund* (PCEF), the nation’s first successful climate justice ballot initiative created and led by Black, Indigenous and People of Color communities (BIPOC). It shows that a *Green New Deal* (GND) is within reach – when we start at the city level. PCEF leadership and policymaking came from Black, Indigenous, Latinx¹ and Asian-Pacific Islander communities and was supported by grassroots environmental groups and a large intersectional coalition. It successfully passed despite facing an opposition backed by some of the nation’s largest corporations.

The Nation magazine has called PCEF [“an idea whose time has come](#): a tax on the richest retail corporations to pay for clean energy that will benefit everyone.” The measure holds corporations accountable for their climate impacts by making them pay for the transition to renewable energy and energy efficiency, the creation of green careers and business opportunities, green infrastructure, regenerative urban agriculture projects and other innovative solutions that prioritize underserved populations and neighborhoods that have faced a long legacy of disinvestment and exclusion. PCEF provides upwards of \$50 million annually, in perpetuity, to fund this transition.

This report details the anatomy of the campaign, and strategy that achieved this groundbreaking win. It exposes some of the unsavory corporate opposition tactics used both pre- and post-election and provides critical insights for advocates and municipalities seeking to follow Portland’s climate justice model.

¹ Latinx is defined as of, relating to, or marked by Latin American heritage —used as a gender-neutral alternative to *Latino* or *Latina*.

Background

Why Action at the City Level Matters

Of the 300 U.S. cities with populations above 100K, Portland, with its population of 650K, is the 25th largest. Over half of the global population currently live in cities/urban areas, which [consume over three-quarters of the world's energy and account for over 60% of global greenhouse gas emissions](#). The U.N. predicts that close to 70% of the population will live in cities by 2050, giving cities an essential role in mitigating the climate crisis. In the U.S., cities are likely to play a central role in counteracting federal administration efforts to roll back climate change rules and regulations, often insufficient to begin with. As stated in an article titled '[All Resistance is Local](#)' in *The Nation* (2016) "It's clear the federal government and most states will not be forces for progressive action, let alone regeneration. This dark reality has prompted many to argue that cities will become the most promising arenas for addressing social inequality, cultural diversity, climate change, and political alienation." Indeed most, major progressive legislation at the federal level has its [roots at the local level](#), where policies are won through grassroots organizing and local movement building. In this sense cities and other local governments can be viewed as the laboratories of our democracy.

The Inequality Crisis & its Racist Roots in Portland

Our current economic model has led to two closely related crises: the climate crisis and the inequality crisis. Inequality in the U.S. has reached record levels, with the top 1% owning more wealth than the bottom 90%. This extreme inequality is also felt in the state of Oregon and in Portland, exacerbated by Oregon's long history of white supremacy and the resulting discriminatory policies and practices that predate its founding as a state in 1859. So despite its reputation and, by certain measures, credentials² as a progressive city, Portland has been called the '[capital of white supremacy](#)' and remains one of the [whitest cities in the country](#).

Early black exclusion laws in the mid-nineteenth century worked to prevent Blacks from settling in the state. Oregon's refusal to ratify the 14th and 15th Amendments of the U.S. constitution until the mid-20th was later replaced with other racist policies that systematically led to the disinvestment in and decimation of historically Black neighborhoods in Portland. These laws have intentionally and disproportionately impacted Black, Indigenous and People of Color communities (BIPOC) in virtually every aspect of their lives, from housing and education to health and economic opportunity. In the 2000s Portland's rapid redevelopment, with its accompanying skyrocketing housing costs, only accelerated the displacement of BIPOC and gave it the notoriety of becoming one of the country's most rapidly gentrifying cities. From 2000-2013, White incomes rose from ~\$55K to \$60K while Black incomes fell further from ~\$35K to less than \$30K so that the average Black Portland resident could not afford a 2-bedroom apartment in any of the city's neighborhoods. By 2015, the number of Black homeless people in Portland grew by nearly 50%, now disproportionately making up about a quarter of the City's total homeless population despite Black people constituting only ~7% of Portland's overall population. The inequality crisis has in turn resulted in Blacks and other [BIPOC being](#)

² By certain measures Portland is considered the [12th most progressive](#) out of 50 of the largest U.S. cities.

[among the most vulnerable to the rising urban impacts](#) of the climate crisis such as urban heat islands.³

Why Tell the PCEF Story: A Template for Climate Justice

There is never a good time for a "crisis". As we survey the new landscape that is the Anthropocene, how much more obvious does this truism appear when confronted with the existential crisis of climate extinction. We find ourselves taking the stumbling, humbling, indecisive first steps towards generating a new political, social, economic understanding of the unprecedented challenges of the moment. The recent outline of a "*Green New Deal*" (*GND*), associated with a new wave of young congressional Democrats, has focused progressive hopes for an alternative social organization able to address the accumulating forces of species extinction and to begin building the resilience of communities through a reformed economics based on valuing life over profit.

The challenges of a *GND* appear impossibly huge, as Bernie Sanders has remarked, "requiring nothing short of a social revolution." Where is the social momentum for this social revolution to be built and how? While federal and international policies and programs are essential in this planetary struggle, the necessary reconfiguration of our social relations will be embodied in the newly imagined life of our communities.



The following report takes a look back at the 2018 groundbreaking Portland Oregon campaign for climate justice. The difficulties and successes of forging an effective community coalition of lasting resilience are chronicled and detailed for a campaign which ultimately proved victorious and celebrated the nation's first successful climate justice ballot initiative.

Current progressive strategies often resort to insistence on building "community". But subjected to the constant indoctrination of the "individual" as our lone identity, the very idea of "community" has come to feel hopelessly nostalgic, summoning up images of some time and place nowhere present today. The awful truth is that held within the "strait jacket" of neoliberal individuality⁴, community itself must be re-imagined and reconstructed. This was the task the Portland initiative faced.

³ Addendum (July, 2020): it is also important to note here that Portland's history, including its history of police brutality, have made [Portland one of the nation's ground zeroes](#) for the clash between "Law and Order" politics and the *Movement for Black Lives*.

⁴ America, among the developed nations, is arguably exceptional in finding itself unprepared for the changes and sacrifices that will be required to slow the threat to planetary life. A history forged from

The campaign for the *Portland Clean Energy Fund* (PCEF) offers to activists insightful and critical lessons in this difficult, exciting and groundbreaking work of building trust between mainstream environmentalists, whose supporters tend to be overwhelmingly white, and BIPOC, who have long been the targets of and fighting in the trenches against [environmental injustice](#) and are targeted at the front-line of looming climate devastation. *Among the further critical lessons documented is the necessity of recognizing BIPOC as the natural leadership in the struggle for climate justice, requiring a transformational reset of the habitual perspective of many environmental groups comfortable with the expectation of "white" leadership.*

With the documented history of the Portland initiative to make the 1% pay 1%, we witness the tentative beginnings of the new community that must be formed to supply the motivation and endurance necessary for the long path ahead to the possibility of planetary health. Initial suspicions and distrust gave way to an enduring solidarity as a coalition led by BIPOC and grassroots environmental groups snowballed with buy-in of labor unions and the liberal establishment.

We are only beginning this unprecedented, still barely glimpsed challenge of addressing the climate emergency with the type of massive-scale mobilization that is required, but it is incumbent on progressives to provide a compelling new vision of sustainability in the face of the enormous momentum towards extinction.

genocide, racism and waves of immigrants has been continually repressed by constructing a national myth of an ever-glorious future of continued growth and inclusive opportunity. The mantra for any temporary ailments suffered as a country being always "onward towards greater growth": a "growth" synonymous with the exploitation of our natural home, which today the dynamics of climate change finally reveal as "unsustainable". It is a logic of extinction; i.e. no future at all.

In addition to the unresolved historical divisions in our country, these enduring fractures have been subjected to the further stresses of the prevailing capitalist regime of "neoliberalism". With cyclonic effect, the neoliberal project (which formed at the end of the 1970's as the capitalist counter-attack to falling profits) has cut a devastating path of destruction, resulting in the shredding and dismantling of existing social safety nets and community structures. In its wake took shape the fabrication of the "neoliberal individual", praised for self-centeredness, encouraged to interpret life as a profit-making proposition and even one's own body as human capital to be invested in, while holding in suspicion or contempt all claims to social obligations. Margaret Thatcher's bold denial, "there is no 'society' only individuals" concisely epitomizes the neoliberal spirit and our dominant ideology.

Chapter 1: The Early Pre-Campaign Phase

Story of How the PCEF Coalition Came to Be

In early 2015, Brent Foster, a former environmental attorney and experienced campaigner and Jo Ann Hardesty, then president of the *Portland NAACP 1120 Branch*, first met with Lenny Dee, co-founder and then-Board Director of *350PDX* and I (Adriana Voss-Andreae), co-founder and then-Executive Director of *350PDX*, to discuss the concept that launched a policymaking process which would ultimately become PCEF. We also discussed whether *350PDX* would be suitable and willing to serve as an anchor organization from which to begin breathing life into the policy concept. In describing why *350PDX*, a very young grassroots organization founded in 2013 as a local affiliate of the global climate organization *350.org*, was initially discussed, Brent explains “Other groups said this [initial concept] wasn’t possible” and because *350PDX* was “*willing to take the bull by the horns- and believed that you could take on the big corporations and win...*” you [Adriana], Lenny and Jo Ann were the anchors at the beginning...”

I was particularly excited because, first and foremost, I saw it as a unique opportunity to build and deepen our relationships with frontline communities⁵ and BIPOC, something we had begun doing, but had not yet devoted extensive organizational resources towards despite it being central to *350PDX*’s climate justice mission, goals and values. Secondly, our organization and local movement had been focused almost entirely on ‘No’ campaigns fighting off a seemingly never-ending cascade of dangerous fossil fuel infrastructure projects that were part of the larger engine of our extractive economy and that culminated in, among other things, the successful passage of the [nation’s first City ordinance](#) restricting the development and expansion of bulk fossil fuel terminals. *The prospect of working on a ‘Yes’ campaign -putting forward an alternate positive vision and path, rooted in justice and equity- was incredibly compelling.* We believed, if done right, it would also help excite and build our grassroots volunteer base and political campaign skills. For all these reasons, we felt it worth the effort regardless of whether or not we would succeed in winning a campaign.

Lenny and I faced a great deal of skepticism from the majority of *350PDX* Board members, who saw this type of campaign as being far too big and bold for us to take on as a barely 2-year old organization. “*It will swallow us whole*” was the expression one exasperated board member used to describe what they thought would happen if our young and politically inexperienced organization faced off with some of the largest corporations in the world.

It would take over a year to turn the board around, but the following month we managed to persuade *350PDX*’s Board to “support a poll [...] to assess the viability of a ballot initiative around the Portland/Multnomah County business license fee” as a first step toward further consideration. Due to limited resources, we arranged for a more limited initial robo-call poll in August of 2015 through *Patinkin Research Strategies*. The poll contacted 400 registered ‘likely’

⁵ Frontline communities are those that experience “first and worst” the consequences of the climate crisis as well as the necessary rapid transition off of fossil fuels. These include BIPOC and low-income communities, whose neighborhoods often lack basic infrastructure to support them and who will be increasingly vulnerable as climate stability deteriorates.

voters on landlines only (which generally skews polls more conservatively) and tested the concept of a funding mechanism to support renewable energy and greenhouse gas reduction efforts. There was little to no explicit equity language in this *initial poll*. *The results gave us a rough sketch of viability, indicating a strong level of voter support* for the original concept.⁶

Unsurprisingly, the most likely supporters were young, female, Democrat, and the most likely to oppose were older, Republican, male. Among the key persuadable target voters were those living in outer east Portland, a part of the city known for its ethnic and racial diversity, large immigrant population and lower-income households. In addition, and equally unsurprising, the top polling messaging was that billion-dollar corporations are not paying their fair share.

Shortly after receiving the initial poll results, we organized a meeting to gauge Jo Ann's interest in a potential partnership with the *Portland NAACP*. Both Brent and I had known Jo Ann for years, which helped us have a certain degree of mutual trust from the start. In reminiscing as to why he thought it important to involve Jo Ann at this early stage, Brent expressed: "You learn who the true progressives are, and Jo Ann truly is. Jo Ann and I go back 15 years...She understood the [policy concept] and wasn't afraid of the politics."

"Don't partner with someone who is scared about the politics. If they don't think you can win (even though they know it will be hard), you don't want them as an ally." -Brent Foster

At our initial meetings, Brent, Jo Ann, Lenny and I discussed the concept as the creation of a fund through a 1% retail surcharge (which Brent had then estimated would generate \$50-100 million) to fund solar and energy efficiency projects. Based on these initial discussions, we proposed integrating social and racial equity goals into the measure and Jo Ann agreed to take on a lead role. As Jo Ann recalls, "[Our initial meeting] happened to closely coincide with national *NAACP's* two-day training around climate and environmental justice leadership which I participated in, so *when I first heard about the concept from you [Adriana] and the most brilliant lawyer that I know- and knowing that frontline communities were first and worst impacted- I wanted to see what we could do together.*"

⁶ 68% of contacted voters expressed support including 43% strongly supporting, with only 16% opposing -including 10% strongly opposing- and 7% undecided; with a margin of error of +/- 4.9% at the 95% level of confidence. The poll surveyed age, gender, level of education and political party affiliation, but did not look at race or ethnicity. It is important to note that campaign professionals generally advise that one's measure/concept poll at a minimum of 60% support with likely voters to be considered viable. This is based on the likely assumption that an opposition campaign will spend large sums of money to whittle support, particularly in the final months or weeks before the election.

In December of 2015 Jo Ann organized a meeting with Brent, Van Jones⁷ and Jeremy Hays⁸ in order to introduce them to the policy concept. There were some mutual feelings that it was high time to move beyond having largely white well-resourced environmental groups control the environmental agenda and this presented an opportunity to do just that. “When Van Jones came and he loved the idea even though it wasn’t fleshed out yet, we knew that tinkering around the edges wasn’t enough and that we needed to take bold action,” remembers Jo Ann.

The very first version of the policy, renamed the “Equitable Energy Transition & Climate Change Measure,” was confidentially shared and discussed with just a small group of people that included Jo Ann, James Posey (*Portland NAACP*), Lenny and me (*350PDX*) as well as Marshall Runkel⁹, Derek Smith¹⁰, a representative of the *Organic Consumers Association*¹¹, and a representative of a local Unitarian congregation group known for their engagement in the climate movement and social justice activism. This first version already included energy efficiency projects, job training for people in communities of color, carbon reduction/sequestration through local food production and agricultural practices and a fund commission to oversee the fund. Exemptions for food groceries, medicine, manufacturers and utilities were also incorporated.

In early 2016 this same initial group of people also discussed how to best expand our core coalition and consult with key groups. The first list of ~40 potential core coalition partners included organizations such as:

- *Asian Pacific American Network of Oregon (APANO)*,
- *Verde*
- *the Native American Youth and Family Center (NAYA)*
- *the Coalition for Communities of Color (CCC)*
- *Urban League of Portland*
- *Portland Audubon*
- *Oregon Chapter of the Sierra Club*
- *Oregon Tradeswomen*
- *National Association of Minority Contractors (NAMC)*

The initial list also included labor unions and relatively affluent and politically well-connected ‘mainstream’ environmental groups, although we did not do much outreach in the first year as we were more focused on building trust internally. We did, however, begin our outreach to a few groups on this list based on the respective relationships we held. This resulted in numerous informative conversations early on with *NAMC*, *Oregon Tradeswomen*, *NAACP’s* economic development arm and others that informed policy language, such as promoting the inclusion of

⁷ Van Jones is a renowned news commentator on *CNN* and other mainstream media, as well as an author and co-founder of *Green for All* and other successful national social justice non-profit organizations.

⁸ Jeremy Hays is chief strategist for state and local initiatives at *Green for All*.

⁹ Marshall Runkel is an energy efficiency policy expert who Brent had worked together with on energy efficiency and sustainable technology and who later would end up joining a successful campaign for City Commissioner Chloe Eudaly and become her chief of staff

¹⁰ Derek Smith was former head of *Clean Energy Works Oregon (CEWO)*, now *Enhabit*, an existing DOE-funded program aimed at energy efficiency and job creation

¹¹ OCA was recruited by Brent into the measure discussion for their interest in the food justice policy piece and as potential future campaign supporters

minority contractors and incorporating workforce diversity goals. A civil rights lawyer was also consulted about the contracting requirements for *Metro* and the *City/Portland Development Commission*.

The Evolution of a New Type of Coalition

Shortly after we began our initial outreach effort, Jeremy Hays strongly suggested to immediately meet with and bring in *Verde*, the *Coalition for Communities of Color (CCC)*, *Asian Pacific Network of Oregon (APANO)* and the *Native American Youth and Family Center (NAYA)*, who would all become key coalition partners. Jeremy introduced Jo Ann¹², Lenny and me to Alan Hipólito of *Verde*, Khanh Pham of *APANO*, Cary Watters of *NAYA* and Maggie Tallmadge of *CCC*, writing “I think that it is imperative that the group working on this ballot initiative connect with and coordinate with those of you working on climate justice/climate resilience efforts in low-income communities and communities of color...” Jeremy also indicated that *Green For All* would likely endorse the initiative if local organizations that share their values were supporting it, and suggested that these groups be able to vet and help shape the policy well before it was finalized.

Although there was some concern raised that trying to achieve a group consensus with a broader group at this point might slow the process down, there was fervent agreement among most in our initial small group that bringing in these four additional groups/individuals would help ensure that the policy language was rooted in justice and equity and that it was an important step if we were serious about building an extraordinary diverse coalition from the start. I saw this as an opportunity to expand and deepen our relationships with groups representing frontline communities/BIPOC: something that I felt was central in *350PDX*'s decision on whether or not we would be willing to invest our very limited resources on the initiative and all that that would entail. We invited Alan, Khanh, Cary and Maggie to introduce them to the initiative and work together on the policy language.

¹² Jo Ann already had long-existing relationships with these BIPOC groups.



Throughout this time, we all felt it was incredibly important to maintain a high degree of confidentiality to prevent the draft from leaking to the media and alerting opposition so early in the process, as that could very well quickly quash our chances. It was also a sensitive matter because none of us had even shared the initial policy draft with our respective organizational leadership yet, much less received the go ahead to launch a major campaign around it. Given the perceived urgency, the pace of communication was accelerating, and Brent began speaking of seeking out a potential campaign manager, though some of us felt far from ready to launch and we had no resources to support hiring someone with the kind of experience needed. Brent’s top suggestions included Paige Richardson, one of the nation’s most experienced campaign directors who recently ran a statewide ballot campaign in Oregon, and who would later become our key campaign guide.

At that time, in early 2016, *NAYA*, *Verde*, *APANO*, *CCC*, *OPAL* and other BIPOC organizations had recently formed a *Climate Justice Collaborative* that was supported by funding through a prominent national foundation’s *Climate Resilience & Urban Opportunity Initiative* to build cross-cultural climate action capacity. “We all came together and started to build a framework for a campaign that looks at the interconnectedness of all things and ways in which we could make the most meaningful movement together through a campaign. Our collaboration focused on urban opportunities for climate justice: transportation, green infrastructure, climate resilience and anti-displacement. We were one of fifteen grantees from across the country and received [funding] for a few years,”¹³ recalls Cary, noting the importance of the timing and how “this coincided with visits from Jeremy Hays and Van Jones. Jeremy emailed us that *NAACP* and *350PDX* had a great concept and thought we would be great partners. A number of us then [...] met up with you [Adriana], Jo Ann and Lenny.”

When asked to remember their thoughts and feelings when they first heard about the initiative concept, BIPOC leaders expressed a mixture of strong curiosity and cautious excitement. “I was a mix of interested and concerned: Was it a fully formed and baked idea that people were running with?” recalls Alan, “The response was ‘we’re just getting started and want to talk to organizations like *Verde*.’” Khanh remembers that she “first heard about it through an invitation from Jo Ann. I was really interested in the concept from the beginning. I’m interested in the ideas of wealth redistribution and green energy, of systemic and structural ways we can fund a

¹³ Khanh points out how this funding was key, because it provided stability to these climate justice positions for four years and allowed the people at these organizations to build long term relationships, trust and expertise.

just energy transition” adding that “at first I was just learning and getting to know who you were.”

To Maggie, “It was an exciting concept that was creative, innovative, new - it didn’t have the controversy of state-level carbon pricing and it clearly was a politically advantageous time to do it with the growing distrust of corporations, the federal administration and carbon markets.”

In February of 2016 Jo Ann, Brent, Lenny and I had our very first in-person meeting with Alan, Khanh, Cary and Maggie in what would eventually evolve over the next two years into our core coalition steering committee. “The first meeting at *350PDX* with *Portland NAACP* and the other core BIPOC groups- that was the very beginning. It made sense for me to stay present for a while to see what happened, given the real openness of the groups around the table. I had concerns about what this was - who is doing it? What is the goal? It was a mix of sensing opportunity and wanting to stay close to it,” remembers Alan. “*350PDX*’s role in the beginning was crucial as an anchor organization to convene us,” Khanh recalls, also noting one of the many challenges we would go on to face in the early meetings was that “we weren’t as efficient- no organization was taking charge of organizing the meetings and keeping the coalition organized in between meetings. *350PDX*’s choice of Jo Ann to bring the coalition together, and later hire her as a contractor to organize the coalition was critical. Jo Ann made a lot of good decisions, and intentionally built a broad coalition.”

From the very first meeting, the discussion focused on the need to provide more coalition seats at the table for BIPOC organizations, what role each group could play in this forming coalition, and the kind of capacity that would be required from each group. The newly added BIPOC organizations did not have much additional capacity and had a lot of priorities they were already committed to. Maggie elaborates that she had been “the only full-time position related to climate issues [at *CCC*] for a while and my time had already been spoken for so I just had to work more. I also think the lack of expertise [of running such a campaign] led to hesitation of how to pursue it.” Lenny also recalls that “all these organizations, who had never done anything like this before, were very nervous to take something like this on.” As Khanh recalls, “It was always short meetings monthly at first, and I was overwhelmed with work already, so it was hard to squeeze it in. I saw the potential in this but also knew we would have to put a lot of capacity into it if we were going to be serious about it. We also knew we would need the power of *CCC* and the people at the table to even give this a chance.”

Khanh nonetheless kept coming to meetings driven by the fact that she also had a one-and-a-half-year-old daughter and was spending a lot of time reading with her because she was not sleeping through the night. “I was reading a lot of books about climate change and feeling a sense of urgency around near-term extinction. I felt in this moment that this is one of the most important things we must be working on. I also knew from working at *APANO* that people from the Philippines and Pacific Islanders were among those on the frontlines of the climate crisis.”

Perhaps paradoxically, it was due to this shared sense of extreme urgency around the global climate emergency that it became increasingly clear to us that we needed to slow down to allow time for relationships to develop and for the organizations to be able to build the staff capacity to participate more genuinely and deeply.

In order to get it right we needed to give ourselves more time: It would take another two years, significantly longer than some of us had anticipated, before we eventually felt prepared to launch our campaign. Before delving into the policy ‘weeds’, *we decided to first focus on some foundational goals:*

- Identify and recruit groups working in Portland that would help expand and formalize the coalition into a sustainable alliance between advocacy groups focused on racial and social justice, climate justice, and local/sustainable food systems that can more effectively advance our shared goals and values;
- Build an organizational operating framework for long-term collaboration that respects each group’s mission while identifying tangible efforts for collaboration and promoting shared values;
- Develop this effort in a manner that is transparent and honestly identifies and addresses historical conflicts, biases and other obstacles to collaboration, and that can serve as a model for collaboration in other communities;
- Produce an Operating and Strategy Plan

Building Trust is Foundational to Success

As pressure was mounting at the prospect of launching a campaign in 2016, and as we began to discuss the political landscape of the 2016 election, I wrote to Brent that I felt that “our success hinged on our ability to build a solid partnership with communities of color based on a deep mutual trust,” adding that this would take much more time than we would allow for should we decide to launch that year. This felt more foundationally critical than current political landscape considerations or even the urgency of fundraising and other preparations necessary to launch a campaign. It meant letting go of certain timelines. From the perspective of the BIPOC groups, *the environmental movement had a long history of either completely ignoring or, in more recent years, tokenizing their participation in coalitions rather than inviting them to the core decision-making table* from the start. As Alan describes, “We’ve been involved in a lot of processes with [carbon pricing groups], clean air groups, [...] wildlife groups, weatherization, renewable energy discussions- and it was always an uphill battle to really incorporate front-line leadership.”

We had to “move at the speed of trust”¹⁴ as Laura Stevens of Sierra Club later describes it.

¹⁴ Laura here quotes Adrienne Maree Brown in her book *Emergent Strategy*: “Move at the Speed of Trust” means: “How fast you can move is determined by how much trust you have. And people won’t trust you unless you are vulnerable with them.”

“Leaders met for years before getting anywhere close to developing a public campaign -- we had to build trust across green groups and frontline groups. Once the trust was built, we were then able to leap forward with a very aggressive timeline and take really big risks together.” -Laura Stevens

At some point, frontline communities are going to ask you something that you don't want to do or think that something else is a better idea, and it's important [for the mainstream environmental groups] to still listen to it, and that's a big change.” When asked about what his thoughts were about 350PDX's role in the early stages, Alan replied, *“Just being present, being open and willing to explore what it meant to center frontline leadership. Openness to learning a new practice” was what eventually helped build trust over time.*

It was because of a long history that most of the BIPOC groups ended up being extremely reluctant to invite additional mainstream environmental organizations into the core coalition until much later. Jo Ann recalls a mainstream environmental organization we had met with to seek their early support: “They said ‘we're not going to support if we're not part of leading the table’ and I told them that ‘we don't want them at the table.’ That was scary for some of the organizations in our coalition who had other working relationships with them, but, to the coalition's credit, they knew that I was right and that they trusted me given my long history dealing with groups like these...I think for the traditional environmental groups- they were used to dictating what roles organizations would play- it was a leap of faith when I pushed to stand firm and not bring them [into our coalition] until we were sure that the policy was firm and that it would benefit our communities.” Jo Ann's foresight was affirmed later when some mainstream environmental organizations later tried to delay the organizing of the campaign in order to prioritize their own political agenda.

The only other mainstream environmental group to be invited to join the early core coalition in mid-2017 was the *Oregon Sierra Club*. Explains Jo Ann: *“Oregon Sierra Club and 350PDX were very instrumental in understanding that they were not the ones to lead it but rather to provide support to frontline communities. All of us did the work, but what I appreciated is this intentionality and, because of this, those two were the majority white organizations to be at the table. Sierra Club and 350PDX were also critical because they are clear about their mission and have strong national [affiliates]. We couldn't have had better white majority organizations at the early table.”*

Jo Ann reflected that “one of the key lessons is that you have to have solid relationships with all the communities involved. Since we are centering BIPOC, we had to take the time to develop the relationships.”

“You have to go at the pace of the least experienced member of your coalition to ensure everyone is moving in the same direction, and to make sure that this would not distract from each organization’s core mission.” -Jo Ann Hardesty

Jo Ann recalls that at first we were on track to repeat the same mistake made all the time in the mainstream environmental movement of just asking BIPOC groups to provide their feedback and support, but then, in what became a pivotal and determining shift, we decided to be much more intentional about the steering table: Who was at the table and how that table would work. Jo Ann reflects how she “saw the wisdom of the process that it takes to build a trusting coalition, which is the foundation to building power.” “It was phenomenal,” Jo Ann intimated.

“I think if we [had launched a campaign] sooner, it would have felt like a transactional activity rather than building power. That’s what usually happens with environmental groups - there hasn’t been a concerted effort to bring communities of color along to craft policy [or run a] Ballot Initiative, it’s always an afterthought. The fact that we led with race and income inequality and climate mitigation/justice -a trifecta- was the first in state history.” -Jo Ann Hardesty

Building the organizational capacity of the core coalition groups also became a key goal. As Khanh recalls of that time “*APANO* had zero funding for this for the first two years- Lenny was the only one who, as a volunteer, did the heavy lifting of the early outreach effort. We didn’t have strong enough bonds between us and *350PDX*, and we had limited capacity. Otherwise I don’t think [the early pre-campaign phase] would have to take this long.” Another reason cited for hesitating to move forward quickly with a campaign was that, as Khanh puts it, the groups at the table “felt we didn’t have a lot of experience [with political campaigns]”. Indeed, *none of the organizations or organizational leaders at the table, with the notable exception of Jo Ann, had any experience running a political campaign such as a ballot initiative. Even the Portland NAACP, which Jo Ann led as President at that time, had never headed a major political campaign before or had any paid staff.*

In the late summer of 2016, instead of meeting at *350PDX*’s space as we had always done up until now, we decided to begin rotating our core coalition meetings between the offices/spaces of the different core coalition member organizations as an additional way of building relationships between us, beginning with *APANO*. The meetings many times included sharing a meal that was often culturally specific to the host organization and prepared by neighborhood vendors. Our

core coalition began meeting more regularly, every two weeks, with Jo Ann, Lenny and me meeting weekly for more frequent check-ins.

Building a BIPOC-led Coalition

In retrospect, there is clear consensus among coalition members that inviting the BIPOC groups to join the decision-making table early on, from the time that the policy itself was still being shaped and crafted, and allowing the coalition to evolve into one that was truly led by BIPOC, were essential to our ultimate campaign success and remained essential in the implementation phase of the measure.

When later the BIPOC core coalition members at the table were asked at what point they felt a sense of genuine ownership of the initiative process and the initiative itself, their answers varied. May 2016, about a month after her first meeting with the then newly formed core coalition, was the time that Khanh remembers first feeling ownership: “I was the earliest of the communities of color groups, probably because I felt the most obsessed about climate change.” For others the sense of ownership grew more gradually and did not fully manifest until about a year later “after our strategic planning retreat” Alan recalls of the 2-day retreat we organized in late June of 2017 that took place at *APANO*, which he saw as “an important trust-building experience.”

BIPOC leaders organized a retreat agenda together with Brent, Lenny and me, that included deep listening and focused on:

- Sharing with each other our own individual stories such as life experiences that shaped our personal and cultural identities and values
- Gaining a better understanding of the origin story of the initiative and how we got here; and a transparent understanding of who else had been at the table prior to the BIPOC groups joining
- An in-depth exploration of our most important shared core values as a coalition
- A ballot initiative campaign ‘101’ presentation/training delivered by Reyna Lopez, a locally based campaign professional¹⁵

“Reyna was super energized about the community-building and skill-building opportunities a ballot-initiative campaign could have for our communities. And the conversation with Brent and others was really valuable- it led us to be on a similar page, we got to know each other more, those relationships were key to creating the basis for our campaign,” Cary remembers. “I saw huge value from our retreat.” “I thought it was an important meeting,” Khanh later says about the retreat. “*It was about relationship building, laughter, and getting to know each other as human beings,*” adding that “it was around the same time when I pushed for and received *APANO*’s board endorsement.” Khanh also recalls that “we benefited from all the work that *CCC* and *Verde* did on building the existing relationships through the [*Environmental Justice Collaborative* and other past [work together],” and advising that those who “don’t have formal space to regularly get together around [environmental justice] issues will need to spend more

¹⁵ Reyna went on to become the Executive Director of PCUN (Pineros y Campesinos Unidos del Noroeste), Oregon’s Latinx farmworkers union.

time with relationship building.” Cary remembers another retreat that preceded and influenced the PCEF retreat “Khanh proposed bringing [Movement Generation](#) up to Portland to do a strategic planning retreat [for communities of color groups in our city] in the spring of 2017. That planning retreat helped ground us in a holistic framework around a regenerative economy, to push us to think about what we really need, not just what is politically feasible. PCEF emerged as being a unique opportunity aligned with this framework.”



Establishing Core Values

One of the important outcomes of the retreat was working together to establish our coalition’s commonly shared core values: a coalition building "best practice" that's easy to point to, but more difficult to achieve. Values that were discussed and considered by coalition members to be important included generosity, humility, honoring diversity and differences, creativity, patience, bottom-up relational organizing, building transformational (rather than transactional) relationships, courage, urgent and strategic resistance, joy, humor and fun. After some considerable contemplation, the coalition’s agreed upon core values were summarized as follows:

1. *Community. We value frontline communities and prioritize their leadership. We recognize that long term change comes from providing power.*
2. *Truth telling. We value honesty and accountability. We recognize that we can be direct and can treat each other with respect even through disagreement.*
3. *Justice. We value and articulate our cause as just. We recognize that we are claiming frontline communities’ rightful space in the climate movement.*
4. *Responsibility. We value our responsibility in service to the community. We recognize that our work must be excellent and transformational.*
5. *Care. We value each other and all people. We recognize that our time together is precious and appreciate each other.*

Chapter 2: The PCEF Campaign

Political Strategy Considerations: Legislative vs Ballot Initiative (BI)

At the retreat we began moving beyond initiative concept and launched what would become the first of an arduous many-months-long process to develop our campaign and political strategies. Key deliberations centered on whether it would be more strategic to pursue a legislative or a ballot initiative campaign (summarized in [Appendix B](#)) and on the strategic timing for launching such a campaign. A legislative campaign would be centered around a grassroots campaign to pressure Portland City Council to either pass the initiative policy themselves or pass it along for voters to decide on the ballot. A ballot initiative strategy, on the other hand, would have our coalition run a campaign to try and collect enough signatures to put it on the ballot ourselves and then run our own political campaign to get voters to pass it.

The considerations we discussed at the retreat and over the following 6 months ranged from concerns that with a legislative strategy the City might propose trade-offs and/or alter the initiative, to the opportunities a BI campaign would provide such as building our political campaign skills and political power, particular for BIPOC groups. We concluded that ultimately, regardless of which strategy we chose, the initiative would likely end up on the ballot, with the only major difference being who would be referring it to voters: City Council or our coalition community groups. “In part, what motivated [our decision] was the polling analysis” recalls Alan. Community groups with a long history of representing and serving disadvantaged communities poll as significantly more popular with the public than City Council and the coalition felt it was better to have an offensive campaign with us as protagonists than affording the opposition an opportunity to portray it as an overreaching City Council.

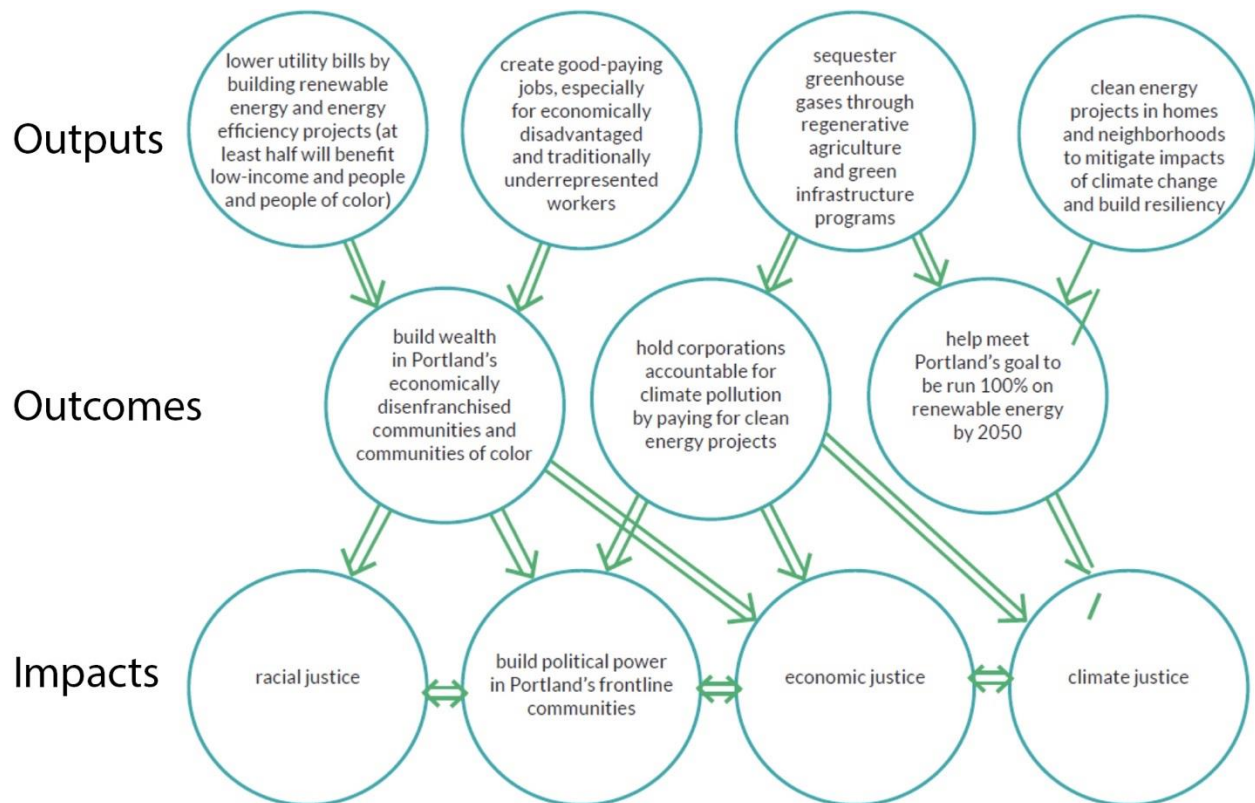


Image credit: Simone Crowe

Decision to Run a BI Campaign: Taking PCEF Directly to the Voters

Alan recalls, “We made a decision at the retreat to go for a BI campaign. We didn’t have a campaign yet. No plan, no roles and responsibilities. What happened was that we had folks who knew what to do, but were deferring to frontline groups, and we had frontline groups who knew what they wanted but didn’t know how.” Although we had agreed to prepare for a BI campaign at the retreat, we agreed to leave the door open to legislative strategy and set up additional conversations with City Commissioners. “I had significant reservations because I felt we didn’t have a ton of capacity,” remembers Khanh of her thought process at the time. “I knew we had more experience with legislative campaigns. I had a zero-sum view of capacity- if we were already operating at 100% capacity, where would the remainder come from? None of us had any experience with ballot initiatives either.” Our coalition would continue to waver back and forth multiple times on this deliberation until we finally filed the finalized BI text in early 2018.

In our interactions with our City’s elected officials it is also significant to note that, at the time, only one City Commissioner, Chloe Eudaly, fully supported our initiative and our efforts from the start; one Commissioner leaned toward supporting, but expressed concerns about wanting to make sure the initiative would not interfere with any potential future statewide gross receipts tax legislation that could fund other purposes before supporting PCEF; two commissioners wished to remain neutral and non-committal; and the mayor told us that he was generally supportive of the type of programs the initiative would fund but staunchly opposed to the gross receipts funding

mechanism on large retail corporations.¹⁶ The following year, after we had launched our campaign, the mayor would come out with public statements that reiterated his opposition to our funding mechanism and provided the press with statements that mirrored some of our opposition’s talking points¹⁷ ([Mayor sorry to see clean energy on ballot](#) Portland Tribune, 8/8/18). Just over a year later, after PCEF’s overwhelming election victory, the mayor’s tone would change, calling for the City to [declare a climate emergency](#) and calling PCEF “[a nationally acclaimed model for climate action](#)” (City of Portland press release 9/25/19).

Political Strategy Considerations on Campaign Timing: May Primary Election vs November General Election

The discussions on timing stretched on for a few months, far past what we had originally determined was an important decision deadline. Depending on whether we were discussing a November 2018 or May 2019 election target date, it would have either given us less or more time to fundraise, build our coalition and collect signatures. As Maggie notes, “Picking the election cycle was a big [decision].” In addition to political considerations, we also gave thought to whether to pursue a BI at the City or County level (summarized in [Appendix B](#)) as well as to the question of whether it was better to choose a May primary election vs a November general election (summarized in [Appendix B](#)). As Cary recalls, there was “a lot of deliberation” on the issue of timing, “but in the end our timeline fit better with November.” *Ultimately, the determining factor was when the BIPOC groups in our core coalition felt they had enough trust to take big risks together and launch a campaign.*

Policy Language: What PCEF Funds & Distribution Process

PCEF, the [Portland Clean Energy Community Benefits Fund](#), will be granted to local non-profit organizations (alone or in partnership with other nonprofits, businesses, or government entities) to implement the following:

¹⁶ The mayor suggested we replace a gross receipts tax with a tax on net profits instead, a mechanism that would not have raised the same amount of revenue with a 1% surcharge and, more importantly, would be much easier for large corporations to evade using tax loopholes and shelters. He also tried to get our BIPOC coalition leaders to meet with big business interests and utilities to see if we could find an alternate solution and drop the measure, something that never ended up happening.

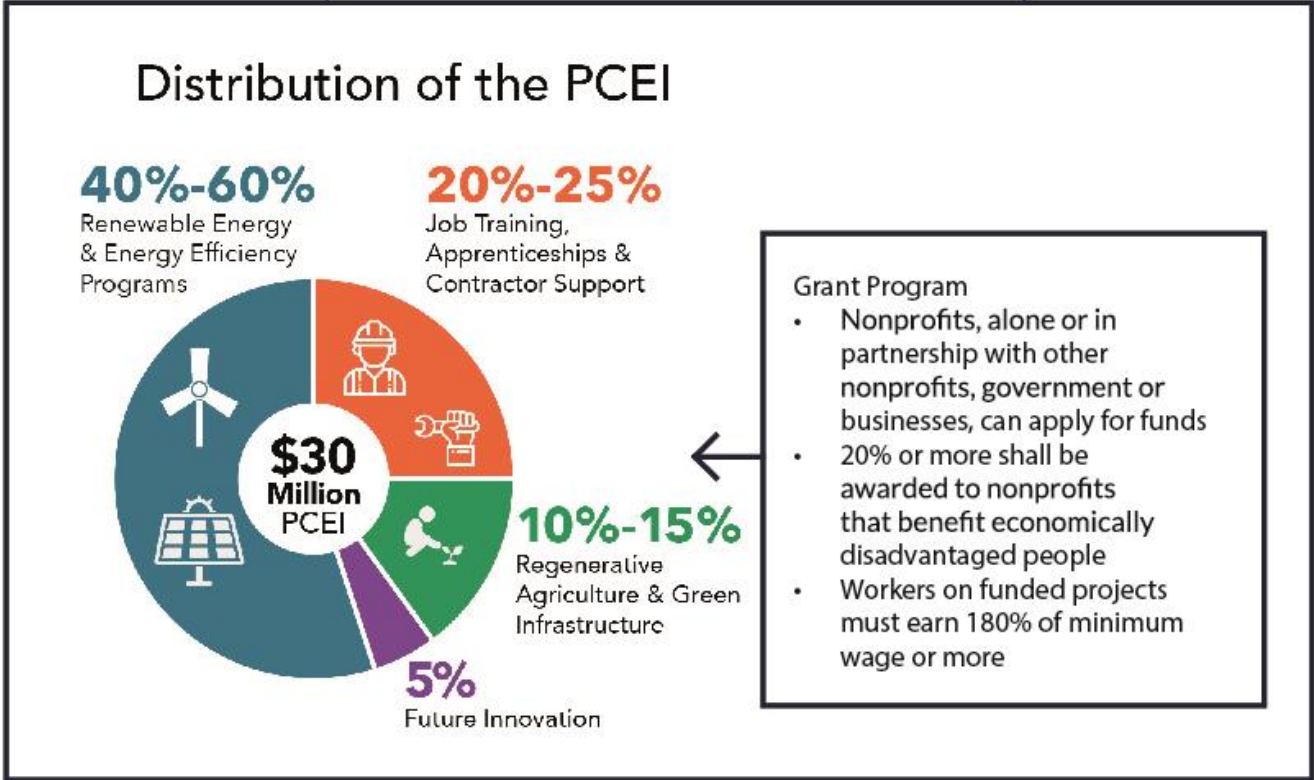
¹⁷ For example, the mayor was quoted in the press as stating “For me, right now, housing and homelessness and education are the top priorities,” thus implying that the climate emergency or climate justice were not a top priority for him and using a ‘false dilemma fallacy’ that he or the public had to choose to prioritize only one or the other.

Fund estimated to generate \$30 million+ annually

- 1% surcharge on large retailers
- must make at least \$1 billion/year
- must make at least \$500 thousand/year in Portland
- City of Portland collects 1% of annual gross revenue from retail sales in Portland
- groceries, medicine and health care services excluded

Grant Committee

- 9-person committee designs grant program and makes funding recommendations
- Will adopt a workforce and contractor equity plan
- Each Portland City Council Commissioner nominates a member; these first 5 recommend 4 more
- Committee members must be Portland residents and reflect Portland's diversity; must have demonstrated commitment to furthering the City's Climate Action Plan and empowering historically marginalized groups



Adapted from: Simone Crowe

40-60%: Renewable energy and energy efficiency programs.

- This may include residential, commercial, and school-based programs.
- Community-based and decentralized energy strategies are high priority.
- At least 50% of projects should specifically benefit low-income residents and communities of color.
- Programs must ensure rent stabilization.

20-25%: Clean energy jobs training, apprenticeships and contractor support.

- This may include non-profit programs that directly facilitate and promote job training, pre-apprenticeship programs, apprenticeship programs, and contractor training and support that are primarily aimed at supporting economically disadvantaged and traditionally underrepresented workers in the skilled workforce (including people of color, women, people with disabilities, and chronically unemployed).
- Programs supporting entry into labor union-registered apprentice trades shall be a high priority.

10-15%: Regenerative agriculture and green infrastructure programs that result in sequestration of greenhouse gases.

- Programs funded under this category should be designed to help demonstrate and promote the broader adoption of such practices, with a particular focus on low-income communities and communities of color.

5%: Future innovation.

- This may include projects that do not fall under one of the other categories, but which provide an opportunity to further the goals of the Fund.

To ensure equity is integrated into its implementation, PCEF will be administered by a grant committee made up of nine experts and community members. Five members of this committee will be appointed by each of the City Commissioners, and four will be appointed by the first five appointees. They will collectively have significant demonstrated experience in the following fields:

- *Residential renewable energy and energy efficiency projects;*
- *Commercial renewable energy and energy efficiency projects;*
- *Workforce development, job training and apprenticeship programs that are targeted at reaching historically disadvantaged groups;*
- *Experience promoting minority-owned and/or women-owned businesses;*
- *Sustainable local food production, green infrastructure and greenhouse gas sequestration; and*
- *Financing tools that help make renewable energy and energy efficiency available to a broader spectrum of the public.*

Key Policy Deliberations

Equity

Alan and others helped shape the draft policy language and ensure the strongest possible equity language throughout the initiative. As Alan describes, “One of our main concerns was that other powerful institutions would inevitably compete for this funding so much of our drafting was to try [...] to make it as easy as possible for frontline groups to be competitive by incorporating

governance and funding priorities and standards.” For example, to quote an excerpt from the final initiative text, it promotes “*geographical diversity, with the goal of funding projects that operate at the neighborhood level (including east of 82nd Avenue), as well as citywide*” and provide “*support to neighborhood-scale organizations to develop and expand their organizational capacity to implement projects on a larger scale.*” Paige points out that “Portland west of 82nd Ave would be the second richest state in the nation; east of 82nd Ave it would be one of the poorest in the nation.”

“[PCEF] wasn’t drafted as a climate measure and then had social and racial justice tacked on. But rather both were co-equal goals from the start” explains Brent. Having Alan and other BIPOC leaders help shape the policy turned out to have a significant influence on the final policy language. As Brent recalls “[BIPOC leaders] were involved in all parts, from the spending side, such as deciding what the different pots of money would go for and how much was in each pot...to the make-up of the grant committee, to what percentage of recipients have to include minority contractors.” For example, the measure states that grant committee appointees must “*reflect the racial, ethnic and economic diversity of the City of Portland. At least two members will be residents living east of 82nd Avenue,*” the fastest growing and significantly underinvested area of Portland that has a much younger and more racially and ethnically diverse population and that -up until Jo Ann was elected City Commissioner in the same November election in which voters passed PCEF- had no City Commissioners represented on Portland City Council who had their residence there. Additionally the measure specifies that grant committee members have “*demonstrated commitment to furthering the goals of the City’s [Climate Action Plan](#) and empowering historically disadvantaged groups, including women, people of color, people with disabilities, and the chronically underemployed.*”

Other examples of equity provisions in the measure include language that stipulates that projects receiving funding:

- Prioritize US-made renewable energy products
- Agree to a Workforce Contractor Equity Agreement developed by the Committee
- Meet family wage standards

In addition to making funding recommendations to the Mayor and City Council, the Committee would evaluate the effectiveness of the Fund, for example that 20% needed to go to non-profit groups with a history of working in low-income communities. In order to create a new type of funding category for green jobs, non-profit organizations that provide technical assistance to and policy advocacy for minority owned businesses, as well as attorneys with experience in minority contracting, were consulted. This was accomplished, for example, through the utilization of soft language, such as “should” rather than “must”, (since legal requirements proscribed the utilization of hard numbers) and incorporating *inclusive language with metrics/reporting requirements* and corrective action from the City. The initiative text includes a directive to:

“adopt a workforce and contractor equity plan to ensure that the work funded by the Committee is being performed by historically disadvantaged groups, including measurable and ambitious goals for the training and hiring of historically disadvantaged groups...and measurable goals for contracting with businesses owned or operated by such groups...Progress in meeting these goals

shall be prominently displayed on the Committee's homepage and, if goals are not being met, shall be the Committee's top priority to address."

Another challenge was to develop metrics that would promote and support local contractors. Brent explained, "We took the strongest percentages of any municipal body and embodied those into the program. But there's some tension between setting the highest contractor standards [e.g. setting the highest wage standards] and ensuring jobs and projects remain accessible to disadvantaged populations and minority and women-owned contracting businesses." He concludes that after discussion with our core coalition and other key stakeholders, including minority contractor advocacy groups and union leaders, "We came up with a good balance."

Accountability: Ensure Implementation Follows Letter & Spirit of Initiative

The issue of building strong accountability measures into the initiative was one that was very important to all coalition members. Brent summarizes how "we built very clear and legally binding side-boards into the measure: 1. Where the money could be spent with specific ranges of categories of spending. [The City] cannot just take the money and divert it, it's got to fit into those categories; 2. We put a commission in charge of implementing it, where the commission members will have diverse backgrounds and certain expertise in various areas. We also had a clear mission statement in the bill itself and reiterated throughout the measure what we mean." Accountability was at the core of why our coalition deliberated extensively on the nature, size and make-up of the grant committee that would oversee the fund and make recommendations to City Council on which projects to fund. As described in our campaign FAQ document, "A Commission comprised of Portland residents, appointed by the City Council, will oversee competitive proposals for use of the funds. All members of the Commission will reflect the racial, ethnic, and economic diversity of experience and backgrounds important for successful implementation of the measure. Each member must have strong interest and experience in reducing greenhouse gas emissions, acting on climate change, and advancing racial and economic justice." As Alan explains, we also made it so that the "grant committee sets evaluation metrics for program and workforce and contracting standards...and the grantee will have to report on those- both financial and/or environmental or economic outcomes...the measure [also] requires an annual financial audit and a biannual performance audit."

We anticipated that our opposition would try to deceive the public in arguing that the funds would not be used for their intended purpose by pointing to well-worn talking points about purported government inefficiencies/waste. To try and head off such arguments, we incorporated a 5% limit on administrative spending to prevent administrative costs from siphoning off more funds than necessary, although it can be exceeded in the first 2 years as the program is being built. The administrative costs needed to collect the surcharge are not included in the administrative cap to in no way hamper the City's collection process.

Making the Case for Targeting Big Retail

What the funding mechanism for PCEF would be and who would pay were also based on considerations of justice and equity. While state or national taxes based on carbon may make sense in a broader policy perspective, they are seen as hugely controversial and, in most cases, have not succeeded. Based on research and early polling, our coalition felt that there is strong

public support for making the largest retailers pay both because there is a clear understanding that they are not paying their fair share and because even a 1% tax on them can generate significant revenue. Also, unlike manufacturers, they cannot leave the city that imposes the tax. If *Home Depot* or *Walgreens* want to sell in a given city then, generally, they have to continue to stay in a given city; thus *the most common anti-tax argument that 'we will leave if you tax us' rings hollow.*

As stated in the measure:

Large retail businesses [...] share responsibility for generating a substantial portion of the City's overall greenhouse gas emissions [...] and [have] an incentive to remain in the City to engage in retail activities here.

If these businesses desire a healthy consumer, then they should also pay their fair share for a healthier city. But as our campaign's FAQ document also points out that many retailers also “pay low wages and generally don't invest in our community. For every dollar spent at a national retail store, only 58 cents get recirculated back into the local community as opposed to 73 cents of every dollar spent at a locally-owned store.”

We looked at 10-15 different definitions of ‘retail’ with the goal of making it broad. Brent explains that this was in order to “not give these large companies a way to wiggle out. Most everything is included other than manufacturing, utilities and wholesaling. The definition we used included banks and insurance companies etc.”

Making the Case for a Gross Receipts Tax

The gross receipts tax on large corporations was already part of the concept that Brent first introduced to core coalition members prior to formation of the coalition or crafting of the policy language and was a concept that he had carefully thought through. As he explicates, “Retailers have huge revenues and pay very little tax...*large corporations know well how to avoid taxes on their profit by hiding their profit [for example in tax shelters] so there is little point to such taxes. They cannot hide from gross receipts taxes* or even taxes on gross profits [defined as revenue minus the cost of goods sold]. Furthermore, there is a clear political value of taxing 1% on gross receipts versus the 3-10% tax on profit” to achieve the same total revenue. Alan encapsulates this same sentiment by describing how a gross receipts tax has “fewer accounting loopholes to obscure the amount of profit.”

“1% from the 1%”

The 1% business license fee was thought to be a small enough amount to sound small, yet big enough that it still generates a lot of income. “Politically the difference between 0.5% and 1% is not much,” explains Brent “we taxed gross revenue, so 1% made sense and polled well [...] If one taxes gross profit, which is everything minus cost of goods you're selling, then 2-3% is entirely reasonable. You have to make sure the amount you generate will be really significant.” Much later, during the campaign, Cary developed the concept of “1% from the 1%” as a campaign slogan and talking point.

Before filing the initiative, in an unsolicited move, the City’s Revenue Office came out with other possible scenarios for us to consider, such as further broadening the business categories beyond just ‘retail’ and instead applying a 0.5% surcharge to every one of the approximately 900 corporations that earned over \$1 billion in gross revenue. They also suggested capping the amount of surcharge that any one business must pay at \$1million. The City could not legally inform us, however, about the amount of estimated revenue or how many businesses or what businesses our tax would affect. After brief consideration, our core coalition decided against this suggestion not only to avoid the political dangers of going after a much broader and even more powerful group of industries, but also because we deliberately exempted industries such as manufacturers that might more convincingly threaten to move to another city or state and utilities that could more easily pass on the cost to the consumer. We also did not find it good policy to cap the revenue for the largest, most profitable corporations and “[the union-backed coalition] didn’t want [us to institute a surcharge cap] since they were considering a gross receipts tax at the state level and they didn’t want this precedent,” recalls Lenny. “We were easily persuaded.”

Estimating the number of billion-dollar-corporations in Portland or the total revenue that the fund would generate proved quite challenging. Through the City we learned that franchisors were typically the ones who paid the City’s business license fees (rather than the franchisees). However, since the public does not have access to our City’s confidentially-held business license fee collection data, we prepared an internal business revenue estimate for our proposed funding mechanism based on national revenue averages of either per store or per square foot sales.¹⁸ This led to *our initial estimate of \$50 million revenue annually, which later turned out to be fairly accurately aligned with the City’s Revenue Office’s post-election estimate.*

Preventing Unintended Consequences

Maggie Tallmadge of CCC was particularly concerned early on about potential unintended consequences of the initiative on BIPOC and low-income communities. The issue needed to be well researched before she would actively advocate for it within CCC. This research ended up providing evidence that a gross receipts tax would indeed have little to no effect on prices of large retailers serving low-income communities. As later explained in our campaign’s FAQ document, “Many national retailers have standard pricing irrespective of local fees, enabling them to advertise sales nationally. There is no research or evidence that indicates this would meaningfully affect demand or hurt consumers. Since the increased business license fee would be only 1% of gross receipts, any impact on the price of goods would be extremely small and well within the range of normal price variations. Additionally, The *Oregon Center for Public Policy* (OCPP) shared their own research with us that corroborated our findings and allayed any remaining concerns at the time. Later on, in August of 2018, in the midst of our campaign, the City Club of Portland would further substantiate this in their own [independent research](#) report.

¹⁸ For clothing and non-fast food retailers we estimated revenue by taking the physical size of the store and multiplying it by the national revenue per sq foot for that company. For fast food and other stores we estimated revenue on a per-store basis, again based on published national averages.

“Current research does not support the [opposition’s] claim that a relatively small corporate surcharge, such as 1% on large businesses, would negatively affect capital formation, prices, or wages.” -[City Club of Portland research report](#)

The Measure also *tried to strike a balance between encouraging landlords to upgrade their units to be more energy efficient or to invest in solar, which would make their properties more valuable, and making sure that renters saw the ultimate benefit* and that such upgrades do not become the basis for increased rents that could push more renters out of the Portland market. “The initiative could not legally mandate landlords to not increase their rent, but it could encourage participation by those who pledge not to do so,” explains Lenny. “Multnomah County requires a ten-year moratorium on rent increases if they do the weatherization and the state of Oregon just passed a rent control ordinance that limits rent increases.” “That’s something that the grant committee will have to develop further” explains Alan, “how to turn the language stating this into something enforceable that prevents displacement and housing instability.”

Urban Regenerative Agriculture & Green Infrastructure



There were differing thoughts among the core coalition groups on the importance of including funding for urban regenerative agriculture projects at all. Portland has more urban agricultural land than some other cities, so some saw that regenerative agriculture and food justice might also be an opportunity to bring in more folks involved in local farming, urban agriculture and food justice. Lenny, who did much of the early outreach to local food groups, describes having had a “hard time getting endorsement from food groups because they didn’t think food and hunger should be political.” Other coalition members view regenerative agriculture and *food justice as an integral part of climate justice* and envision replacing our food system -one that is currently based largely on extractive monopolistic industries, including factory farms, that perpetuate some of the [most egregious and globally destructive climate](#), environmental and social injustices along with untold mass animal cruelty- with a plant-based one that is accessible to all, treats its workers well and restores soil health and its natural capacity to sequester carbon, conserves water, increases food security and preserves natural habitat for pollinators and other animals.

Brent envisions that future projects that could grow out of this include “more support for community food gardens in low-income areas of the city and subsidies for farmer’s markets east

of 82nd Ave where residents could obtain free vouchers...in addition to reducing all the prices at these farmers' markets by, for example, 20%.”

Deliberations on Funding Transportation Projects Hit Roadblock

Transportation is responsible for ~40% of emissions in the Portland area and is continuing to steadily increase. Although our coalition would have been eager to incorporate the funding of equitable emission-reducing transit solutions into PCEF, current state regulatory barriers prevented us from being able to do so in the context of our City measure. Several members of the PCEF coalition have been pursuing other avenues to try and address this urgently needed policy gap.

No Need to Reinvent Policy Wheel

Brent's strong advice to those seeking to replicate a similar model is: “Don't reinvent the wheel; we have a framework that a lot of people hashed out already. [Our BIPOC-led coalition] did the hard work with the idea that it could be a model. Then one can adjust for one's own local position and situation and build on it.”

Passing Portland's 100% Resolution: Setting a Path

Many allies across the region had been working together for years fighting off the seemingly inevitable proposed fossil fuel export facilities across the Pacific Northwest.



Photo credit: Rick Rappaport

In 2014, several of our organizations formed a coalition that would eventually succeed in passing a resolution, followed by a landmark binding ordinance: the Fossil Fuel Terminal Zoning Amendments that banned all new fossil fuel infrastructure from being built in our City. This was hailed as the first legislation of its kind in the nation and a major grassroots victory. The ordinance was upheld by the Oregon Supreme Court in lawsuits instigated

by the fossil fuel industry, the Building Trades and the *Portland Building Alliance* (PBA; also

known as the Portland-Metro area's Chamber of Commerce), the latter of which would later go on to lead the opposition campaign against PCEF.

While our coalition of environmental groups was working to pass the ordinance banning new fossil fuel infrastructure at Portland City Council, we also began discussing the need to pass a resolution that would transition our City to 100% renewable energy and began working toward it. In 2016, as *350PDX* and other environmental groups were in discussions with the mayor and other City officials about resolution language, several of our core coalition's BIPOC leaders were brought into the discussion with City officials to help shape the resolution and ensure that strong equity language was integrated throughout. At the time our core coalition discussed how passage of the 100% resolution might help us set the path for a policy concept such as PCEF, particularly if we eventually wanted to pass policy through City Council. In 2017, on the same day President Trump declared that he was withdrawing the U.S. from the Paris Climate Accords, both the Portland City Council and Multnomah County Commission unanimously voted to adopt 100% renewable energy targets. Today, *the City of Portland's 100% resolution, with its strong equity language, commitments of community-based renewable energy infrastructure and bold goals of achieving 100% renewable electricity by 2035 and 100% renewable energy in all sectors by 2050, is being used as a model resolution across the country.* Although our core coalition ultimately decided to take PCEF directly to voters through the ballot, getting our City Council to pass such a comprehensive 100% renewable energy resolution provided a clear public rationale for the bold type of legislation that PCEF embodies and may also have helped overcome potential opposition from less supportive City Commissioners during our campaign.

Building a Large Diverse Coalition

Initial outreach and coalition-building efforts began months to years before the ballot measure would be drafted and finalized. Brent recalls that “at the very beginning, it was a pretty lonely room for quite a while. Lenny was a friggin’ machine - the sheer number of individuals he did presentations to was staggering.” Or, as Alan put it, “Lenny was mysteriously doing work for months and months that we didn’t know about” that helped lay some of the early foundations of what would ultimately become *one of the largest most diverse coalitions in our City's history.* In retrospect, some felt there could have been better communication during this early outreach phase, although there was also some acknowledgement that the then newly-formed core coalition had been meeting on a monthly basis for the first year, with most of the BIPOC groups not having much additional capacity in the very early phase.

Lenny describes having had about “ten conversations each week from the late spring of 2015 until signature gathering started [in May of 2018]. I was trying to first build support from natural logical allies, starting with our own organization,” which he describes as having been “a real pain. We had to do this elaborate dance because everyone on our [*350PDX*] Board was either opposed or extremely nervous because we had never done anything like this, and they had no confidence that it could work.” “The faith community was a great source of early support,” recalls Lenny, who worked with *EcoFaith Recovery*, a progressive faith-based community, to obtain endorsements from faith leaders. “*Having communities of color leadership [in our coalition] helped us get the first faith leaders to endorse*”. Working with other volunteers, he then spearheaded the effort to reach out to Portland’s neighborhood associations and community

organizations. “Being able to say we had the support of the core coalition organizations and more than 50 faith leaders worked really well, for example, with neighborhood associations and small non-profit organizations. It would never have worked with just 350PDX and the Portland NAACP.”

Lenny also reached out to other environmental groups and influential members of the community that he had access to “to get their take on [PCEF] and the network by probing who was going to get us to the next person we want to meet with [...] I sometimes made mistakes thinking that some of the groups that I had connections with seemed like natural allies, but I shouldn’t have been the one to ask, it might have been more successful if the communities of color groups had been able to make the ask.” It was not until after our initiative qualified to be on the ballot that big greens and big labor were willing to endorse. Lenny felt these endorsements were ultimately won in large part because “communities of color social justice groups told them ‘you’ve always asked us to endorse, now this is the first time we’re asking you to do so’.” Indeed, to Tony DeFalco (*Verde’s* past Deputy Director and now Executive Director) “that early work we did, that Alan was part of, was key to building the foundation [of the PCEF coalition]. *Verde* made a contribution there. During the campaign there was a lot of connecting-type work with connections I had in communities of color and mainstream environmental organizations. Having those relationships was really important.” A longtime community leader, Jo Ann was also very involved in the early outreach to some of the key community and social justice groups.

“Have as many people as possible who have the capacity and skills needed for successful networking and ‘one-on-one’ meetings.” -Lenny Dee

“Most people can learn these skills,” Lenny says, “such as making sure you get to know the



US Senator Jeff Merkeley with Marcus Mundy and Jenny Lee on visit to PCEF campaign office

person, learning who they are and sharing who you are. Once you really listen to and recognize their concerns without taking it personally, and address the concerns as you can, they may eventually turn around.” Lenny recalls that the “reasons for hesitance varied widely from climate hawks that believed there were more efficient ways for reducing greenhouse gases and didn’t understand the social justice component [...] to fears of us being slaughtered by corporations and that it would set the climate movement and/or their own legislative agendas back forever.”

Getting most of the Portland delegation of State Senators’ and U.S. Senator Merkeley’s

endorsements was “important in that it brushed aside any critiques from the local liberal establishment,” according to Alan’s assessment. “Being frontline-led allowed us to change the calculus of groups we reached out to for endorsements.” Similarly, Tony feels that “mainstream environmental organizations have come onto the idea that they needed to follow communities of color [...] PCEF was the first time that we pushed it at this scale in a big way and it all paid off.” Many who Lenny had approached about PCEF had “initially said ‘no’ to supporting or endorsing. Easily 50% went from being very hesitant when first hearing about PCEF to eventually saying ‘yes’.”

The core coalition had also agreed to 350PDX’s hiring of Derek Smith, who has strong ties to the solar industry, as a short-term consultant to do some initial outreach to industry stakeholders, and to work with Alan and Jo Ann to ensure an equity framing remained front and center in these conversations. Derek then handed over these connections to our core coalition, who would take over outreach to businesses, as well as associations and alliances related to solar and energy efficiency. However, Brent notes that although “there was support from a number of businesses, which was helpful, few if any big businesses that would be taxed under the measure were supportive. No surprise there.” Obtaining endorsement from *Business for a Better Portland* was among the many that required the leadership from the core coalition’s BIPOC groups. The same was true for Jo Ann’s and other core coalition members’ successful efforts to receive endorsements from social justice and affordable housing organizations, among others. By the November 2018 election PCEF received over 300 endorsements, including the following:

- Nearly 50 diverse **community organizations**¹⁹
- 10+ **labor unions and union groups**²⁰
- 50+ **local faith leaders and groups**
- 10+ **housing advocates**²¹
- 50+ **businesses**²²
- 10 **community agriculture**²³
- 20+ **neighborhood associations**
- 20 **environmental groups**²⁴
- 5 **local newspapers**²⁵

¹⁹ Community groups include: *Oregon Latino Health Coalition, Urban League of Portland, League of Women Voters of Portland, Oregon Food Bank, Northwest Health Foundation, National Association of Minority Contractors Oregon, and Oregon Citizens’ Utility Board*

²⁰ Labor includes: *Columbia Pacific Building Trades (27 trade union affiliates), Oregon Tradeswomen, Oregon AFSCME Council 75, IBEW Local 48, Portland Association of Teachers, SEIU 503*

²¹ Housing groups include: *Community Alliance of Tenants, Hacienda CDC, Rose CDC, Portland Community Reinvestment Initiatives*

²² Businesses include: *Business for a Better Portland, Beneficial Bank, Los Mayos Taqueria, Equal Exchange, Sunbridge Solar*

²³ Agriculture groups include: *Friends of Family Farmers, Portland CSA Coalition and Zenger Farm*

²⁴ Environmental groups include: *350.org, Friends of Trees, Food & Water Watch, Oregon Children’s Trust, Neighbors for Clean Air and Oregon League of Conservation Voters*

²⁵ Press endorsements include: *The Portland Tribune and El Hispanic News*

- 30+ notable individuals and elected officials²⁶

In addition to being able to tap our large and diverse coalition for everything from field volunteer recruitment to donation solicitation to social media amplification, it also ultimately allowed our campaign to individually collect legal forms and affidavits (allowing us to use their names as signers) from 307 endorsers across 23 variously themed statements submitted for the November 2018 voters pamphlet. Paige and I, who compiled and submitted the endorsements, were informed by an elections official that our campaign set a new record for the number of voters' pamphlet endorsements for any one citywide measure. By contrast, our opposition submitted seven statements in the voters' pamphlet with only a single endorsement signer aside from the opposition's own Political Action Committee.

One of the most challenging and remarkable endorsements to obtain for PCEF was from the Building Trade Unions and was one of the first times in Oregon history where the Building Trades partnered with environmental justice and grassroots environmental groups in support of an environmental initiative.

The story of how this came to be is a compelling lesson in navigating the tensions largely brought about from a fraught history between the Building Trades, environmental groups and the renewable energy transition at large, and is therefore worthy of exploring in more depth.

Building a New Kind of Bridge with the Building Trades

Early Enviro Outreach to Trade Unions Faces 'Red Line' to Green Path

When I initially reached out to local labor leaders in late 2015 on behalf of our coalition, we were encouraged to meet with the Building Trades early on, but was forewarned that if we hoped to earn the Building Trades' support for PCEF, then groups like *350PDX* would need to stop opposing fossil fuel infrastructure projects, in particular the *Jordan Cove* LNG export terminal.²⁷ In particular, we were advised that at a minimum, we should go from opposing to being neutral on key projects, calling it a 'red line' not to be crossed for the Building Trades. For those of us fighting for a livable planet, stopping fossil fuel infrastructure projects was similarly akin to a 'red line'. I described how we want PCEF to help bring about a just energy transition for our City and see the Building Trades as having an essential role to play both locally and beyond, and we want to listen to and understand what kinds of concerns the building trades might have and

²⁶ Notable individuals include: U.S. Senator Jeff Merkeley, Van Jones, Naomi Klein, Bill McKibben, City Commissioner Chloe Eudaly, Oregon House Speaker Tina Kotek and nearly the entire Portland delegation of state house representatives and all but one of Portland's living former mayors

²⁷ Jordan Cove is a massive LNG export terminal and connector pipeline project being proposed for Southern Oregon by a foreign energy company that, if approved, would become the single largest carbon emitter in our state, in addition to threatening hundreds of waterways and rural communities.

what they would want to see incorporated. The labor leader replied that although the overall concept of our initiative might theoretically be a good one, many Building Trade leaders saw these types of just transition jobs that environmentalists were promising both locally and nationally as more like distant future possibilities that may or may not be realized, whereas *Jordan Cove* [LNG export terminal] was seen as providing immediate ‘shovel-ready’ jobs if approved; moreover, the fossil fuel infrastructure work were typically union work, unlike a preponderance of the jobs currently provided in the renewable energy and energy efficiency sectors.

Lenny also reached out to the *NW Carpenters Union* as well as Jon Jensen, at the time a political representative of *IBEW (International Brotherhood of Electrical Workers Union) Local 48*, in the early phase before the policy draft had been finalized, but “the conversation didn’t move much at that point- they just said they sort of liked it, but were unresponsive after the first conversation.” Lenny recalls, “I then realized that I wasn’t the appropriate person to make the ask. That’s a major lesson I learned.”

*“You have to have the right person make the ask or it won’t work.” -
Lenny Dee*

Jon later recalls his early conversation with Lenny and remembers his skepticism at the time. “I didn’t know if the Builders would vote for this. I had never seen anything like it.”

Building Trade Leaders on Balancing ‘Values’ with ‘Duty’

When asked whether the trade unions had concerns at the time about endorsing an initiative backed by environmental groups that were often on opposite sides of fossil fuel infrastructure fights, Jon replied, “Yes, of course it did.” Interviewees agreed that this dynamic presented a challenge and highlighted the importance of “trusted messengers” in creating the connections and making key asks. “Yes, there were concerns. *Jordan Cove* [LNG export terminal] would provide millions of work hours for unions,” states Willy Myers, Executive Secretary-Treasurer at the *Columbia-Pacific Building Trades Council*. “*The renewable energy industry has so far not been high-wage union jobs. It’s sometimes a challenge to balance my beliefs with my duty.* The Building Trades have been both aware and see their role in the transition [to renewable energy], our members are already doing it, but we also have a lot of members working in the fossil fuel industry.” When asked about the climate crisis, Willy responds, “I absolutely see it as a crisis, on the level of extinction- rising sea levels, losing islands and our oldest cities. Elected officials are not taking it seriously enough. At the same time, I have to worry about balancing other interests. Right now, we still have a fossil fuel-based transportation system and a very powerful industry.” What largely moved Willy to support PCEF was that “we [at the Building Trades Council] have had *pressure from rank and file to do more of this renewable energy economy*, especially from Millennials and Gen Z. We want to pass the torch to them and were looking for projects that help renewables and saw that we could get behind PCEF.”

Another concern of the building trade unions stemmed from their past experience with *Clean Energy Works of Oregon (CEWO)*; now called *Enhabit*, a near decade old non-profit organization that runs a federally funded program to retrofit homes for greater energy efficiency. According to Jon, the weatherization jobs created by *CEWO* were “entirely non-union” and “harmful to unions because it became a non-union program.” Additionally there was also past distrust among certain PCEF advocates of color and the building trades; the Building Trade groups perceived certain groups like the *National Association for Minority Contractors* to be “anti-union”, and certain BIPOC viewed the Building Trade unions as largely inaccessible to minorities.²⁸ In the spring of 2018, Paige expressed to us that the Building Trades almost always side with business and that therefore she thought we were highly unlikely to obtain their endorsement; getting them to be neutral should be our goal and would be considered a win.

Fears that PCEF would repeat the past mistakes of *CEWO* were somewhat alleviated by language in the measure that ties it to statewide legislation titled Oregon’s *Energy Efficiency and Technology Act*, requiring projects funded by PCEF to, among other things, *provide wages at a rate equal to at least 180% of the state minimum wage*. Moreover, *it was important to trade union leaders that PCEF would “create a pipeline to apprenticeship by funding pre-apprenticeship training that feed into apprenticeship programs that lead to careers, not just jobs”* as Willy put it. In a meeting between our coalition’s BIPOC leadership, the Building Trades and the *BlueGreen Alliance*, Willy also remembers appreciating that “PCEF would pay for pre-apprenticeship training programs. *IBEW*, for example, has apprenticeship programs, but not pre-apprenticeship, which are done by others [...] We saw PCEF as an opportunity to fund stipends, childcare etc. for such programs.”

BIPOC Leadership Key to Getting Unions on Board

One PCEF coalition representative who was at some of the meetings with labor unions described how the public sector unions were hesitant to endorse PCEF at first because they “felt that we would screw up the revenue conversation at the state level by using a gross receipts tax that would piss off business and then business wouldn’t come to their table.” However, despite this early tension, Tony recalls how *getting the public sector and service unions on board to endorse PCEF, including SEIU (Service Employees International Union) and AFSCME (American Federation of State, County and Municipal Employees) locals, proved to be “relatively easy” because “there were some relationships there [...] When this opportunity came up with PCEF, it was easier to have the conversation”* thanks to relationships that were, in some cases, 20 years old. Paige also noted that the building trade leadership “liked *Verde* as a successful business that built good labor relationships and provides skilled jobs to under-resourced neighborhoods.”

²⁸ Willy admits that the building trades are “not as diverse as we should be to be reflective of community” with only roughly “9% of women in the trades workforce nationally, and only 7% in Oregon with only 1-2% being women of color.” He explained how the building trades are trying to change that, but have only begun making more of a concerted effort “in the last four years, after having lost ground when, among other issues, *CTE [Career and Technical Education]* was taken out of our education system 30 years ago.” As Paige put it, the Building Trades leadership “couldn’t deny that communities of color were not getting the resources that they were promised. Alan and Tony wore them down with the undeniable importance of what we were doing.”

In comparison with the public sector unions, Tony recalled that getting the trade unions on board to endorse “was tough,” perhaps, he reflects, because of some past history where they had “partnered with the trade unions and it didn’t work out.” In addition, he recalls how at the time there were a number of other initiatives that would be on the same November ballot that the trade unions were being asked to endorse and PCEF “was lower on their priority list because it was an environmental initiative, which puts up red flags...The challenge for trades is where are the jobs going to come from- the more they can see them, the easier it is.”

One of the BIPOC core coalition leaders emphasized the *importance of timing*, saying they had advocated “to have labor at the table earlier, but [a couple of the other BIPOC leaders in our core coalition] didn’t want to do that until we were ready and strong enough with a more fully fleshed out policy. I feel like [they were] right to wait.” Tony reflects: “the fact that we were this diverse coalition was very interesting to labor, rather than just being comprised of environmental groups.” According to Jon, for many trade union leaders “there is an earnestness about redressing past racial issues...Many of our members are from traditionally marginalized communities. You can’t believe how many electricians we’ll need over the next 20 years in a major transition due to climate change. So I could not tell them that their union would oppose PCEF. I didn’t think our organization was going to originally support it, but in the case of PCEF there was no choice.”

When asked what factors led to their decision to endorse, Jon recalls that “having Alan and Tony come and speak very knowledgeably about the apprenticeship pipeline piece and show us the polling data [on PCEF] helped build unanimity for endorsement. We were totally listened to and our concerns addressed,” adding that “Willy did a ton of work to get the endorsement vote. He grabbed it and helped his folks see the possibilities. A month after that we were on board, which I found very shocking, because before that the business lobbyists came to us and tried to get us to fight with them against it,” remembers Jon. “Building Trades are more accommodating to business than the service unions are and we often side with business. I don’t know what magic Willy pulled off and how he brought folks around, but he did. Our unions are democratic institutions and he nailed that one.” Jon also gives major credit to one of their union leaders, Robert Camarillo, a Hispanic American, who after Alan had pitched our initiative to them, had been “especially supportive” and asked his fellow leadership ““how could we *not* support it?””

“With the trades, early and often engagement is critical - which we did- and it’s not always enough. Some of the criticisms we faced was that they claimed they didn’t know about it, but they did. There were no guarantees to endorsement until late, and it took a lot of meetings and handholding to get there. I had been ready to throw in the towel, we had worked our butts off, worked in good faith and transparency, but we agreed to stick with it and shortly after that they endorsed. Don’t give up is the lesson learned.” -Tony DeFalco

“Really sincerely try to work with your local Trades Union. We are not always easy to work with since we always protect our members’ jobs over all else, and we gave Alan a lot of pushback at first, but he was really direct with us that one of the cool things about this measure is that this is the first time communities of color -the environmental justice community- owns it in such a radical way. At that point we refused to fight this concept and became hopeful about the message [...] I am shocked that I am a true believer. It’s going to be awesome.” -Jon Jensen

Jon reports being “thrilled that [PCEF] worked out as well as it has. It was very trust-building between environmental justice groups and the Trade Unions.” Although he remains somewhat skeptical about relationships between the Building Trades and mainstream environmental organizations, Jon describes having “a lot more optimism about what we can now do together because we were able to build a bridge and have better outcomes for all.” Alan similarly sees one of the greatest outcomes from the PCEF campaign as being “the relationships” that he and his organization have built “with labor and environmental groups.”

National Interest in PCEF Beginning to Grow among Building Trades

Since PCEF passed, Building Trades from around the country have expressed interest in the idea, including those in Denver, Minnesota, and California. Willy sees the biggest opportunity of PCEF as blazing a path “to be the first city to accomplish the creation of the types of clean energy jobs that build union careers and set the standard for other regions to set similar policy.” For all his early skepticism, Jon now says “I would do anything for PCEF. We [the Trades] build America; I would love to see [the PCEF] model inspire us nationally.”

“I appreciate your modeling of what it looks like to put in the work and good coalition building and crafting a good policy. At the beginning I would have told you, you were crazy, but you have done some of the best work with the City of Portland that I’ve seen. I hope the message is that we should center the voices of those most impacted and least able to deal with the results of climate change.” -Jon Jensen

Blueprints for a Strategic Campaign Plan

In late 2016 we formalized a BIPOC-led decision-making process for our core coalition based on a consensus model. We also began discussing the very beginnings of what campaign planning might look like. Although Brent had no longer been participating in the monthly in-person core

coalition meetings, he and Jo Ann worked together to craft a blueprint for how to build the foundations of a ballot measure campaign. This would allow our core coalition to begin educating ourselves about what it would take should we decide to eventually pursue one. It included the following components:

1. Building Supporters. The goal would be to have by filing 15-20 organizational supporters that would be active in supporting the initiative, and an additional 40 that would be listed as endorsers.²⁹

2. Developing a strategic campaign plan. The campaign plan would be drafted and then collectively refined by the campaign steering committee.³⁰

3. Creating outreach & communications infrastructure. Key outreach materials and communications infrastructure would be developed.³¹

4. The formalization of a steering committee. Members would be selected through consensus.³² The Steering Committee would be fully independent and operate as a Political Action Committee (PAC) that would administer an account for project funds.

5. Fundraising. Fundraising tasks would include major donor research/identification, major donor meetings and solicitation to build a solid financial foundation for a successful campaign launch.³³

²⁹ Building a diverse list of campaign supporters with a primary outreach focus on organizations and individuals engaged in social justice, climate change, renewable energy/energy efficiency, and sustainable local food production. Outreach efforts could include email and personal outreach and meetings with target organizations, education about the measure and its goals, solicitation of formal support.

³⁰ The detailed plan would craft metrics including: voter analysis and voting trends, poll results evaluation, a campaign timeline and calendar, campaign budget, signature collection plan, primary messaging, key messenger identification, paid and earned media and communications strategies, a fundraising plan, a campaign budget, grassroots outreach strategies, volunteer recruitment and management, and organizational infrastructure and staffing design.

³¹ This would include: Short and in-depth versions of outreach flyers; Website development; Social media platform creation (Facebook, YouTube, Twitter); A 90-second grassroots video explaining the measure aimed for promotion/distribution on social media

³² Priorities for new committee member recruitment could include: organizational leaders, strategic experts, priority funders, and other key allies.

³³ Target donors would include individual major donors already involved in funding climate change and/or social justice causes, as well as companies invested in renewable energy and energy efficiency. Foundations focused on 501(c)(3) non-profit work would not be targeted. The ideal fundraising goal for the preliminary period would be to have the funds needed for the collection of the 34,156 required signatures to qualify for the ballot in addition to a 3-months operating budget raised by the time of measure filing.

6. Measure finalization and legal review. The text of the measure would be finalized and evaluated, reviewed, and amended, if necessary, for legal compliance with city, state and federal law.³⁴

Early Fundraising

After continuing discussions with the core coalition, I took on the task of leading a collaborative grant writing effort. As Executive Director of *350PDX* at the time, this meant making the difficult decision as an organization to *prioritize the relatively newly formed BIPOC-led core coalition over some of 350PDX's other organizational fundraising needs*, a move that was not welcomed equally by all in our organization's leadership. At the time, none of the other core coalition members, aside from *NAYA*, felt their respective organizations had the capacity to take on the crafting or fiscal administration of grants that would fund the early stages of our work together. *350PDX* was also asked by the core coalition to take on the processing of donations for the coalition's 501(c)(3) work in the early pre-campaign phase. Although *350PDX* had the smallest organizational operating budget among the core coalition members and was only three years old, *350PDX* had a large base of active volunteers who were predominantly white and more privileged, and so felt it was important to step up, particularly when asked by our frontline partners to do so.

I also recognized the importance of securing funding to increase our own organization's staff capacity to more fully support this coalition work moving forward as well as to prioritize the longer-term work of incorporating Justice, Equity, Diversity and Inclusion (JEDI) across all of our organization's work. These were priorities that *350PDX's* staff and board saw the need for and supported. This included essential prerequisites for the type of coalition work we were embarking on, such as reviewing our organizational structure and decision-making processes, and building our base of volunteers and activists trained in JEDI and grassroots organizing. These investments would later prove to have a significant and lasting positive impact on the organization and our long-term partnerships with BIPOC.

We raised ~\$165K in grant funding from five local/regional foundations³⁵ to support our collective early pre-campaign work and basic staff capacity for many of the core coalition member organizations. We tried unsuccessfully to apply for funding from several national foundations as well, making the case that if our efforts are successful in our city, it could become a national model for other U.S. cities.

³⁴ This blueprint also included a sample budget for the pre-filing phase of a campaign at roughly \$75K which would include contractor work, legal services, web/database design and set-up, graphic design and in-kind services.

³⁵ *350PDX* received grant funds from foundations including *Meyer Memorial Trust*, *RSF Social Finance Foundation* and *Bullitt Foundation*; *NAYA* received grant funding from *Spirit Mountain Community Fund*.

Perhaps we did not initially receive national funding because we were not running a national- or state-level campaign and funders did not recognize PCEF's potential as a replicable model, or perhaps funders thought it couldn't be done (as we later heard many times when trying to raise funds for our campaign). In either case, our ultimate success will hopefully facilitate the task for coalitions in other cities trying to do something similar to more easily obtain early funding.

Political Landscape

There were a number of important factors in our political landscape that impacted some of our decisions and the timing of our campaign, including other potentially concurrent legislative or ballot initiative campaigns that might either hurt or help ours. Two examples include:

- A prominent progressive public employee union-backed political organization launched a ballot initiative campaign (Measure 97), to pass a statewide gross receipts tax on businesses³⁶. The Measure 97 campaign would draw out most of the same big business opposition as our initiative would, were it to be on the ballot at the same time. Moreover, the Measure 97 campaign was not at all keen on sharing the election season with another BI seeking to pass a gross receipts tax of any kind, and we did not want to upset potential allies. In November of 2016, Measure 97 received 60.6% of the vote in Portland despite being defeated statewide.³⁷ By holding off we were able to observe Measure 97's shortcomings and incorporate important exemptions as well as a higher level of accountability into PCEF.
- A politically well-connected, mainstream environmental organization that was leading a coalition effort to pass a statewide 'cap and trade' bill. As Lenny recalls, "They were very hesitant and counter-productive about it at first, since they had their own agenda and didn't want ours to interfere with their statewide agenda... they thought we would lose and that it would set a bad precedent or, if we won, that Portland legislators would think 'the City of Portland is taken care of' and wouldn't care as much about passing statewide legislation." To complicate matters further, a few of the core coalition members were also

³⁶ Measure 97 would institute a statewide 2.5% gross receipts tax on businesses with sales over \$25 million to fund education and health care.

³⁷ Even after the election there were still some liberal-leaning establishment organizations that opposed us on the grounds that *if* we lost our campaign to raise a gross receipts tax in more progressive Portland then it *might* hamper a potential future statewide effort to raise a larger statewide gross receipts tax for other purposes. BIPOC were being told by large establishment groups, to whose legislative tables they had not been invited- that they had to wait their turn indefinitely, until such time that they had a chance to pass their own legislative priorities.

part of the larger ‘cap and trade’ coalition and were concerned about the timing of a PCEF campaign, which further delayed our progress.³⁸

This situation prompted Jo Ann to propose that we meet with the entire Portland delegation of state legislators. This turned out to be one of our core coalition’s most strategic decisions, remembers Alan: “[Portland state legislator] Denbrow said he thought [our initiative] was complementary to and not in conflict with statewide climate goals...That was a really important meeting. It helped us be able to get [the large mainstream environmental organizations] and the Democratic institutional apparatus from soft opposition to neutral, and ultimately to supportive because they saw this could even be helpful in a statewide push.”

Jo Ann recalled her early outreach to large mainstream environmental groups, anticipating that it would be particularly challenging for these groups to take a backseat to BIPOC: *“In my 30 years of experience in environmental justice work it’s rare that communities of color have a decision-making seat at the table.”* This experience led to added tensions when, in response to Jo Ann’s request for early PCEF fundraising support, these groups placed the condition that they needed to be able to be in a position to direct the funds. Given the past history of larger environmental groups controlling or co-opting the environmental agenda, these groups were not brought to the decision-making table until the policy was finalized.

The election of Donald Trump further shifted the political landscape, with his abominable climate-denial and white nationalist rhetoric and agenda. In Portland, this brought about a massive outpouring of new people who wanted to support grassroots groups such as *350PDX*. The election also instigated the core coalition to begin discussing the need for a more cohesive, holistic agenda as part of our larger coalition work, including both pro-immigrant rights and anti-white supremacy work both locally and statewide.

Chapter 3: Launching the Campaign

The Launch

Campaign Expertise: Our Critical Mountain Guide

In the early summer of 2017, we began to speak more concretely about campaign planning and strategy. We began carefully accounting for all of our in-kind staff time as direct lobbying time, many months before officially launching a campaign. We also consulted with [Bolder Advocacy](#), who provide a very helpful resource library on the legal aspects of running a political campaign. Shortly after this, our core coalition inquired with two experienced campaign professionals about their interest in being our campaign manager, though both declined. It was around this time that Brent recruited *Paige Richardson, one of the nation’s most experienced campaign veterans*, to

³⁸ Recalls Maggie: “I was concerned that the timing [of the PCEF campaign] would harm [CCC’s] existing relationships with the mainstream environmental organizations that were leading the statewide carbon pricing effort because they were not on board [with our initiative] at first.”

join our meetings and impart her wisdom to our coalition, which had no prior political campaign experience.



Campaign guide Paige Richardson

Paige made it clear from the onset that, although we were unable to afford her services at market rate, she had become so impressed and inspired with what we were trying to accomplish that *she generously contributed an enormous amount of pro-bono time* to us over the course of the next year. She volunteered to serve as our mountain guide, using the analogy to describe her role as the “*person who knows the (campaign) mountain and helps guide others to do a difficult task, but doing it with them, providing the trail, providing the political expertise and guidance on how to structure a campaign, etc.*” Paige was drawn to volunteer with PCEF because she saw it as a “triple dream come true: a triple bottom line investment – economic, environmental justice and racial justice. I felt this was a long-term investment; truly coaching other people, not just do it myself.³⁹ I had been asking the universe for this opportunity to take the skills I’ve gathered and share them. I want to live my values, and with PCEF I was able to do that.”

³⁹ Paige explains: “The reason you don’t get low-income people of color working as campaign staff is that they can’t afford to do so; you’re guaranteed to lose your job at the end of a campaign, and it has poor entry wages. I had had very little contact with communities of color, because they were largely segregated out of the campaign world.”

Paige also brought a professional legitimacy to our campaign and used her political capital, for example with ‘Big Greens’ and ‘Big Labor’, to help serve as a bridge to traditional power structures who want to be in relationship with BIPOC. In one of her most impactful contributions, she mentored Alan as he navigated his new role as PCEF’s campaign manager, the first time he had served in such a role. Alan saw “Paige as a guide, thought partner, dispenser of wisdom and experience. Paige was super critical. Indispensable.” Paige generally advises *those who are new to political campaigning to “find an experienced professional to help” and/or*



“start earlier. You may not get someone to do it full time, but you may be able to get enough guidance so that you can figure out how to do it, especially if you face significant opposition.”

Deciding to Launch

Our core coalition remained relatively small through the end of 2017, with a small group of individuals representing 7 organizations, 5 of which were BIPOC. Starting small allowed us to focus on our relationships and on the content of the initiative and did not let many outside groups have a role in drafting the measure. But the early process was not without its challenges, especially in the first phase of our campaign. In mid-2017 Jo Ann, who had been playing a key role, left our core coalition to launch her own campaign for City Commissioner, leaving a leadership vacuum. As Khanh recalls, our campaign “didn’t have any paid staff at the time. We should have been better organized.” “The people who knew how to win- Brent, Paige- were also defaulting [decision making] to frontline leadership”

recalls Alan.

Things really started to change in early 2018. “*Verde, CCC, NAYA and APANO* huddled up at a climate convening in Oakland, CA, and discussed how to have a clear leadership structure, organization, clear agendas, tightly facilitated meetings, timelines, deliverables, and careful planning” remembers Cary. Maggie recalls: “it’s hard to do appropriate planning without prior experience, so we had to just dive in and figure out what we needed while we were doing it.” Decisions were moving forward under the assumption we would raise the money and resources we needed. A couple of the other core coalition members were still wavering and anxious about launching a ballot initiative campaign when, as Lenny recalls, “*Alan stepped up to take the lead and said let’s make this happen.*” It was also around this time that the core coalition began to meet weekly, connect with other campaigns that might be on the 2018 November ballot, select our chief petitioners, hire a local attorney experienced with BI (Margaret Olney, recommended to us by Paige) to review our measure language before submission, begin to plan for volunteer training, and prepare ourselves to launch our campaign in March.

Developing a Political Steering Committee

In early 2018, we expanded our core coalition steering committee, inviting *Portland Audubon*, *Oregon Physicians for Social Responsibility (OPSR)* and *Columbia Riverkeeper*. All of these were majority-white mainstream environmental organizations, but with strong histories of grassroots organizing. *350PDX* had a history of working with all of these organizations, and they were some of our strongest and most trusted allies in our fossil fuel infrastructure fights across the Pacific Northwest. *The steering committee was very intentional about which organizations they invited and representatives from these organizations were all individually interviewed and carefully vetted by the core coalition's BIPOC leadership to ensure they would follow and support frontline leadership.* This meant not just deferring to BIPOC leadership on decision-making matters and having BIPOC be the public face of the campaign, but also having their respective organizations prioritize the campaign by stepping up and committing significant resources and capacity. These relationships proved symbiotic, as articulated in Micah's description of *Portland Audubon's* supporting role in the campaign: “[*Audubon* was] a connective tissue between the diverse frontline community of PCEF and other traditional conservation groups and political players [...] Within the coalition, we were able to lend our relationships and experience to the strategy of the campaign. We were able to bring strategy and lessons learned from past campaigns yet also found it to be a great learning experience for us on how to center justice and equity.”

When asked whether there had been anything that the mainstream environmental groups could have done better during the campaign, Alan reflected that in some instances there was some “hesitance to share valuable knowledge out of concern of stepping on communities of color leadership.” Laura similarly reflects on how “*privileged groups at first had too much of a tendency to lean back, and frontline groups asked us to lean in more, which we then did. But privileged groups were very happy for frontline groups to be the spokespersons, hold more weight in decision-making, etc., while privileged groups did more of the grassroots campaigning.* The communities of color staff on this campaign were the most exceptional campaigners I've ever worked with. We felt our way through that as a privileged organization, learned as we went, and it was important to continually reflect on whether and how to step up or step back.” “There was definitely internal tension between stepping up and stepping back” similarly recalls Micah. “Bob [Sallinger with *Portland Audubon*] and I took the mentality that we need to step up and play the roles that frontline leadership asked of us and where our experience would be most helpful, but also to take a step back and defer to frontline leadership. This new way of doing things [in the PCEF campaign] did not always seem straightforward to me, but I needed to trust the process.”

“It was more important to stay true to frontline leadership, even if it went counter to past experience.” -Micah Meskel

There was general agreement among BIPOC leadership that all the mainstream environmental organizations in our core coalition had not only grown and learned a tremendous amount about

what it means to center frontline leadership from the PCEF experience, but had fulfilled their respective commitments and played key supporting roles throughout the campaign.

The last to join our steering committee, shortly before our campaign launch was *OPAL Environmental Justice*, a BIPOC-led base-building organization who most of our groups had worked closely with and had been trying to recruit into our core coalition for over a year, but they had been over capacity.

Preparing to Launch Signature Gathering

On January 18th, after our attorney had reviewed and made any necessary adjustments to the measure language, E.D. Mondainé and I, as PCEF's co-chief petitioners, filed the necessary paperwork with the City. At this point we had already secured 60 endorsements, including our first neighborhood associations and affordable housing organizations. Having had no dedicated paid campaign staff until halfway through our campaign, *the core coalition's more privileged environmental groups were requested to chip in as much political money as they could afford early on*, which ranged from \$5K-15K, as well as encourage their membership to donate to the campaign, so that our newly formed Political Action Committee (PAC) would have a budget to start from while we began to plan our fundraising efforts, including the \$7K we needed in order to cover the legal expenses associated with the filing preparation for our measure. Over the next month *all core coalition groups were pushed to make significant commitments of in-kind staff, signature collection pledges as well as fundraising*. We formed our first three steering committee working groups: Fundraising, Strategic Planning, and Communications, and began discussing our campaign's website launch, logo design and what to name our campaign. The name had to be much shorter than the ballot title and should not be confused with *Clean Energy Jobs*, the campaign for statewide cap and trade legislation. Some of the names we considered included *Portland Just Energy Transition*, *Green Jobs Green Homes PDX* and even *Portland Green New Deal* (ironically, we had decided against the latter name because we felt no one would understand what a *Green New Deal* meant at the time, almost a year before the concept became nationally popularized). Our pollsters advised us to adopt the *Portland Clean Energy Fund* (PCEF) as our campaign name, with the tagline '1% from the 1%'.

In addition to our campaign not having any dedicated staff at the start, we also needed an affordable campaign headquarters space from which to operate. *Oregon Sierra Club*, headed by their relatively new Executive Director Trevor Kaul, answered the call by drafting up an MOU that *generously offered our campaign a dedicated space out of their office as an in-kind political donation* and by allowing us to hold our frequent meetings in their spacious conference room. At the height of the PCEF campaign *Oregon Sierra Club* practically let the campaign take over their entire office, as Laura describes that "we ran 90% of the campaign out of *Sierra Club's* office; so our office went from housing five people to housing fifty people per day during peak campaign season. It was a zoo." In reciprocal fashion, the PCEF campaign would energize *Sierra Club's* own volunteer base as well as help attract new volunteers who, because of PCEF's campaign headquarters location, "came through our office and therefore associated PCEF campaigning with the *Oregon Sierra Club*," recalls Gregory.

Legal Hurdle: Opposition Challenges PCEF in Court

On February 2nd, 2018 we received our ballot title from the City, a critical piece since often the ballot title- the title and a short summary of the measure that goes with it- is the only thing that some voters will base their decision on. We were very pleased that the title accurately portrayed the measure's intent, being very close to how we would have chosen to write it ourselves. This also meant that we would not have to be the ones to challenge the title in court, something that is frequently a part of filing an initiative. We could instead stand with the City in defending the title against our opposition, who we anticipated would challenge it. Our opposition, spearheaded by the *Portland Business Alliance*, challenged both the initiative title and some of the language. The time we had for the signature collection period was very tight to begin with and shrinking by the day; any delay would run down our clock and decrease or even eliminate our chances of meeting the City's signature collection deadline. "The opposition tried to keep [PCEF] in court as long as possible to run the clock out," suspects Jo Ann of the commonly used legal tactic to hinder a BI campaign, further speculating that "they did not believe we were organized enough to have a chance."

Upon seeing our opposition's challenges, none of which were substantive, we decided to resubmit a second version of our initiative within a few days with some technical fixes, and have it be processed by the City in parallel with our first filing, just to cover our bases. The judge assigned to our case was also a factor, since judges have the leeway to make some fateful determinations. The court date for our first petition filing was set for March 23rd, 2018, but we ended up deciding that it would be better to withdraw our first petition so that our second one could take the lead spot, which delayed the court hearing by nearly a month. Our [opposition filed two challenges](#) to our ballot title (including objections to the terms 'surcharge' and 'clean energy' in the City's proposed ballot title "Authorizes surcharge on certain retailers; funds clean energy, job training" and arguing that it should instead read "Imposes tax on certain retailers' sales; funds energy-related projects") and one challenge to the measures' constitutionality on a largely technical matter, the latter of which we felt fairly certain would be tossed out by the court. We also consulted with *Earthjustice*, a non-profit national public interest organization dedicated to litigating environmental issues, to help us defend our use of the term 'clean energy.'

On April 20th the *Multnomah County Circuit courtroom*, which is typically only attended by the attorneys representing the parties involved and perhaps a small handful of observers, was instead packed to the brim with racially and ethnically diverse community members wearing green in a virtually unprecedented public display of support for PCEF, a display that even surprised the judge who noted it out loud. Arguments were heard on both sides and, with our coalition getting increasingly anxious with every passing day, the [judge issued his ruling](#) ten days later, resoundingly in our favor. The campaign was now a go, having reached the cusp of the cut-off date after which we thought it no longer possible to gather the necessary number of signatures by the City's July 6th deadline. *With less than 8 weeks to go from the time we received City approval for our signature petitions*, we had them printed and scrambled to put together the first set of signature gathering kits in time for our May 12th kick-off event (marking the official launch of our campaign), we knew that *gathering the necessary ~34K valid signatures needed to qualify for the ballot would be an extraordinary feat.*

Despite Alan galvanizing and energizing the group, there was a great deal of anxiety among the steering committee members about our state of affairs, particularly in the early phase of our campaign. I remember my own sense of heightened nervousness at the disarray of not knowing the depth of the waters we were about to dive into headfirst. We did not yet have a campaign plan or a clearly laid-out path as to how we would accomplish even our initial goal of qualifying for the ballot, much less winning at the ballot in what was sure to be a David and Goliath fight against some of the largest corporations. Alan, in contrast, despite also lacking any prior campaign experience, nonetheless seemed to exude an astounding level of confidence and kept himself cool and collected through the turbulence. On occasion, when Alan sensed a high level of stress in meetings that felt contagiously dooming, he would facilitate a collective pause with a few deep breaths, modeling a more mindful collaborative practice, and reminding us to *give it our all but to keep focused on solutions and next steps rather than a sense of continual urgency* absorbed by the myriad of challenges we faced.

Re:Powering Campaign Leadership

In late April of 2018, about two weeks before we were planning to officially launch our campaign, Maggie forwarded to our steering committee an email she received from a colleague who recommended to her a 3-day intensive campaign training in Seattle called *Camp Wellstone* hosted by an organization, later re-named *Re:Power*, that aims to *build transformative political power through leadership training -particularly with marginalized communities- to create radical change*. A few of us -Maggie, Alan, Jenny and I- decided to register, take the train and room together in Seattle. We divided ourselves among two of the tracks (Campaign Track: How to win progressive campaigns as a campaign manager, staffer or volunteer and Grassroots Organizer Track: How to win on grassroots organizing and policy issues). Alan remembers these trainings as being “super important. This helped us build our campaign plan.” The trainings included workshops and role-playing exercises on a wide variety of topics ranging from building a strong leadership team, effective messaging (including media, persuasion scripts and *GOTV* (*Get Out The Vote*; a strategy to make sure registered voters who are most supportive of your campaign actually vote), organizing one-to-one conversations and building your volunteer base to in-depth strategic campaign planning, strategy and tactics, “for example, how to calculate a ‘win’ number based on doors knocked, mailers, etc.” recalls Jenny, for whom the trainings were “very helpful- a fantastic opportunity to just understand all the different pieces of a campaign ahead of launching ours.” “Wellstone was another pivotal point for us because we gained a little more of the knowledge -besides Paige- and tools we needed to set up the framework, budgeting, and timelines” recalls Maggie, adding “I hope they develop one specifically for Ballot Initiatives.” When asked whether, in retrospect, there were additional types of training she wished she had ahead of our launch, Jenny reflects “for Communications, it would be helpful to learn the basics of messaging and values framing,” and that it would have been helpful if she had had some “prior experience from volunteering on other campaigns” because “you can’t imagine it until you’ve experienced it.”

Signature Gathering

Defying the ‘Impossible’

There were a number of outside seasoned political campaigners and potential funders who did not believe it would be possible for us to obtain the required number of signatures in the short amount of time we had, especially given the additional handicaps of never having run a ballot initiative before, having no dedicated campaign staff and having only a few thousand dollars in our campaign bank account. Because of this, for a short time, we had even contemplated whether to file an additional petition with the County for the May 2019 election, as a back-up plan. *“The biggest thing to stress is that people will tell you that you’re going to lose,” which Brent recalls happening with PCEF, “when you can actually win if you’re thoughtful.”* Paige recalls how *“we had no campaign infrastructure- no mailing list, no email list, no member list, no funder list, no volunteer list -zero assets- and had to borrow everything from the core coalition organizations and supporters. That’s unheard of in campaign world.”* She calls our ultimate success in light of this *“phenomenal.”* When asked what similarities our campaign had to a typical campaign, Paige replies that there were *“very few similarities; we needed to have some of the same basic tasks completed- fundraising, communications, field etc. But other than that, there were far more departures than similarities,”* from our unusual decentralized campaign structure to the use of in-kind campaign staff from multiple organizations with little to no prior campaign experience, to the high degree of volunteer engagement and, in particular, to the BIPOC leadership.

We were repeatedly forewarned by our veteran campaign guides that we would have to adjust to being comfortable with a level of chaos that our community non-profit organizations may have never before experienced and that virtually always accompanies political campaigning. By then we had firmly decided we would no longer turn back, but *rather chose to fully lean into our launch in what might best be described as a whirlwind of chaos.*

Volunteer Team and Frontline Leadership

Prior to the launch of our campaign, a team of volunteer leaders representing a variety of supporting grassroots groups (including *EcoFaith Recovery, Climate Jobs PDX, Oregon Sierra Club* and *350PDX*) had been meeting for many months with some regularity to prepare for the eventuality of a campaign launch. These volunteer leaders who were among the most excited and earliest to commit themselves to PCEF but who had, prior to the court ruling preceding the launch, felt largely in the dark, directionless and disconnected from all the back and forth deliberations that were happening at the steering committee level. This may have been partly due to the high degree of confidentiality that was kept around all of our steering committee’s politically and strategically sensitive deliberations and partly, according to some, because for a long time Lenny had been the only person who participated in both sets of meetings and therefore the only one who could convey information between the groups. Shortly prior to our official launch, Micah of *Portland Audubon*, Jasmine of *Columbia Riverkeeper* and I would also join the volunteer team as steering committee members, in addition to a fast-growing base of dedicated volunteer leaders.

Some of the feeling of disconnect between our volunteer leadership team and our steering committee would linger throughout the campaign. *“There wasn’t enough coordination,”* reflects

Gregory Monahan, lead volunteer organizer for *Oregon Sierra Club*, “so we were basically forced to self-organize. If we could have had someone like Paige to train a few people who are committed full time, train them an hour per week to build their basic campaign organizing skills, that would have made a huge difference.” “Traditionally the volunteer base is white middle class, in part because they have more time and space to volunteer” reflects Micah “the steering committee was communities of color-led. So it would have been helpful to find some capacity for a communities of color rep to be part of the volunteer team, which would make it more intentional from day one about how we’re centering frontline communities. Lenny, you and I played some role in trying to connect these groups, but we struggled at times.” In addition, Micah observed that “there was some conflict and struggle in the form of an urgency to hatch a plan and get into the field- and that urgency caused the volunteer team to jump out ahead of the coalition’s steering committee. It created some inefficiencies and we needed to pause to make sure we were all aligned. The lessons are that *there needed to be a stronger connective tissue between steering and our volunteer team* - more intention is necessary, for example, in the creation of the [signature kits] and strategies on signature gathering. There was tension between the strategy being advised by those who had done that sort of work before and the importance of needing to embed it in the leadership of our volunteer team. It’s important not to waste volunteer time.” “Traditional white groups were following frontline leadership” recalls Gregory, “but there was still the question of how we work together to get things done. The coalition was still forming and learning things, the steering committee was resource bound and at capacity, and we had a new group of volunteer leaders who didn’t have organizing experience. Given these circumstances, I feel we did the best we could do.”

The Race against Time & Chaos

Gregory recalls how he had to take matters into his own hands to make sure “we had things ready to begin gathering signatures [by the time we launched]; we had to put together the first set of signature gathering packages and we had to have an organized way to recruit people to signature gathering trainings and events. I went and bought some of the materials we needed to make the key parts of the packet.⁴⁰ We organized signature gathering kit-making pizza parties and set up a volunteer production assembly line, which steering members also participated in. We ended up making ~3000 starter signature kits and used all of them- about 500 at a time.”

A launch party for May 12th was organized with a very short turnaround time- as soon as we heard the court’s verdict and had our first set of signature kits ready to distribute- with food, music and a short energetic lineup of our campaign’s leadership; even Brent came down for the occasion, helping to organize the launch and bringing with him a keg of local brew to share. *By launch time PCEF had garnered over 100 organizational and business endorsements* and over 100 of the 120 attendees at the launch party signed up and were trained on the spot to collect signatures, leaving the party with a signature gathering kit in hand. Indeed, *despite all the ordered chaos, or in some respects perhaps because of it, the volunteer team kicked into high gear shortly before the launch* out of sheer necessity and would remain so through the end of the

⁴⁰ The kits included: a copy of the initiative, city-approved signature sheets, a sheet with the key talking points, a clip board, a few pens and visible signage taped to the back of each clipboard (which were made inexpensively out of corrugated cardboard and rubber bands).

signature gathering phase. *“We were cooking” recalls Gregory, “we had to just keep at it and be relentless.”*

Challenges and Benefits of a Decentralized Structure

We estimated that we would need to gather a minimum of 40K signatures if we wanted to ensure having enough valid ones to qualify and calculated how many volunteer shifts we would need to fill. Given our extremely tight timeline, we knew we would also need to hire some paid signature gatherers, but our low cash situation forced us to organize a much larger volunteer-driven signature gathering operation than was typical even of grassroots BI campaigns with far more experience. *“The first piece of advice is **one should plan on using a combination of volunteer and paid- it’s very hard to do all one or the other.** A lot of grassroots campaigns will try to do all volunteer, and if you’re in a small town, perhaps it’s feasible with a lot of energy,”* explains Brent.⁴¹

Having had a rocky start, we were advised to only make public announcements regarding signature numbers when we had collected the first several thousand signatures and then only seldomly announce our actual numbers. This was to prevent our opposition from garnering too much information and not to make promises and then come out struggling; most importantly we wanted to keep up the positive energy with volunteers so instead of focusing on early numbers, we chose instead to announce the number of volunteers who had signed up to gather signatures.

“A very important decision we made was when we recognized that we were going to operate differently than a traditional campaign,” reflects Alan, *“[and instead rely on a new type of] model that combines a distributed [decentralized] structure with some centralization, which we then had to also figure out how to best manage.”* Paige had been used to the far more command and control structure of a typical campaign.

“[Our signature gathering campaign ran] more like a democracy, which was way harder to get stuff done, but a lot more meaningful, fun, inspiring.” -Paige Richardson

The BIPOC-led steering committee would still be making high level decisions, but the large volunteer team representing 16+ organizations coordinated the day-to-day signature gathering operation. With the lack of experience, minimal expert guidance, and semi-distributed structure, the volunteer team meetings felt particularly chaotic at first. While the steering committee was scrambling to search for and hire an experienced petition director, Lenny, who had no prior experience in signature collection, valiantly volunteered to serve as interim petition director to fill the void, with Brent for occasional remote guidance. The ultimately failed search for a

⁴¹ Brent explains: “A volunteer can get about six to ten signatures per hour if they are aggressive about it. Divide that by how many signatures you need and that gives you an idea of how many volunteer hours you would need.”

petition director, along with early fundraising struggles, did not help alleviate the overall sense of early campaign pandemonium.

But there was also a great deal of understanding and patience. Mark McCleod, a volunteer leader at both *350PDX* and *Oregon Sierra Club* recalls how “*staff as well as the most active volunteers embraced the campaign fully from the very beginning*. That’s very significant. I think we were all aware that it’s a very tough job to organize something like this on a tiny budget with people who are trying to find their way that had never done this before and no model to look to; creating our own model.” Gregory, a lead volunteer who played a key organizing role in the campaign’s signature gathering, “preferred having the decentralized model where the campaign would give us email templates and [organizations would each] send it out to our own volunteers.” Gregory had spent a great deal of time over the past years growing his organization’s volunteer base through developing one-on-one relationships and felt it was through these relationships that he would best be able to recruit, motivate and train his volunteers for the campaign.

Gregory liked working “together in teams and trying to encourage volunteers to recruit an additional five volunteers and train others to gather signatures with them. Most people just want to do their own gathering, so it was a big step.” As Gregory notes of *Oregon Sierra Club*, “We’re a base-building organization which felt like it was at odds with a central campaign model. At first, the campaign wanted to be able to access all the groups’ volunteer lists directly, but it was hard to swallow for many; when we held informational meetings and spoke about PCEF, it was hard for people to see that it was about the campaign rather than our organization. Getting that straight from the start would have been helpful. *We had to understand: It’s not the ‘I’, it’s the ‘WE’.*”

“One of the more important things is to build strong communication avenues in a distributed campaign structure such as ours,” observes Micah, “perhaps using an online platform such as *Slack* earlier in our campaign would have been helpful.” For Laura Stevens, an experienced organizer who was volunteering on the campaign, a lesson learned was to “*embrace the messiness -it was really messy- and let go of needing full control...*Our volunteers were highly engaged, which was a priority at the time. More volunteers were stepping in and were really fired up, more than ever before.”

Although there was agreement among many in the campaign that more structure would have been better, Simone Crowe, who was hired as dedicated staff midway through the campaign, expresses another commonly held observation that “*having a semi-decentralized structure was helpful in that it wasn’t this dominant hierarchical oppressive environment; our volunteer organizers felt very empowered and useful and followed the lead of frontline organizations*, and it really felt like we were all pulling together resources as best we could.” Martha Balshem, a volunteer lead with the *Portland NAACP* who oversaw the campaign’s data entry operation, similarly felt that despite the “free-wheeling” chaos that resembled the “wild west”, it was “worth every bit of disorganization at the beginning to have a horizontal structure to create the grassroots community. It was good not to have the early part of the campaign be top down. It seemed much more organic and based on friendships and relationships” than anything she had experienced before as a volunteer. Gregory also concludes that “despite all, I was super glad I

had the opportunity to participate and would do it again in a heartbeat. This is something that would make a real positive difference. Results speak for themselves.”

The *volunteer team eventually found its stride, dividing into five working groups: Training* (responsible for organizing signature gathering trainings for new volunteers, and scheduling ‘train the trainers’ sessions); *Communications* (responsible for coordinating with the campaign’s core Communications team to promote signature gathering opportunities at each of their



respective organizations); *Events* (responsible for researching, coordinating and organizing signature gathering opportunities outside of large events such as concerts, parades, sporting events or other events with long lines/captive audiences, and setting up and updating a website to help coordinate volunteers at upcoming events); *Data flow* (responsible for setting up systems for the gathering and storage of signature collection data, recruiting and training volunteers for database entry and internal signature verification); *Signature kit-making and volunteer event planning* (responsible for making sure to order and replenish print

materials for our kits from the union print shop we chose to use, organizing signature kit making parties when we would run low on kits and organizing volunteer appreciation events to keep volunteers energized).

One of the challenges of a semi-decentralized campaign was that we did not have a central list of volunteers from which to draw. Although the volunteer signature collection trainings were coordinated, each organization was responsible for recruiting and organizing volunteers from their own respective organizational lists. Filled out signature sheets collected at our headquarters would be marked according to the volunteer who collected them and their affiliation with one of the 16 organizations we were tracking (this allowed for some of the base building organizations to grow their lists after the campaign was over). Signature gathering kits were distributed (and tracked) to many of the coalition organizations located all across the city, which made it easier for volunteers to access.⁴²

The first staff hired for the campaign was a part-time office manager who helped organize our modest campaign headquarters and then, shortly thereafter, had to unexpectedly depart for

⁴² We also instituted specified “turn-in days” (we used Mondays, to capture large weekend events) where volunteers (or organizations) were regularly urged to turn in their filled signature sheets to our campaign headquarters each week, whether or not their signature sheets were complete. The reason for this was two-fold: we needed to keep close track of where we were at with our weekly goals and we wanted to minimize the risk of volunteers losing their sheets by hanging on to them for longer periods.

personal reasons. Lenny and I, with the help of a couple of other volunteers, filled in the void and took over staffing our campaign office headquarters in shifts so we could have someone there at all times to greet and assist volunteers with signature collection as well as making hundreds of calls to recruit new volunteers and check in on active volunteers. Lenny's relentless phone banking effort, spending countless hours on the phone daily contacting our *350PDX* list and other people from his networks, was remarkable. I helped recruit and track volunteers as they submitted their signature sheets and spent a significant amount of time thanking and appreciating volunteers individually, a task that was both rewarding as well as effective. Time and again I observed the unsurprising, yet notably consistent, fact that the volunteers who were explicitly appreciated would be the ones most motivated to keep returning for more. Volunteers, even the most prolific of them, would at times feel like they were underperforming. "Provide volunteers with reasonable expectations from the start on what they can accomplish" was a lesson learned for Micah. "Praise their efforts and make them feel like an important part of a successful larger effort." Alison Wiley, an *EcoFaith Recovery* lead volunteer who describes herself as a people person, similarly made sure that the volunteers she oversaw "felt really appreciated and loved, and they *were* loved. We were fostering a warm, inclusive culture that welcomed volunteers of all ethnicities, ages and backgrounds."

"One thing to watch out for is volunteer burnout," advises Brent. "Organize mid-way socials or parties as often as possible throughout the campaign. Have a specific volunteer coordinator to appreciate volunteers and give shout-outs." Although we did not have a specified volunteer coordinator, we did organize several informal parties outside our campaign headquarters with food, music, mingling and speakers featuring some of the campaign's organizers.

Micah, who played a pivotal role in coordinating signature gathering at large events, provides a few tips, including finding "large events where you're able to coordinate with the event organizers to get a couple of minutes at the mic and address the entire crowd" and targeting "folks that are stuck waiting in long lines, which are a great place to approach many people at the same time." Mark found working long lines helpful because people would "see the folks in front of them signing which had a positive influence" making it quicker and easier as one worked the line "or vice versa" he observed "if a couple people wouldn't sign, it would make it harder, so I would restart at a different section of line. Not spending too much time with unlikely signers and maintaining a positive friendly attitude, a warm smile, and playful humor helped make for a successful experience." However, Gregory observed that our campaign's "events were a hit or miss- just because there were a lot of people at an event, didn't always mean it would translate into a lot of signatures. But you had to just keep going." Micah found it helpful to think about the likely demographics at each event ahead of time "whether or not they were coming in large part from outside the jurisdiction, their political leanings etc. and be willing to adapt." Another strategy incorporated into Micah's trainings was having the volunteer craft and practice a pitch that "doesn't provide any space [for the potential signer] to refuse before you're done, just blow through the information and pitch without any pauses before they have the opportunity to respond, while remaining polite of course."

For Micah "one of the major lessons learned was to really take care in training volunteers. It was important to shadow and model my tactics to make sure that volunteers have a positive first experience. This led to much more productive and successful volunteers. I did not focus on that

early on, and volunteers would feel it was their fault.” He also experienced increased volunteer confidence “when they worked as a team and felt successful together, which we built into the training- this also helped increase retention of volunteers and kept them from feeling overwhelmed. Multiple sets of two proved to work best, for example four to six for larger events with long multiple lines.” Some prolific volunteers would be encouraged to pick their favorite local hotspots, such as popular weekend brunch joints, farmers markets or other locales where there was easy access to larger crowds of local residents. Most of the BIPOC organizations decided to target their own communities for signature gathering through culturally specific events and local restaurants.

Despite a slow and fitful start and despite a number of organizations that fell well short of their signature goals, other groups were eventually able to make up for this by meeting or surpassing their original commitments. 70% of the total number of signatures collected were by volunteers associated with just 6 groups: *350PDX*, *Oregon Sierra Club*, *Portland Audubon*, *EcoFaith Recovery*, *Climate Jobs and Verde*; with 122 of *350PDX*'s volunteers/activists having collected over a quarter of the total final tally with an average of 50-60 signatures each. There are many possible reasons for *350PDX*'s strong numbers, such as: having leadership fully dedicated and involved from early on in the pre-campaign meetings and therefore being one of the first organizations to commit to PCEF as a concept; being a base-building organization that empowers volunteer leadership and teams; having time for more early recruitment and leadership development with our volunteers/activists, some who began meeting well before the campaign's official launch; organizing several large informational events for our membership about PCEF featuring BIPOC leaders throughout the year-long lead up to the launch; Lenny's relentless internal outreach and recruitment efforts; continual volunteer appreciation; frequent communication about the campaign and calls to action with our email list and, arguably most importantly, the amazing cross-organizational collaboration that set up a coordinated infrastructure for the signature gathering operation. All of the groups whose volunteers/activists participated were involved in signature collection were essential to our collective success. All together the campaign's volunteers/activists collected 26K signatures in just 8 short weeks, more than twice exceeding our [original signature gathering plan](#) of 10K, and even our mid-way adjusted plan of 19K, a riveting experience and astounding feat according to veteran campaigners, even without taking into account our lack of prior experience.

Honest Collaborations: Paid Signature Gathering

In early June, in the heat of launching our signature collection operations and significantly behind on our early fundraising goals, we decided it would be of *mutual benefit to collaborate with another Portland BI campaign, Honest Elections*, a campaign finance reform initiative to limit candidate campaign contributions, expenditures and require certain funding disclosure. “For paid signature gathering, while you cannot pay per signature, you can still assume that you're going to be spending \$2 to 5 per signature for a paid collection effort. To get you ten thousand sigs takes \$2-5K” explains Brent. We estimated that we needed 35K paid signatures to meet our qualification goal, but we were scarce on campaign cash. The *Honest Elections* campaign had campaign cash, while our campaign had a resource they did not- a large base of volunteers. So *Honest Elections* cut us a deal to share the same paid signature gatherers which saved both campaigns a lot of money, and our volunteers would, in return, double carry their initiative together with ours. Carrying both initiatives had the disadvantages of needing to train

volunteers how to speak about two separate initiatives, which would in turn slow down the collection process. On the other hand, we found that *Honest Elections* was both easy to explain as well as being an easy sell on the streets- most people were quick to sign on to finance reform which they were more familiar with, and therefore assumed an alignment with progressive values, which in turn made many people more quick to sign on to our more unfamiliar PCEF initiative. We allowed each organization to decide whether or not they wanted to ask their volunteers to carry both and had put together both single and double signature kits for the office with mixed results, since only some of the organizations chose to carry both.

In retrospect, Paige sees that *“the partnership with Honest Elections was key for us because we were able to get signatures we could not afford to pay. They were splitting the cost with us, otherwise it would have cost two to three times the price. They also saved money.”* Brent, who helped oversee PCEF’s paid signature operation, advises to “partner with another campaign that you share the same values with. Unless you have a lot of money the largest signature collection agencies will cost too much. Look for upstarts with a good track record who can hire up and recruit people for your campaign and know your city and where the good collection spots are. The big signature collection houses that work for labor or industry measures, they are much more expensive but don’t necessarily do a better job. The big thing is to try to give yourself ample time, plan for there to be litigation, and treat the signature collection effort as the start of your volunteer campaign...Hiring paid signature gatherers also forces you to help find your donors earlier and raise money and getting your campaign ramped up.” We had calculated that the paid signature operation would need to gather ~5K signatures/week to meet our 7-week goal, and even this took some time to ramp up. A daily tally was done, with early numbers averaging at 2.8K/week, due to a combination of not having enough recruited paid signature gatherers (most worked less than 20 hours/week), underperformance, and a low validity rate. Our parallel fundraising effort would later allow us to further increase the number of paid signature gatherers and offer bonuses for increased hours to make up for our early shortfall.

Collaborating with another campaign also required some concerted coordination between the volunteer and paid signature gathering efforts. As Brent points out, “key things are making sure that you have a plan in place for conflicts (for example, if people showed up at the same place- does the volunteer leave or does the paid canvasser leave?), coordinate a calendar for events and have some areas, for example, buses or downtown areas, that are entirely ‘owned’ by paid canvassers. Have good communication between whoever is running the paid canvass and those overseeing volunteers.”



Image credit: Madison Rowley

Honest Elections were rightly confident they would win at the ballot if they managed to qualify, and although it was a cliff-hanger, both campaigns would end up successfully qualifying for the ballot, which may well not have happened without the partnership. Brent concludes that “most of what we did around signature collection went really well; we got a lot of signatures in a very short time.”

Security & Validation

Not yet having sufficient funds to pay for our own dedicated Voter Access Network (VAN), the *Oregon Sierra Club* allowed us access to their VAN for our campaign’s data entry and validation process and also organized trainings for our trainers on how to use it. Given the semi-decentralized structure, “there was a lot of fear around security,” recalls Simone, “and we should be safe, we were lucky enough not to get hacked.”⁴³

We were warned by our veteran guides, who have seen and heard it all in past campaigns, that there was a risk that our opposition would play dirty tricks with stacks of filled signature sheets stolen or lost late in the game. Securing our signature sheets was therefore deemed a high priority early on, spurring us to move the signature collection data entry and validation operation

⁴³ Our steering committee sought to increase our campaign’s security after the launch by reorganizing our meeting notes and documents and limiting permissions to folders on a need to know basis. For a while we even moved our more sensitive documents onto a more secure encrypted platform but it proved “too cumbersome” for working in a very fast-changing campaign with a decentralized structure, describes Simone, “and somewhat expensive.”

to an entirely separate location, a fifteen-minute bike ride away. For about five months the campaign's signature sheet locked storage and volunteer-run data entry and validation operation took up nearly half of 350PDX's entire office space. "It was an exciting place to be and became a hub, along with the campaign headquarters at the *Oregon Sierra Club* office" recalls Alison Wiley, an *EcoFaith Recovery* volunteer lead who worked together with Jane Stackhouse, a 350PDX lead volunteer, to oversee the data entry and signature validation arm of the campaign. "Trusted volunteers would frequently bike signature sheets between the two locations to ensure they were secure. Alison describes her role with Martha as being "a full-time job between both of us; I was pretty close to full time and we overlapped for at least four hours per day. You can't underestimate the sheer number of hours. It also took some time to set up new volunteers, to get them access to the VAN and train them, so volunteer retention was the key to efficiency. I tried to train several people at the same time, and held regular trainings twice a week, but also trained walk-ins. I would also train qualified volunteers on how to train new volunteers. Volunteers were plentiful. We always provided snacks. We were a productive, happy group." Alison shares how one of her "volunteers who had a full-time job and was volunteering for PCEF in the evenings, told me it was her therapy."

Our campaign needed to get a quick handle on our validation rates, particularly for the paid signature operation, so we could remain alerted to gatherers that had particularly low accuracy rates and make any adjustments as needed. Each signature gatherer would be asked to fill out a cover page for tracking purposes. At the bottom of the cover page was a chart for use by the validation office, with the total signature count, number of signatures sampled, number of valid signatures and % validity. Brent and Paige provided some initial guidance to Alison on how to more effectively manage the validation process, after her volunteer predecessor left on vacation midway through our campaign's signature collection phase, leaving Alison to take over a straggling validation operation. For example, Alison began instituting a sampling technique to check approximately 3 out of the 10 signatures on each sheet submitted by a particular signature gatherer, and if they had a high validation (~80-90%) then they would apply the same validation rate to the other sheets submitted by that person." "Alison began whipping us into shape" recalls Martha "which actually led to a positive shift mood-wise." "There were always about five volunteers doing this at a time daily," recalls Simone. "We did more validation checks for the paid gatherers because their accuracy wasn't as high, at about 60%, in comparison with the average 80% accuracy rate for volunteers."⁴⁴ Even at our most efficient, we would be able to sample only 10-20% of the approximately 60,000 signatures we collected. After catching up, we went through most of the sheets again to check more of them." Martha recalls the "excitement when it seemed like we were heading toward a slam dunk- our confidence and resolve only grew."

⁴⁴ "The sampling technique allowed the team to get through many more signature sheets in the short amount of time we had" explains Alison. "It took a trained volunteer an average of 1.3 minutes to validate whether a given signature in the VAN belonged to a registered Portland voter with matching address. But there was a lot of 'time overhead' for volunteer outreach and recruitment, training, paper shuffling, breaks etc."



Celebration of reaching 61,000 signatures

When I announced to our core coalition that *we had reached our adjusted goal of 45K petition signatures collected with three weeks to go*, there was palpable excitement all around at this landmark moment. Alan, who had always believed we could pull it off and kept pushing hard on the core groups to give it our all, was so thrilled that in a rare break from his otherwise collected demeanor, he leaped out of his chair and took a victory lap around the room high-fiving everyone.



Press conference in front of City Hall

Photo credit: ©Rick Rappaport 2018

In the final days before submitting our signatures sheets to the City, Alison remembers the “big project where we photocopied all of the sheets, labeled the boxes, separated by organization and paid versus volunteer, and then numbered all the sheets.” On July 6th, 2018 we submitted 26K volunteer signatures, together with the nearly 35K of our paid signature gatherers, to *submit a*

total of 61,728 signatures. Our Communications team organized a press conference in front of City Hall to announce this campaign milestone with BIPOC speakers, including co-chief petitioner E.D. Mondainé, and about 60 people with banners in a diverse display of people power. Alan remembers with pride the moment “we turned in signatures and there was a great photo taken on the steps outside city hall that depicted our environmental movement that didn’t look anything like the environmental movement even a few years ago. That was great.”

In the month of July, while waiting for the City to complete its verification process, we were advised by Paige to keep up the momentum as much as possible in the period following signature gathering. She came to the volunteer team meeting to express her deep sense of gratitude and inspiration -how she had never been part of such an inspiring campaign in all her years- in a display of genuine emotion and passion that was felt and appreciated by all. She also made a plea for the team to not let up on the energy, given we were just 17 weeks out from election day, a very short time to secure 10K votes per week. But so many leads, both volunteers and in-kind staff, had given their absolute all so, as Alison describes it, “the attitude that there is no pause...did not work for many volunteers, some of whom needed to take a break.” “After we got all the signatures in, I was completely burned out,” remembers Gregory. “I went from a 60 hour per week commitment to 10 hours per week.” Alison further reflects that “it would have been helpful [for volunteer leaders] to have been provided an up-front project planning overview that included all the phases of the campaign so that we could be informed about what we had to do at each stage and try and pace ourselves.”

Alison and Martha co-led a team of volunteers that was, in fact, extremely active during the summer: the data entry team. The data from our signature sheet copies had to be entered into our database before launching the next field phase of our campaign. “I had been doing signature collection and validation” Martha recalls, but “then needed to find a role for myself that I was capable of doing since my physical capabilities were limited at the time” and saw data entry as a good fit, but “had no intention of being in charge of anything. I really wanted a partner for the sheer mass of work that needed to be done. I thought I would be in over my head if I did this alone and asked a bunch of people but couldn’t find anyone else.” Alison was aware of Martha’s initial anxiety and affectionately remembers how she nevertheless “took over [data entry] when my husband was in the hospital,” an act of kindness reflective of the sense of community that was felt within our campaign, where people would bend over backwards to help cover for those that needed time off throughout the campaign. “Alison calculated how many people we had, how long we had etc. and estimated that we could get them done by Labor Day” remembers Martha “We had to let people take them home in order to get it done. Volunteers, especially those with full time jobs or complex schedules, loved to be able to take work home, which worked just fine for data entry.” Martha recalls how she “really loved” overseeing her team of “about 20 regular volunteers for data entry between the 4th of July when petitions were submitted through Labor Day, with another 10 who sporadically showed up to help...We kept the office open for as much time as we could from 10am-8pm. One reason we succeeded with our data entry is that volunteers were told they shouldn’t burn themselves out and were given a lot of love,” adding with a sense of pride that “someone with experience [at the County] told us she had never seen that much data entry done as quickly as with our campaign.”

Tough Transitions: Preparing for the Next Phase of the Campaign

Although the volunteer data entry team ultimately succeeded in its goal, Martha echoes the recollection of many when she describes how, in the roughly two month transition between the signature gathering phase and the next phase of the field campaign, there was a fair bit of confusion and additional chaos, in part because “it was hard to figure out who was in charge”, a challenge associated with the more decentralized campaign structure we had adopted in the first phase. “There were a lot of shifting roles and confusion around who was owning what” similarly remembers Simone “and people were in and out of town. A lot of the key people who had pulled for signature gathering were all away for much of the summer for different reasons. In retrospect, we should have really focused more on fundraising, setting up our VAN, and having a strong plan for later in the summer. It felt chaotic and frustrating, but was a natural, necessary part of the campaign to regroup.” Simone describes the turmoil of having had three different consecutive supervisors in a period of three months, none of whom had given her direction that was consistent with the previous one. “By not having a single decision-maker we would have many discussions which was good in that we were learning a lot together, but it was challenging” reflects Simone on the tension between “needing more structure earlier on” while also wanting to “empower volunteers to take the lead on things.”

Alan recalls of the summer transition: “It was mostly about figuring things out, most of us had no idea about volunteer management or how to use VAN [for the persuasion/*GOTV* phase] or any of that stuff.” In addition, whatever funds the campaign managed to raise during signature gathering had largely been spent on paid signature gatherers, thus leaving our campaign with *a continued shortage of cash and so “with respect to hiring, our default was that if we don’t absolutely need to hire someone, then don’t.”*

On July 27th, the City, after completing their sampling verification process, officially declared that PCEF had qualified for the ballot with 39,755 valid signatures. “It was good we had all the extras” notes Simone, given that the City calculated a 64% overall validation rate, a rate that was significantly lower than the one we used to set our original goal. If we had collected just 10K volunteer signatures, as in our original plan, along with the 35K paid signatures, we may not have qualified.⁴⁵ “They were pretty shocked about what we did,” says Jo Ann of our opposition, explaining that it was “because [the PCEF campaign] was *talking to people very early on and built the base while building the infrastructure-* that was a key learning.”

Shifting Structure for ID/Persuasion/*GOTV* Campaign Phase 2: Receptivity & Flexibility

A sluggish and rough summer transition had resulted in a reduced volunteer field operation managing to gather 1.7K signed voter pledge cards in about two months’ time, far short of the original goal of ~50K, which Simone, after conferring with experienced field campaigners, later realized “wasn’t realistic.” The original goal number, explains Simone, “had been based on the signature gathering phase, which is a different beast than collecting pledges. People are more

⁴⁵ We would have needed a minimum of 54K signatures, with at least 19K from volunteers -probably more- since as Paige notes “the quality was a lot higher with volunteers” and concluding that it was crystal clear that “we absolutely needed both paid and volunteer [signature gatherers].”

willing to sign on to putting a measure on the ballot than willing to say they will definitely vote for it. There was also a strong sense of urgency with signature gathering to be able to get on the ballot; gathering pledges is a heavier lift for volunteers to rally behind. The pledges also weren't targeted because [I had been advised] that basing it off of what our volunteers were used to from the signature gathering phase was the best strategy for keeping their momentum up. In retrospect, I would have gotten set up on VAN and done a more targeted approach earlier."

In early August several volunteers and staff alike were frustrated at the perceived disorganization and sought more transparency around decision-making. This led to the steering committee's resolve to make some significant shifts by the end of the summer which would prove pivotal. One such shift stemmed from the recognition that *the second phase of the campaign required us to transition to a more top-down structure*. "The process-heavy coalition approach to managing campaign staff didn't work," recalls Lenny. "No one was in charge or able to make quick decisions." Alan, in his intrepid nature, was able and willing to step up to take on the still vacant role of campaign manager, working closely with Paige. "It feels good when people and organizations you respect want you to serve a key role in something that is so important to all of us," recalls Alan of taking on this responsibility. Paige recalls how "it was great to have Alan as manager. He was calm, steady and an experienced project manager. Alan and I usually agreed." He had also already taken on the roles of leading the fundraising committee and the strategic planning processes, among other roles, so it felt like a natural choice, but *formalizing the role of campaign manager proved essential to reducing confusion and chaos and creating clarity and organization across the campaign*.

Alan had also recently completed a gradual transition of his longtime position as Executive Director of *Verde* over to Tony, who himself had been very engaged in the campaign as a spokesperson as well as with fundraising and coalition building, and this gave Alan the necessary capacity to take on this intensive of a role. At around the same time in early August we created an *executive committee that was empowered by the steering committee to make rapid response* on daily campaign matters, from endorsements, staffing, major contracts, budget and other high-level decisions. The executive committee would meet twice a week and was comprised of leads for the various campaign teams: Jenny and Damon as co-leads for communications; Lenny for political strategy and endorsements; Khanh and myself for media events and actions; and Alan for fundraising and overall campaign management, with Paige as guide. The executive committee worked closely with the other steering members and in-kind staff on teams and many of us would serve on multiple teams, as needed. At this point the stakes were higher than ever and the campaign had minimal financial resources to hire experienced staff. The executive committee and most of the steering committee members would serve as in-kind staff donated to the campaign by each of the steering organizations and committed most, if not all, of their time to the campaign through Election Day. The in-kind staff would serve many of the functions that a typical campaign would have hired experienced campaign staffers for.

The challenge was that we would be *continuing to build our bicycle as we rode it*, a daunting feat, but one we also knew would build our core coalitions' campaign skills and political power in a manner that no amount of training could accomplish. Simone notes how "in the fall we had more leadership on each of the teams with better coordination, and we started functioning better." Paige reflects how there was "so much loaned staff and none of the staff had ever done it

before. There is no way in hell I would have thought that was possible a year ago. When I first said yes to Brent, I didn't realize that the campaign would not have a single experienced campaign staffer until a year later, but the issue and community made me think it was worth trying anyway. In some ways the beginner mind is a wonderful thing because you don't know what you can't do."

Another pivotal decision proved to be that, as Alan puts it, "we finally figured out that we had to hire an experienced field director." Once the campaign hired a field director, Alan led management team meetings, together with Paige, that included the leads of the key arms of our campaign- field, communications, political strategy/endorsements and fundraising- and that would provide daily high-level updates and evaluation and help facilitate coordination across the teams.

It was in the final two months that Khanh and Simone set our campaign up to use *Slack* as our instant messaging platform, allowing lead volunteers and staff alike to communicate, with varying permissions, over 14K messages across thirty some channels, which is something "we should have set up earlier," notes Simone. The platform allowed the various campaign teams to start new channels of communication with each new project, event or action, thereby greatly facilitating the internal cross-communication of a campaign that relied so heavily on its myriad of lead volunteers and in-kind staff.

It would take 30 days from the time of certification before we received a measure number: a period in which, as the City announced, the "Council may adopt the petition by non-emergency ordinance." On August 29, 2018, the City announced that the "Council does not adopt petition and the measure is certified to the Nov. 6, 2018 ballot. *Multnomah County Elections Division* assigns [the *Portland Clean Energy and Community Benefits Initiative*] measure number 26-201."

Not a Moment Too Soon: Hiring of Field Director

On August 30th, with only 14 short weeks to go until Election Day, our campaign hired Jessica Beckett, an experienced campaign professional, to be PCEF's Field Director, a position in which she would become the campaign's primary interface with our volunteer leaders. "We put a big preference on hiring POC staff," recalls Paige, "but it was challenging because we didn't have money to hire until very late and most of the experienced campaign staff were already hired in one of the busiest election cycles nationally, so we had to search all over before finding Jessica through our coalition network," adding that "Jessica did an excellent job and was a great team leader." This was seen by most as a critical move which could not have come too soon. As Micah also points out, "it would have helped to have the systems set up and the canvassing be more data driven" from the start, something that Jessica immediately prioritized and implemented. Martha notes how "it would have been invaluable to have Jessica earlier, at least in the transition between signature gathering and the rest of the campaign," expounding on how it would have greatly facilitated the data entry set up for the later switch over to using *My Campaign* for phone banking and canvassing "hiring Jessica 4-6 weeks earlier would have been ideal. There should be a fund created for grassroots progressive campaigns to be able to hire a 'Jessica' from the get-go."

One volunteer recalls how “when Jessica came in, the volunteer team became completely top down” which volunteers viewed as having both upsides and downsides, and which Jessica herself saw as the “necessary hierarchical structure of campaign where everything moves so quickly; unless there are point people to make quick calls, things will move too slowly.” Most echoed Martha’s view that, given the major constraints our campaign had to work within, the success of our campaign “took both the horizontal nature of the first phase and the more strategic top-down nature of the second phase.” Mark, who became one of our campaign’s most prolific canvassers, remembers how for him as a volunteer “up until [Jessica was hired] it felt like the blind leading the blind, which wasn’t necessarily a bad thing, but it didn’t really become very organized until Jessica came with her personality, knowledge, experience and POC perspective. I remember the first volunteer team meeting that [Jessica] came to when I didn’t know who she was- she took over and ran the meeting in an extremely efficient high energy way and people sensed that there was someone there who knew what she was talking about and things started to happen...*It was as if life was breathed into the campaign.*” Gregory similarly reflects on how “one thing we did really right was hire Jessica because she knew how to run a GOTV. She was a real tiger and knew what she was doing.”

Jessica reflects that the “field campaign should have started earlier with a full field staff, and data collection system and metrics in place”. She also would have “loved to have hiring authority” for her field staff from the get-go “which didn’t happen for another two weeks.” But nevertheless, as



Gregory put it “things picked up as soon as Jessica came on board.” Soon after Jessica led a field team of two full time staff paid by the campaign, two full time staff partly paid by their organizations and partly by the campaign, and four regular in-kind staff. Jessica appreciates that the campaign gave her the opportunity “to lead, especially as a woman of color.”

Although the field campaign became much more hierarchical once Jessica was hired, something typical of most field campaigns, it still had many facets that differed from the traditional model.

Diversifying the Landscape of Campaigning

One important example of how our campaign differed from a traditional model was that *we put a great deal of “energy into voters typically ignored in racially and ethnically diverse neighborhoods with lower voter turnout*, such as those east of 82nd Ave,” explains Jessica, describing how although we did hit our strong progressive voter base early on, we also surmised that this base would also be targeted and encouraged to vote by a lot of other progressive campaigns.



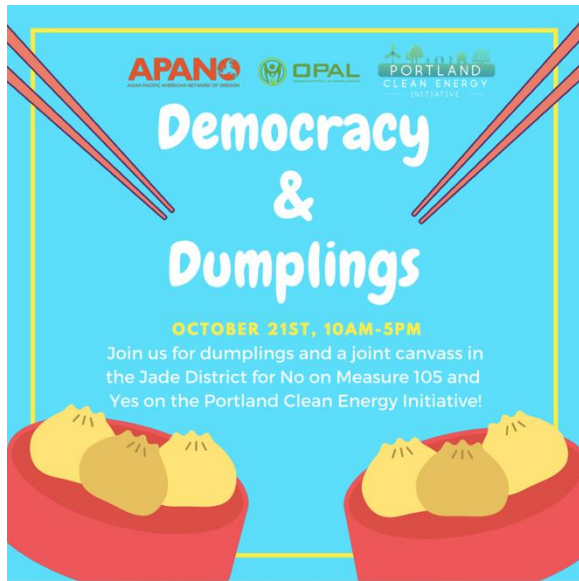
The focus on the more diverse lower-income outer areas of Portland was closely aligned with the values of our campaign and was something we had discussed nearly a year earlier as an important goal of our campaign, on a par with our goal of winning at the ballot. Jessica coordinated many of the canvasses closely with the BIPOC steering organizations and incorporated special volunteer trainings by culturally specific organizations, campaign material translation into several of the most frequently spoken foreign languages in these neighborhoods and tracking non-native speakers in MiniVAN⁴⁶. I remember, on numerous occasions, how rewarding it was to observe the complete change in expression on a non-English speaking voter's face after handing them a pamphlet in their native language. Many non-native English speakers would get follow-up visits to make sure that anyone with language barriers would receive information in their native language and, where possible, from someone in our campaign who speaks their native language. It also meant a great deal to Jessica that our campaign "took the time and energy to translate our materials into many different languages and asked white allies to go into areas they wouldn't normally go to. The level of gratitude we experienced from non-native speakers gives more than lip service to engaging frontline communities."

⁴⁶ MiniVAN is a mobile canvassing application that allows campaigns to contact voters and supporters, collect data and sync the information back into the VAN (Voter Access Network) in real time. Canvassers can download the application onto their own phones.



The Portland Power Squad

Several of these canvasses were hosted out of the offices of core coalition organizations based east of 82nd Ave and would always include an element of fun and culturally-specific food for



volunteers and were given creative names such as *Democracy & Dumplings* (hosted by APANO), *Caramel apples, Cider and Canvassing* with CCC (hosted by the *Coalition of Communities of Color*), *Canvas de la soul* (with soul food; canvas hosted by *Portland NAACP* out of a historically Black congregation in North Portland) and *Pan Dulce por Poder/for Power* (hosted by OPAL). The steering committee’s predominantly white environmental organizations also hosted at least one large canvass event, such as the *Swift Action Canvass* (hosted by *Portland Audubon* at a viewing location where a dancing hoard of migrating Swift birds dove in and out of a school chimney). Members of the Executive and Steering Committee also participated in most of the weekend canvasses.

For the first part of the campaign “most of the volunteers were white, but it was still nice to know and actually feel that you’re involved in a collaboration with communities of color” recalls Mark in reference to the hosting of canvasses out of BIPOC organizations in more diverse neighborhoods. This drew and motivated volunteers like him to show up regularly, as manifested by the 100+volunteer turnout at BIPOC-hosted canvasses. Mark also observed how this also gradually changed the volunteer demographic: “toward the last 4-8 weeks there were a fair number of POC volunteers from minority communities playing an active role in canvassing.”



PCEF leaders and supporters with signature gathering kits

Synergistic Collaboration: Working with Other BI Campaigns

Another feature of our campaign that Jessica describes as *“unusual” was the degree of our collaboration with other campaigns*. In the second phase of our campaign we partnered with the *No on 105* campaign, which was fighting to defeat a statewide ballot measure that, if passed by voters, would repeal Oregon’s 30-year old landmark sanctuary law, the first of its kind to be passed in the nation. Preserving Oregon’s sanctuary law, which forbids state and local police agencies from using public resources for racial profiling, from the hate groups (as they were defined by the *Southern Poverty Law Center*) behind the measure to repeal, was felt with particular gravity by our BIPOC core coalition members whose constituents would be the likely targets of racial profiling. “At first there were some fears about volunteers being taken away from us and resources being too distributed,” remembers Simone about the early volunteer team discussion on our campaign’s decision to closely partner with another campaign, “but it just brought in more people. It just lifted everybody up.” Jenny describes the fight against measure 105 as “an existential threat against communities of color” and the partnerships that were developed across campaigns to defeat the measure as *“helping build movement solidarity.”* The predominantly white grassroots environmental groups in the core coalition also felt this was an important partnership, not only out of solidarity with our BIPOC coalition allies, but also because for some of our groups it was an *opportunity to educate our own membership on the connections between the climate crisis, forced migration and immigration policy- a core element of the fight for climate justice.*



Joint canvass hosted by APANO and OPAL

The strategy to partner with other campaigns was to try to get voters to vote all the way down ticket and link PCEF with other positive progressive campaigns and against regressive campaigns. Our partnership with the *No on 105* campaign included joint canvasses as well as having the PCEF campaign include *No on 105* trainings and materials at all of our PCEF canvas events. Similar to observations of our signature gathering partnership with *Honest Election*, it seemed to have a synergistic effect when canvassers would begin with the *No on 105* pitch, which voters -particularly in the more diverse neighborhoods- often immediately resonated with. Voters would then often appear to be more receptive to our PCEF campaign message. In addition, it flowed well to begin with stopping something negative (measure 105), followed by putting forward a positive vision (PCEF). This collaboration, observes Jessica, “was great for both campaigns.” Our ability to draw very large numbers of volunteers to canvasses led other campaigns to “ask us for joint canvasses,” which Jessica notes at the time was a “good indicator.”

In addition to our own and our joint *NO on 105* targeted lit drops, we also partnered with the *Honest Elections* campaign once again for dual campaign lit drops. Paige also managed to persuade *Our Oregon*, a coalition of sixty organizations run by labor groups including *SEIU 503* and *49, AFSCME 75 and OEA*, to include us in their voter guide for an affordable price, which she describes as “a massive in-kind contribution to us- one-hundred-and-fifty thousand households, practically every voter in Portland, got the two guides that we were in.”

A New Kind of Canvassing: Neighbor-to-Neighbor

Another unique feature of our field campaign was the “ability to be nimble,” explains Jessica, an example being our unique neighbor-to-neighbor canvassing. Jessica recalls how, when some of the volunteers had first asked her whether they could canvass their own respective neighborhoods, she had at first strongly resisted the major logistical lift and huge time drain that she anticipated it would become. Cutting the individual turf required for a neighbor-to-neighbor canvass, which she describes as one of the biggest challenges she took on in running the field campaign, was not something Jessica had ever done or heard of before in typical campaigns. Although reluctant at first, she came to see how this unique approach was in line with and served by the grassroots ethic of our campaign.

To incorporate this new type of canvassing, Jessica had to “develop a system to track it using the database and spreadsheets -which we didn’t always get right- and which took much thought and time to set up. We needed to have sufficient staff and build it into the plan up front, set up additional trainings and require volunteers to return their data the same day to keep up with the pace of the campaign.” At 11pm every night Jessica would update our lists, using data from the Secretary of State’s office, removing those who had already voted. A number of volunteers canvassing in their neighborhoods reported that their existing relationships, as well as being able to introduce themselves as a neighbor at the door, made it both a more enjoyable and a more successful experience. “*When I covered the immediate area I lived in and introduced myself as a neighbor- it seemed to make a difference,*” recalls Mark, one of our campaign’s most productive volunteer canvassers, “and if they recognized me they were even more likely to give me attention and be quicker to support,” adding that “it probably helps to decide that you’re going to do this for 1-2 hours a day, several times a week, so it becomes a routine part of your life through the campaign period. It needs to be embraced with positive energy.” *For all the additional work it entailed, Jessica was happily surprised that, in the end, the extra effort was “absolutely worth the results.* It was one of the things that made PCEF unique and also created wins for us in areas that wouldn’t otherwise have been possible- for example in very diverse neighborhoods where neighbor-to-neighbor relationships made the difference and/or areas that were otherwise not considered ‘canvassable’ because of the difficult distribution of houses.”

Campaign with a Heart

Another aspect that differentiated the PCEF campaign from other campaigns Jessica had worked



on was that both the organizations and “volunteers really stepped up.” “Both *Oregon Sierra Club* and *350PDX* really came through” for the field team recalls Jessica “even though they had a very small staff. *Oregon Sierra Club* hired a temporary field person, Colin, who was just on it and eager to learn; he saw the need and stepped up. So I devoted more time to skill-sharing. Then they added Dineen. *350PDX* also hired a temporary field staff person dedicated to the campaign and developed a whole team.”

There were also countless examples of volunteers stepping up. Alison, who later regularly volunteered as a canvasser, recalls how she “loved canvassing and found it more joyful than signature gathering because you were going to doors where most people were positive, or at worst neutral. *I also loved the cross-generational nature of our campaign- a lot of Millennials and baby boomers.*” Jessica explains *that the most effective way to recruit and maintain volunteers is to “start with love, let them know that without them our campaign has nothing, and express this constantly.* Time means more than money, so utilize volunteer time well and explain the strategy to them, rather than treating them like a cog as many campaigns do. Give thought to the physical space- make them feel good as soon as they walk in by immediately shifting the frequency way down when speaking to a volunteer, and then gradually bring them closer to your rate. Say thank you *all* the time.” One of the volunteers, an immigrant from Zimbabwe, spoke of how she loved the experience of participating in such a positive campaign, which was a first for her. Jessica similarly recalls how her “mother said that this was the first campaign she ever liked.” “It felt so good to work in a campaign with so much love,” reflects Jessica. “Love is not really a thing you usually find within a campaign.”

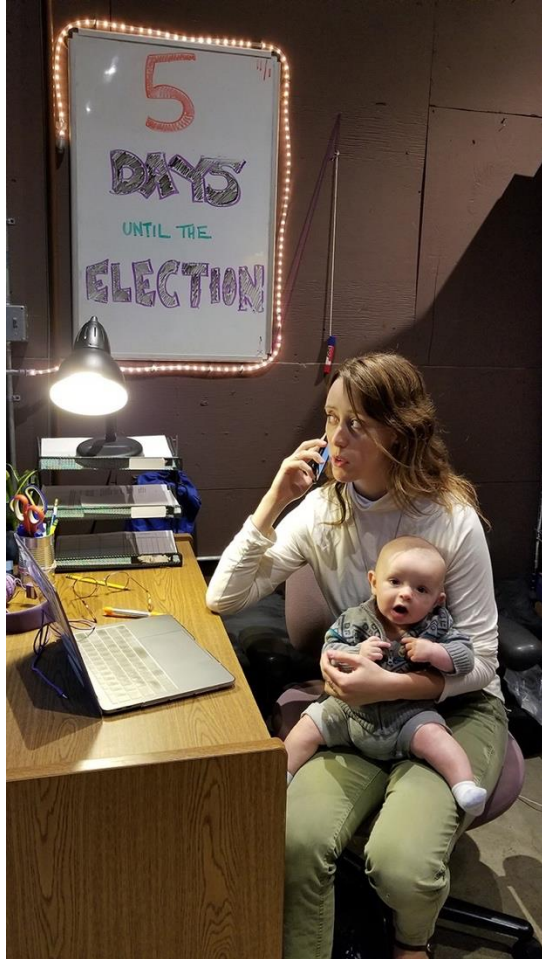
“The cooperation of the coalition in general was very good” recalls E.D. “the campaign had a real heart; it was different from most other campaigns in this. There was a lot of ‘we’re a family’ atmosphere and allowing it to become part of us.”



Lessons Learned from the Field

Earlier Set Up of Systems

Simone, who supported the coordination of the field team, echoes the voice of many, when she views one of the biggest lessons learned for the field campaign was that *“hiring more field staff earlier would have been ideal. Hiring Jessica earlier would have been better”* describing how “Jessica brought her experience, confidence, best practices and direction over organizers. It would have been better to be on *MyCampaign* (the volunteer management program of VAN) from the beginning, ideally for all of signature gathering, and not mess around with [the database



management system] *NationBuilder*, and not have to change systems and transfer data between systems which was a heavy lift, although limited campaign resources may not have allowed for that at the time.” Other related lessons learned include the “need [for] a good data team to keep track,” advises Gregory. “VAN is tricky and cumbersome and requires training and you really need enough people to be able to run VAN in order to run a campaign. So organize for VAN training early and often. It’s particularly important for creating good lists for phone banks.” It was also a best practice to “have regular standing times for canvass and phone banking events each week,” notes Jessica, which allowed us to promote them more easily and for volunteers to plan for it.

Earlier Staffing & Expectations

Simone, who was staffing a campaign for the first time, felt there should have been “more realistic expectations of staff organizers; it’s a lot for a campaign to expect organizers to work 9am-11pm 6-7 days a week for most of mid-September through the [November] election,” something that is typical in the boom-and-bust cycle of the campaign world. “Once we got the ball rolling we did an amazing job with phone banking and door knocking, recognizing

that we had a lot more volunteers than most campaigns” recalls Simone.

Prioritize Canvassing

The final numbers for our campaign appear to corroborate Jessica’s experience from past campaigns that it is better to “put more energy into canvassing than phone banking, which is much more effective.” Simone recalls how “we did persuasion right through the *GOTV* period



since *GOTV* is such a long period of time in Oregon due to its vote by mail system.” In response to what she would have done differently or improved upon, Jessica mentions, among other things, “if I could have started earlier then, strategically, I would have lengthened the neighbor-to-neighbor canvass period” and held more “Spanish speaking phone banks” and “implicit bias training with volunteers.” As a self-described data-driven person, she also “would have spent more time and been more strategic about keeping up with the latest tech and field research” and begin earlier in “targeting specific demographics based on our polling, for example women over fifty years of age and everyone under 40, in a very tailored approach to increase effectiveness.”

Tapping Coalition Resources

“Every steering organization contributed to field, for example *350PDX*’s volunteer base really stepped up,” recalls Jessica. “However, we could have tapped our PCEF endorsers and larger coalition a lot more than we did, to request that they call their own members.” “I would have spent more time explaining the nature of the shift [from a decentralized to a more centralized model]” reflects Jessica. “Once I shared the field plan with volunteers and approached it with honor, respect and love, it drew volunteers back in.” Regarding the steering organizations, Jessica advises to “set up expectations from the start: either they commit to calling into their base, or if they can’t do so, then they need to allow the field team to make the calls.” Simone recalls the initial “confusion around organizations giving their lists over to the campaign for us to organize their volunteers, which was a bit of a hang-up.” The discussion and resulting MOU that was crafted by the coalition to clarify agreement on how the campaign could and could not use each steering organization’s data both during and after the campaign, should have happened as soon as it was decided to transition our campaign to a more centralized structure. In the final months of the campaign all the steering committee organizations were strongly encouraged to sign some form of the MOU that was acceptable for their organization and that allowed for temporary list sharing through Election Day.

Texting

“Text banking was built into the GOTV plan to target younger voters, especially closer to Election Day,” explains Jessica. “We did use some peer-to-peer texting using [Hustle](#), which one of our more well-resourced larger coalition allies paid for since it was very expensive at approximately 7 cents per text” explains Simone, “but we mostly used code written by Jessica’s friend that was cheaper to use at less than 1 cent per text, a lot less than most software used for this purpose. We put it up and made it public on [GitHub](#) so other groups can recreate this.”

Simone also “used *NationBuilder* a bit for texting for volunteer recruitment; it has an app that allows you to text your whole list that they can reply to; or text days of action, such as the ones that *350PDX* and *OPAL* organized, where volunteers could text a number to sign up.” The encrypted texting app [Signal](#) was used for communicating with key volunteers and staff, explains Simone.

Visibility & the Lawn Sign Conundrum

There were differing opinions among our expert advisors regarding the importance of placing lawn signs. Jessica maintains that “the research shows that regular lawn signs are not that effective -except very large handmade ones- and are very expensive. If someone won’t canvass or phonebank, then make them king of lawn signs.” Micah stepped up to coordinate the lawn



Photo credit: Madison Rowley

signs with the help of a handful of volunteers, so that the field team did not have to expend any of their energy on it. Sign placement was focused on consenting people’s homes in high-traffic corridors and at high visibility intersections through targeted lawn sign canvasses; signs would also pop up at freeway entrances and exits, traffic

islands etc. Although we had no way to evaluate the effectiveness of the over one thousand signs that were placed, anecdotally many volunteers and supporters reportedly expressed their excitement at seeing our signs all over the city, viewing it as a sign of the popularity and momentum of our campaign.



Creative signage on the water

Creative Non-Lawn Signage

In addition to traditional lawn signs and other campaign paraphernalia, such as stickers and buttons, we also had other creative forms of campaign signage. We successfully distributed and asked our larger coalition, particularly businesses and faith communities, to put up one of our 500 colorfully designed campaign posters to prominently display their support for PCEF. Two weeks prior to election day, volunteers also organized the crafting and placement of numerous giant bright [colored hand-painted wooden placards](#) that were fastened to the back of their cars or pick-up trucks parked at the curbs of visible high traffic corners. These signs even garnered mention in a mainstream press story in the run-up to the election. In the final week scores of volunteers held up giant banners and signs, balloons and other bold visuals on our city's bridges during morning rush hour. In another creative display, two activists known locally for their light projections, created and organized small groups of volunteers to set up projections for our campaign. In the final weeks of the campaign, the light projections would appear almost every evening in various strategic locations, such as messages to vote for our measure projected onto major freeway overpasses during rush hour, messages calling out our corporate opposition projected onto their downtown office buildings, and messages promoting our campaign translated into languages such as Spanish, Vietnamese or Chinese projected, with permission,

onto buildings in neighborhoods where these respective languages are widely spoken. In response to asking what his favorite part of the campaign was, Alan -who had participated in some of the light projection actions in the final two weeks- reflects how he “enjoyed the light projections the most. Those were great. They were my favorite thing.”



“1% from the 1%” light projection onto downtown Portland headquarters of The Standard, one of the billion-dollar corporations funding PCEF’s opposition



More creative signage for PCEF measure 26-201

Field Campaign by the Numbers

Jessica came into our campaign with high aims for what could be achieved in the short amount of time, but even so “nothing fell short” she says of the final numbers. “The number of doors knocked wildly beat our expectations.” Our campaign made close to 60K contacts with voters through signature collection, pledge cards, canvassing and phone banking and delivered over 500K mailers (breakdown in [Appendix B](#)).

In mid-September we received poll results that showed our measure at 58% Yes (with 40% strong Yes), 28% No, 14% Undecided. This remained relatively unchanged from our poll five months prior and was a strong place to start from, but it was before our powerful opposition had placed a single ad, which we knew was coming. Just 7 weeks after launching our persuasion/GOTV field campaign, and after facing off with our opposition in a heated media battle, we managed to pull off a resounding victory with a 65% Yes vote, winning 73 of 81 Portland precincts.⁴⁷ This was such a slam-dunk result that it was announced in the media only moments after the polls had closed. “We are absolutely thrilled with this resounding victory,” Jenny Lee was quoted by *Oregon Public Broadcasting (OPB)* as stating on election night. “That really speaks to a new era of an inclusive politics in Portland.” Jessica noted another indicator of the campaign’s success was our overall number of voters: “Despite being at the bottom of every ballot, we received a larger number of votes than the measure immediately above us. Frankly, I have never seen that happen in 13 years of campaign work. It’s a testament to our volunteers and our relentless effort to educate voters outside of the scope of more traditional campaigns.” Alison recalls election night as “exhilarating, one of the happiest nights of my life. We’d formed a green/black/brown coalition, which was groundbreaking. And we won, *together*.”

Communications

Despite a rocky start, “once the ball was rolling, every day was like a week. The pace was so incredibly fast and decisions had to be made very quickly,” recalls Cary of being on the Communications team, noting the “amazing capacity building” and skills gained for the Communications team in all of its roles and responsibilities ([see Appendix F for list of roles](#)), that came together with “the opportunity to elevate the public discourse” in the mainstream media.

Communications Roles & Management

The role of communications “morphed over time” remembers Damon, whose first time it was working on a political campaign and who, in the first part of the campaign, took on “every communications related thing; before filing the [petitions] this was minimal: I worked a little with a graphic designer to get our logo and branding - it’s important to align with your campaign vision early on; I worked with a volunteer website designer to help set up the website and helped manage it and train our volunteer field team on how to use it for volunteer engagement.” “Other organizations had representatives on the communications team that had expertise, but did not

⁴⁷ Mid-Term 2018 November Portland election numbers: Eligible voters 531K (72% turnout); 309K voted on PCEF out of the 385K total votes cast, in one of the highest rates of down-ballot voting in the 2018 local election; Yes- 201K (65%); No- 107K (35%)

have as much capacity as I did,” describes Damon, who was grateful for Paige’s expert guidance in “reviewing materials, creating content, language for petition gatherers etc. based on polling data that was very helpful in targeting our messaging to specific audiences.”

“Communications for a while was our weakest spot- we were piecing it together and weren’t super strategic about deploying our resources, including spokespeople, early on,” recalls Tony, noting the increased anxiety level at times due to not having an experienced Communications Director, something our campaign was not able to afford and a central role in any campaign.

Jenny, who had joined the campaign shortly after the petition had been filed -replacing Maggie as CCC’s representative on the steering committee- *stepped up to serve as the campaign’s in-kind Communications Director* in the fall. Although Jenny had some experience working on legislative campaigns, managing social media accounts and drafting campaign pamphlets, she had never worked on an electoral campaign before and had no prior experience doing many of the tasks she was charged with in her role for the PCEF campaign, such as “*working with a communications consultant, writing voter pamphlet statements, understanding all the different kinds of media and difference between different media outlets, angles that are appealing, message framing, live debates and public speaking, editorial board meetings.*”

“There hadn’t been a fully fleshed out plan before I began,” describes Jenny, “[it’s important to] have systems in place- what needs to get done when, coordination around campaign messaging, how you’re evaluating goals,” adding that she “was frustrated at first because the role was a lot more involved than what I had understood it to be. The role felt unreasonable given that I had never done it before. A campaign is not there to coddle you and provide you with professional opportunities, so it can feel abrasive at times and intense with no time for processing or getting the type of resources and support you want. But I grew into it. What helped me was *mapping out a communications plan including messengers, earned media opportunities, media events, goals for publishing op-eds and LTEs, campaign materials etc., doing everything possible to plan and set tangible goals on a week-by-week and then a day-by-day schedule. But we also had to be immediately flexible.*” Jenny further describes how “the pace of a campaign forces one to be efficient. [I had to tell myself that I didn’t] have to be a perfectionist, which creates all this extra work; get it 90% awesome.”



PCEF poster design credit: Ameya Okamoto

Jenny and Damon worked together closely, with Jenny managing the overall communications for the campaign and writing most of the email blasts and social media content, as well as serving as a media spokesperson, and Damon taking the lead on media work, such as drafting press releases, coordinating and coaching media spokespeople, contacting reporters and producing various communications materials. “We mostly operated by consensus, which worked really well,” recalls Jenny. Damon remembers how important it was that no matter how often he “was overwhelmed, I just kept showing up. I had never done anything like this and kept expecting people to shove me aside and hire a ‘real’ communications staffer; I had serious imposter syndrome and felt a huge responsibility on my shoulders. Understanding the love and trust we had for each other was vital; and telling myself that I’m going to learn and keep learning.”

In order to partly compensate for the lack of professionally experienced communications staff, the campaign paid a local communications consulting service, *C+C*, which *APANO* had had a positive prior experience with, for Jenny and Damon to be able to receive a small amount of coaching and for them to be able to consult with on some of the more important issues and decisions. “It was very valuable to have [*C+C*] provide feedback and guidance,” recalls Jenny, “We ran ideas for content by them, then we would create the content, and then we ran our content by them for feedback and asked them where to run it.” Jenny also recalls that *C+C*’s “speaker training was helpful...they kept us on the right path.” “Our communications skills were refined as a result of working with *C+C* and Paige” reflects Damon, adding that “*C+C* was very expensive, so we had to use them very judiciously. It was much more cost effective [for our campaign] to have in-kind staff manage and implement communications, with *C+C* for guidance.”

Polling and Messaging Strategy

In 2017, about 8 months prior to officially launching our campaign, we hired *Lake Research Partners (LRP)*, to conduct a full-fledged poll for us of likely Portland voters which, because of Paige’s relationship with one of their lead pollsters, “gave us cheaper rates that [they] normally wouldn’t give.” Paige describes the pollster we used at *LRP* as a “*highly qualified national pollster, one of the top five democratic pollsters in the nation. All of the funders and party officials- everyone knows her, so our numbers were taken as legitimate.*” Members of our steering committee including Alan, as well as Brent and Paige worked together with *LRP* to craft language for the poll such that it embedded a variety of racial, economic and environmental justice angles within the larger campaign messaging: something which *LRP* pollsters recommended and which had been lacking in our much smaller early initial poll. We wanted to make sure that it was not lost that this is a historic, people of color-led campaign that will manifest in real benefits to BIPOC and low-income communities. About half-way through our signature gathering, *LRP* discussed with us our polling results. “*If you lead with race, you drop,*”

they delineated.⁴⁸ “If you lead with jobs for everyone, including communities of color, then polling is stronger.” In addition, they interpreted that “climate change was not as major a motivating factor as reducing homelessness and economic growth,” recommending that we utilize “messaging on job training and economic opportunity, affordable housing and climate justice” and balancing it with our coalition’s desire for messaging that is movement-building and analysis-building.

There was “very little movement between polls,” recalls Damon when he saw the results of our second LRP polling in mid-September of 2018. Our pollsters highlighted four key messaging dimensions that garnered voter support (in order of effectiveness):

- 1) *Making corporations pay their fair share was particularly effective when paired with messaging about Trump’s recent (2017) 40% tax cut. Pairing these two messages made it far and away the most effective of all the messaging we polled.*
- 2) *Taking action on climate change was particularly effective when paired with doing something to counteract Trump’s rollback of environmental and climate protection.*
- 3) *Increasing clean energy.*
- 4) *Funding job training programs for people who need them.*

The strongest polling message combined these as follows:

The biggest corporations have record profits but do not pay their fair share in taxes. President Trump’s recent tax breaks gave them another 40% giveaway. This initiative makes sure that large retail corporations making over \$1 billion a year pay their fair share on the revenues they make here in Portland. And, it gives Portland the funding to take action at the local level to counter the Trump Administration’s rollbacks on climate change by increasing clean energy sources and clean energy jobs. We need to pass this initiative so that corporations pay their fair share and we can fund the clean energy and job training Portland needs.

“The number one thing about messaging,” contends Brent, “is it cannot be based on the doom and gloom of climate crisis- a campaign based primarily on fear does not work; the primary message must be positive.”

The pollsters also discussed our messaging vulnerabilities so that we could pre-empt and be prepared to counter them with our own messaging as much as possible. One such example, which our opposition would use a lot, is the claim that our measure focuses on the ‘wrong priorities.’

Jenny, and some of the other steering committee members, point out that the “second poll didn’t change [the course of our campaign] much; we could never do any TV or radio ad buys with our budget, and we were already giving 100%,” indicating uncertainty about whether the campaign should have conducted another poll at that point in time. But there was no question, concludes Jenny, that “the first poll [conducted by LRP] was an essential investment.”

⁴⁸ Addendum (July, 2020): It is important to note that this poll was taken in 2018 and that much has happened and continues to happen even since the writing of this manuscript, in particular the surge of public support for the *Movement for Black Lives* which, without a doubt, has had major impact public awareness and opinion on matters of race and equity.

“Paige had incredible political campaign experience- she had a strong sense for what plays well with voters and hammered it hard, keeping us on message,” recalls Jenny. “She was being very deferential to staff of color; I wanted her to start being more directive since we hadn’t done a campaign before. I tended to be more cautious and reserved so it was good to have her push harder.” Damon similarly remembers how “Paige wanted us to stick to what the polls were telling us to message, but she always deferred to frontline leaders. We knew racial justice was more alienating to voters and so didn’t lead with it, but we did make it very clear that this was about racial justice. We had more objectives than just passing measure- another campaign goal was to build a broad diverse communities of color-led environmental movement. It was meant to be a capacity-building effort and raise the profile of communities of color, which added so much credibility to our message.” Indeed, one of the explicit goals discussed at the PCEF retreat, over a year prior, was our desire to move the needle as much as possible on the public’s awareness and understanding of issues of race and equity in our city. It is also the reason for our campaign’s intentionality about the public face of the campaign.

Frontline Face of Campaign

“We had a very specific rule about frontline speakers representing the campaign,” describes Damon, noting that our campaign wanted to “raise the profile of the coalition’s communities of color groups.” Cary recognized the “tension between [our campaign’s decision to] center frontline voices and knowing that unfortunately, with the current power dynamics in our society, sometimes the public needs to hear from people who they identify with and who serve as third party social validators: white, higher income, unlikely [PCEF] supporters.” In the end, most of our campaign’s media coverage intentionally and successfully centered BIPOC voices in an effort to, as Damon puts it, *“redefine what an environmental campaign looks like and make sure [the public] does not forget that it is Oregon’s first environmental initiative led by communities of color.”*

The communications team had a small list of spokespeople close to the campaign who received coaching and would be available to speak to the press, editorial boards, public forums and/or debates when needed. All but one of the campaign’s official spokespeople were BIPOC, with our primary spokespeople being Jenny, Khanh, Tony and E.D.



Jenny Lee and Tony DeFalco at a public debate forum where they faced off with PCEF's opposition

E.D. describes PCEF as his “first ever involvement with political anything. I had steered clear of political campaigns;” a lesson learned from being a spokesperson is “what not to say- the press always twists your words; you have to be very careful about what you say and stick to the script. *It’s important to not go outside of the coalition’s rhythm. I had to always remember that it was not just me [I was representing], but the entire coalition.* That was humbling.” Jenny, who brilliantly faced off with our opposition in four major public debates⁴⁹ as well as multiple other editorial board and press events, similarly expresses

how important it is to “stay on message, be very careful what you say and don’t allow media to quote you out of context.” She also notes that “I’m usually extemporaneous, so practicing made a huge difference. *I tried to imagine ahead of time every question they could have asked me, and was very prepared to answer any question that came up*” having learned how to “make sure to control the narrative, never repeat the opposition’s frame and keep pivoting to our frame.”

Tony similarly explains how “preparation is very important to being a spokesperson,” remembering C+C as being valuable, but not sufficient. “We did these editorial board meetings and we were kind of prepared, but we could have been even more prepared,” reflects Tony. “We didn’t have a Communications expert to strategize on talking points to counter our opposition, or prepare for who was going to say what...We got better later on,” emphasizing how he “really liked working with Jenny- she’s great, I love working with Khanh, Maggie. I just see these women of color as where we’re going as a movement- the kind of thinking, heart and love for community that they have. I was very humbled by the experience of being part of such a powerful team.”

The communications team also recruited and *coordinated a ‘story bank’ of about 25 potential spokespeople* that they could draw upon, as needed, for press releases or other media coverage. These spokespeople, many of whom were BIPOC, *represented some of the breadth of constituencies supporting our measure:* from parents, youth and teachers to low-income renters, small business owners and doctors, and provided the campaign with supporting quotes that integrated their unique perspectives and respective stories. In replying to the question of what he was most proud of in his role in the campaign, Damon expresses that he is “most proud about building a stage upon which our spokespeople were able to share their stories with a really wide audience.”

⁴⁹[Portland Clean Energy Initiative, Think Out Loud Debate with Jenny Lee & Andrew Hoan \(Oregon Public Broadcasting radio, 10/15/18\)](#); [City Club of Portland Debate \(10/19/18\)](#) ; [Straight Talk: Portland Clean Energy Project Fund Measure \(Measure 26-201\) \(KGW, 11/3/18\)](#)

Generating Mainstream Media Hits

Media Consultants

“Having C+C was helpful for media outreach,” remembers Jenny referring to C+C’s established relationships with the local media. “They helped us with media strategy and how to pitch effectively to the press to generate media hits, how to host a strong media event with a compelling story and visuals,” similarly recalls Damon of C+C. “They gave us a more [cultivated] *understanding of the local media landscape*, for example an updated press list with what precise time of day to call local media outlets [to increase our chance of coverage], which outlets liked to be reached at what times, etc.” For Damon, his “number one advice” from his experience with generating media coverage, alongside “[having] a communications team to work with,” is “to *get on the phone and ask journalists if they are covering [your story]- actual human contact- or else it will likely get lost* despite the compelling stories and story lines [in your press releases].” In contrast, “the least effective strategy” Damon found “was just a couple of people doing a traditional press conference- that flopped the most.”

Earned Media: Creative Actions & Events

As we approached the final stretch before election day, a period of time during which our *campaign faced peak competition with the myriad of local, statewide and national mid-term election campaigns vying for coverage*, Khanh and I were tasked with heading the brainstorming and *implementation of a series of “really creative media actions and events,”* as Damon puts it, in close coordination with the communications team. Altogether, about a dozen events and actions were organized in the final four weeks of the campaign, evenly spaced out and strategically timed to maximize our chances of receiving media coverage. Jenny remembers the challenge of having “to put on a variety of high-quality events because we couldn’t control the news cycle,” noting that these actions were also successful at “engaging our base of supporters and make sure they’re also having fun. We had an exciting campaign and issue; we could use compelling stories and visuals.” The timing and locations of actions also had to work for local reporters. A few examples of such actions were:

Walmart Action: The People vs Greedy Corporations ‘Stop the Purchasing of our Elections’.

An [action outside of a Walmart and US Bank](#)⁵⁰ located on a busy intersection of a diverse low-income neighborhood at rush hour. The action called out the greed of the giant billion-dollar corporations that were funding the opposition to our campaign. Dozens of our campaign supporters, some dressed in colorful costumes, chanted and held up signs that read “Vote YES on Portland Clean Energy Initiative” interspersed with slogans such as Cary’s “Just 1% from the 1%” and “Walmart, Amazon, US Bank: Stay Out of Our Elections!”

⁵⁰ Short videos of Walmart and Schools for Solar actions produced by high schooler Yona Voss-Andreae



Walmart Action

Photo credit: ©Rick Rappaport 2018

Schools for Solar Action: Students Speak Up for their Future.

An [action organized with high school students](#) that featured students passionately speaking about the potential benefits of solar for schools and for their future in light of the climate crisis. The backdrop of a couple dozen students in front of their local public high school holding signs in support of our campaign made for a compelling visual.

St Charles Community Solar Story.

A story exemplifying how funding for solar, along with partnerships between BIPOC community organizations, local trade unions, a neighborhood church, utilities and the City can lead to increased community resiliency in low-income communities.

Past Portland Mayors for PCEF at City Hall.



A press conference staged in front of City Hall featuring all but one of Portland’s past living mayors speaking in support of PCEF, with a couple of them writing PCEF postcards to voters and bringing their ballot and marking the ‘yes’ box for PCEF in live coverage.

Former Portland mayors Bud Clark and Tom Potter writing PCEF postcards to voters in front of Portland City Hall

Hosting Alternative Community Media Press Conference.

Upon hearing about our opposition's planned press conference hosting mainstream media as their panelists to discuss ballot measures, the PCEF campaign decided to organize its own press conference at the same time and in the same building to highlight the contrasts between the campaigns; ours invited culturally-specific and alternative media to be panelists, representing voices of communities too often ignored in the media.

Faith Leaders Present Letter to Opposition in an Appeal to Morality.

Faith leaders, dressed in their respective religious attire, take action by paying a visit to the downtown office of the *Portland Business Alliance (PBA)*, which spearheaded the corporate-funded opposition campaign. The faith leaders pleaded with the PBA to heed to their moral conscience and support PCEF. The visual included a giant cardboard envelope addressed from the clergy to the *PBA* that symbolized the actual letter they wrote and read aloud.

Although we did manage to procure some media coverage with these planned creative actions, it was the events we didn't plan for -and/or that stemmed out of unexpected *controversy*- that were the ones that received the most media attention. Two such examples were:

Faith Leaders Locked Out by Opposition.



When faith leaders, led by Reverend E.D. Mondainé, president of the *Portland NAACP* and vice president of the *NAACP Alaska Oregon Washington State Area*, went to deliver their letter to the PBA and peacefully requested a meeting with the president and CEO to be able to read it to him, they were instead [locked out of PBA's office](#). Moreover, the PBA called on security officers to approach the faith leaders and kick them out of the building. Neither the faith leaders themselves, nor our campaign, had expected such a reaction from our opposition, which resulted in a story the media was eager to cover.

Faith leaders deliver letter to PCEF's opposition

Opposition Caught Astroturfing using Racist Tactics.

Big red flags went up for us when we noticed that the only actual people being touted by our opposition's campaign as coming out against PCEF- and whose quotes were being heavily utilized in opposition ads ahead of election day- happened to be of two people of color for whom English was a second language and whose small businesses were located in the diverse

neighborhoods east of 82nd Ave. Our coalition’s BIPOC groups then contacted their own immediate networks and were able to quickly find people who had relationships with these restaurant owners and could speak to them in person. Damon notes how our campaign “didn’t rush head-first into making sensational stories, we instead first had careful conversations in their native languages and relationship building.” It did not take long to determine that our opposition had indeed been fabricating grassroots support, also known as astroturfing. The small restaurant owners actually supported PCEF and were misled by our opposition.

“The forms that they signed, they did not fully understand,” Khanh was quoted in her explanation to [Mother Jones](#) of what had occurred. “Immigrants speaking English as a second language are particularly vulnerable to being misled by language that can trick even native English speakers. [Our opposition] is trying to create this semblance of local opposition that doesn’t exist.” These opposition tactics mirrored to an astounding degree what the carbon tax ballot initiative campaign in neighboring Washington was facing at the same time, and which we had reason to believe were not unconnected. BIPOC leaders in our campaign as well as in Washington’s campaign were particularly infuriated by a tactic that targeted and exploited their communities in an unprecedented manner for corporate interests. The story generated at least half a dozen media stories, forcing our opposition to take down the ads featuring the only two people listed as supposedly being against our campaign.



Shweta Moorthy of CCC with Hari Lal, one of two immigrant small business owners misled and falsely framed by the opposition

Key Opposition Talking Points

Brent recommends being prepared “to call the [opposition’s] claims out early and debunk them. Don’t follow the advice that you shouldn’t repeat opposition messaging, because these are the

richest corporations in the world so [the public] will hear their messages anyway. The sooner you address what their messages are going to be, and debunk them, the better.” Paying close and early attention to our opposition’s talking points was helpful in preparing our spokespeople to counter their framing at every opportunity and allowed us to “pre-empt opposition arguments in our materials” explains Jenny. Here are key examples:

The False Dilemma

Our opposition had very few community leaders willing to serve as their spokespeople or tout their talking points, with the notable exception of Portland’s mayor who, in the midst of our campaign, was [quoted in the local press](#) as stating that for him "right now, housing and homelessness and education are the top priorities...I'm not going to say more, other than I have already been very clear and on the record about my opposition to a gross receipts tax." The mayor uses the logical fallacy of creating a false dilemma, a tactic often used by politicians or campaigns, i.e. expressing their support for another important priority, typically one most voters can immediately get behind such as housing, as the reason he cannot also support our climate justice campaign and big retail corporations paying their fair share, when one can, in fact, support more than one priority. If anything, our measure provides funding for energy efficiency in low-income housing which decreases the cost of utilities, in addition funding job training and economic opportunity for low-income communities. Our campaign had anticipated this line of argument, which is partly why we solicited and received so many endorsements from affordable housing advocacy organizations.

Knowing what’s Best for BIPOC...Better than BIPOC Do

Having a large and diverse BIPOC-led campaign no doubt made it more difficult for our opposition to paint our measure as regressive, but they nonetheless tried while knowing that Portland has a majority of progressive-leaning voters. In addition to their foiled attempts to have minority small business owners make statements that our measure would harm their business, they would also often try to first paint themselves as caring about the environment and equity. The president and CEO of the *PBA*, in [publicly debating](#) our campaign’s BIPOC leadership, who have dedicated their lives to advocating for BIPOC on issues of social, racial and economic justice, would express with flourish how he was in full alignment with the environmental goals of the coalition behind our campaign. But then, in an incredible *display of patronizing behavior*, would proceed to explain to our BIPOC leaders -to their face- that they are just misinformed and that taxing the largest retail corporations would hurt the very communities that they are trying to help. The *PBA*’s CEO’s implication that our campaign’s BIPOC leadership did not understand tax or revenue policy was even more galling considering that Jenny had years of experience lobbying on tax issues. Although unsurprising, it is nonetheless noteworthy to point out that the *PBA*, in actuality, has a long history of having its core value be the profit of big business, which it represents, over all else: from its consistent backing of the fossil fuel industry over the environment to its fighting of any legislation that would tax big corporations- whether it be for funding education, healthcare or anything else.

Hiring of ‘Experts’ & Implications of a Libertarian Worldview

The *PBA* not only has a long history of opposing all environmental legislation crossing its path, always favoring the fossil fuel industry, but the opposition argument that a measure crafted and led by BIPOC would in fact hurt its communities was based on an economic report

commissioned by the *PBA* itself. The author of this report, presented by the opposition campaign as an ‘expert economist’, works for a climate-denying policy institute predominantly financed by out-of-state secretive national donors pushing a right-wing anti-labor libertarian agenda that profits the world’s largest corporations over everyone else. Moreover, the report was written using technical jargon but contained no actual evidence to support the report’s conclusion, and not a single reputable citation to back it up, in yet another commonly employed misinformation tactic. This ‘expert’ report and author was utilized by our opposition in their press releases and at a public forum debate. It is profound to *contemplate what the opposition’s line of argument implies about our current economic system- that even at a time when the nation and the world are facing record inequality, they believe that the largest most profitable corporations in the world should not ever be taxed because they will just pass it onto low-income consumers and hurt those most vulnerable*⁵¹.



Corporate-greed-monopoly man lassoed by the Portland Power Squad

Opposition Fall-back Strategy: Muddy the Waters, Obfuscate and Alienate

At around the same time, the opposition campaign also spent a significant amount of money hiring another, more reputable, economics firm to write a lengthy report that in essence stated

⁵¹ It’s important to note in this context that in our current economic system based on maximization of profits over all else, big corporations are already decimating vulnerable communities, along with the livability of our planet, with their negative externalities.

that it wasn't clear exactly how much money would be raised by the surcharge on large corporations, giving an estimate of \$35-79 million a year. The opposition intentionally conflated the two economic reports in their press statements, making it sound as if expert economists agree that the measure is regressive and that, because it was not clear which exact companies would be affected, it was "*poorly written*" and too "*vague*". Although it's true that the City cannot divulge which large retail businesses it currently applies its business license surcharge to, the measure was, in fact, quite clear in defining retail such that it was consistent with the City's own definition, as well as spelling out exemptions, with any remaining ambiguities to be worked out in the rule-making process. The argument that a measure has great intentions but is poorly written, is also a tried-and-true tactic the opposition employs when it has no other arguments to fall on. Another "poorly written" line of argument that was laughably and cynically utilized by our corporate-backed opposition was that our measure wasn't progressive *enough*- that we should have written it so that *all* the grants (not just half of them) must go to only low-income people and BIPOC. The measure was, in fact, intentionally written to incorporate enough flexibility so that PCEF could fund energy efficiency or solar projects for mixed-income housing or public schools, which would also likely co-benefit middle class Portlanders: a nuance our opposition (including one of the major local papers that came out against PCEF) completely distorted to make themselves sound as if they were more progressive than the diverse BIPOC-led coalition behind the measure. They also, of course, purposely failed to mention the many safeguards written into the measure to ensure a fair grant-making committee and process that includes representation from the most vulnerable communities.

'Wasteful Use of Tax-Payer Money' & 'Voters will be Double-Taxed'

'We already have *Energy Trust of Oregon*' goes the opposition line, referencing the twenty-year old government-mandated Oregon non-profit that generates its revenue from utility taxes paid by consumers 'starting another redundant initiative seems wasteful and a misuse of tax revenue that is critically needed elsewhere.' If PCEF passes '*voters will be double-taxed*' goes a similar opposition talking point. What our opposition of course fails to admit here is the fact that the *Energy Trust of Oregon (ETO)* cannot possibly fund all the energy efficiency and renewable needs, particularly when it comes to helping low-income renters. In Portland alone, of the 249,000 single family and multiple family housing units, approximately 50% don't have any weatherization and 85% of which are in need of energy efficiency upgrades.

"The first point is that the level of renewable energy assistance has been extremely paltry," explains Brent. "The federal government had incentives, but the state under a Democratic legislature has just gotten rid of the tax credit for solar and energy efficiency funding has been constantly under threat, with very little hard cash to stimulate renewables and energy efficiency spending. ETO has some weatherization available for low-income -although it's totally insufficient- but otherwise few of the funds go to low-income communities. PCEF will put more money into energy efficiency and renewables in its first year than ETO's entire statewide budget on renewable budget and renewables, which spent ~\$1.8million in all of Oregon on solar in the most recent year."

Our campaign's counterpoint argues that it isn't an 'either/or' - rather it is an 'and/and' situation - since *ETO* programs complement, rather than replace the need for, *PCEF*. *PCEF* also provides more money for energy programs that also provide community benefits like green jobs training

and healthier homes. “[PCEF] will create a stable source of long-term funding that is aligned with the scale we need at the local level to address climate change and economic equity, which no existing programs do,” reads our FAQ regarding this line of opposition argument. “Other programs may have similar energy efficiency goals, but current programs only work for property owners with the means to make significant contributions to the projects and/or have the ability to utilize tax credits.” Our FAQ goes on to describe how the *Oregon Public Utilities Commission*, whose mission does not include climate change and social justice, had cut residential energy efficiency incentives available via the ETO “and current solar funding and solar tax credits are also on the chopping block at the federal and state levels...Funds from this initiative will help stop the boom-and-bust cycle of insufficient support for energy efficiency and solar by utilities and public agencies, as well as provide much needed support for our most under-resourced residents and neighborhoods.”

“There is no such thing as redundancy in our climate response- we need way more resources than are currently available, particularly from sources that don’t exclude low-income people and communities of color.” -Alan Hipólito

Social Media

“We had an incredible volunteer structure for putting out diverse social media content that still had quality control,” describes Damon of our campaign’s “small army of social media volunteers” embedded within the communications team. The social media sub team was tasked with creating regular content for our social media channels, primarily on *Facebook*, as well as *Instagram* and *Twitter*. All content would be reviewed and approved by Jenny before being posted by the team, at a rate of ~3-5 different posts per day for the final weeks of the campaign. “Get approved for political advertising as soon as you start your page” is the first piece of advice Jenny emphasizes, noting how at least one individual within the campaign has to “put their privacy on the line” and how much the rules had changed over the 18 months prior, “*Political ads were really hard to set up and so frustrating after the 2016 presidential election, [so give yourself ample time to] understand all the rules and the verification that’s needed.*”

Jenny also points out how the algorithms on social media sites keep changing, and therefore advises consistent “monitoring of your metrics to see what performs well, for example posts with more photo or image and little text, posting at certain times of the day,” although she concedes that “sometimes it seems random.” “News stories from reputable newspapers/sources” gave our posts a higher reach on social media, observes Damon, who also notes that “social media was equally important to voter outreach as [it was to] inspiring our base of volunteers.”



Schools for Solar action

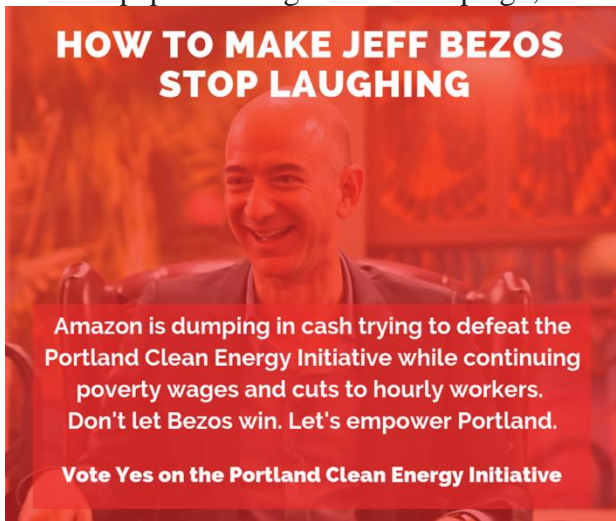
“Paige was helpful in guiding the manufacture of video ads,” recalls Jenny, who notes that “most of our ad buys were on *Facebook*. *Twitter* and *Instagram* had lower traction [for our campaign].” Damon further describes how “we put a good deal of ad money into targeted videos in an iterative process, where we first analyzed [the metrics to understand] which had the best [organic reach] before putting more money into it.” Although the campaign did hire a local production company to create a couple of professional-looking [video ads](#), at a reduced rate, that successfully reached “tens of thousands [of viewers],” Damon notes that “*the videos don’t need to all be or look professional- your son [Yona Voss-Andreae, himself a high schooler] used his own camera to create a [short video of the \[Solar for Schools\] high school student action, which became the most viewed PCEF campaign video on social media viewed well over a hundred thousand times.](#)*”

In addition to short videos, other types of posts/memes included:

- Posts with graphics to help visually explain the measure.
- Memes translated into the languages spoken in some of the communities that would benefit from PCEF, for example: “Es tiempo de tomar acción para energía limpia y

trabajos buenos. Vote SÍ a la Iniciativa de Portland para Energía Limpia, Medida 26-201”.

- Posts featuring photos of some of our many endorsers, often with a short quote on why they were endorsing. Two examples are:
 - “*Human Solutions* says YES to #PDXCleanEnergy! One of the best ways we can prevent homelessness is by making sure people can afford to stay in their homes. By creating good jobs that also reduce energy costs for renters and homeowners, we’re taking a holistic approach to some of the biggest social issues in our city.”
 - “*Equal Exchange* endorses #PDXCleanEnergy! Many of the smallholder farmers we source from are already significantly impacted by climate change. *Equal Exchange* supports this community-led effort to mitigate contribution to the problem, and to hold corporations accountable in the process.”
- Newspaper coverage of our campaign, such as [Bill McKibben’s mention of our campaign in his *Washington Post* opinion piece](#) about “groundbreaking energy ballot measures”: “In Portland, Ore., for instance, voters could well pass a clean-energy ballot initiative that calls for a tiny surtax on the largest national chains operating in the city to be used for clean-energy projects in the city’s poorest neighborhoods. The measure has run into the usual wall of money, however, in this case coming more from retailers than oil companies. (Amazon, whose chief executive, Jeffrey P. Bezos, owns *The Post*, is one of the big donors, apparently unsatisfied with the \$723 million it won from the federal tax cut last year.)”



PCEF social media meme

- Social media postings featuring some of our celebrity endorsers, such as Van Jones, who called out PCEF as “the most important ballot initiative in the country” at the start of his speech when he was on tour in Portland.
- Colorful posts promoting volunteer opportunities with elements of food and fun
- Posts of our media events and actions or short clips of our volunteers in action. Examples include a short clip of a city commissioner canvassing for our campaign; and a post of Micah and his wife, who had gotten married midway through the campaign, photographed in wedding attire with a PCEF lawn sign between them.

Op-Eds & LTEs (Letters to the Editor)

It was not until the final couple months of the campaign that we began organizing a volunteer-led effort to get more of our supporters to submit Letters to the Editor (LTEs). The LTE coordinator role, taken on by one of our remarkable lead volunteers, Jay Parasco, utilized a model similar to that of 350 Mass, an affiliate organization of 350.org that shared their method with our campaign. The model basically involved rallying our campaign’s supporters to submit their own LTEs in a somewhat coordinated fashion. This is done, in part, through the outreach of coalition organizations, such as *350PDX*, to their membership. People willing to write one or more LTEs

are encouraged to sign up to an email list where they can receive regular updates from the campaign's LTE coordinator, who tracks their submissions. The LTE coordinator also provides some basic guidelines for LTE writers on how to write compelling LTEs, provides suggested talking points and tracks news stories in the local papers that were directly or indirectly related to our campaign, proposing them as potential story hooks.

Our campaign also hired Cary as a communications staffer for a few weeks toward the end of our campaign, whose role included supporting media events and helping create content for press releases, talking points, LTEs and Op-Eds as well as providing guidelines for LTE writers. Jenny notes, however, that dozens of people wrote "lots of really well-written LTEs, but very few got published" and, in hindsight, reflects that when it comes to LTEs it is "quantity over quality."



Halloween canvass

"Don't waste time trying to perfect your LTEs" or trying to find the perfect messenger," advises Jenny. "Rather the more you can saturate submissions with high volume, the more likely [the newspapers] are to publish them; we sent in an average of 20 per week to the papers that published LTEs...and got at least 2 per week published in major local papers from September through the election." Our campaign's LTE coordinator "did an amazing job in getting LTEs published," notes Damon. "Every outlet that would take LTEs told us we kept flooding them, so they kept being willing to take more."

Cary also helped create content and coordinated the submission of Op-Eds from campaign spokespeople and supporters. In the final month of the campaign, it was in large part due to her efforts that six Op-Eds were successfully published out of approximately a dozen that were coordinated and submitted, most of them in the larger local papers. Jenny notes that it is quality over quantity *when it comes to Op-Eds, the "reverse" of that for LTEs, explaining that the "messenger is key": papers want the author to be recognized as a leader or affiliated with an organization. "It is better to submit few higher quality ones and make sure every [Op-Ed] you submit includes your winning messages, because most don't get published."* Op-Eds that succeeded in being published included one from E.D., our co-chief petitioner and president of the *Portland NAACP*, who [wrote about growing up experiencing environmental racism](#) and the need for corporate accountability. Another example was from *APANO* about how *PCEF* would help ease the city's housing crisis.

Communications by the Numbers

"All the other campaigns were saying we punched way above our weight class in terms of numbers of LTEs, media coverage, Op-Eds etc.," recalls Damon.

Press Coverage

There were just over a dozen media stories covering our campaign in the run up to the launch through the submission of petition signatures, and over 40 media hits in the final two months of the campaign and immediately following the election, including 10 in the national press (breakdown listed in [Appendix D](#)).

Press Endorsements

We received endorsements from 5 local newspapers. Two larger local papers came out in opposition to our measure (breakdown listed in [Appendix D](#)).

Social Media

The campaign's targeted paid digital video media, paid digital media display and *Facebook* boosted post reached millions of Portland viewers (breakdown listed in [Appendix D](#)).

Op-Eds

Six Op-Eds featuring our campaign were published, or approximately 50% of those submitted by our campaign. By contrast, our opposition had only 2 Op-Eds published (breakdown listed in [Appendix D](#)).

Letters to the Editor

Our Communications team tracked supporters who reported that they submitted an LTE in the last couple of months of the campaign (most were submitted to one of two larger local papers that publish LTEs). The results for LTEs was similar in the month prior, with an average of 2 published per week (~10% rate of getting published; breakdown listed in [Appendix D](#)).

Political Fundraising & Finance

So much of a typical campaign's success relies on raising the necessary funds. Political campaigns often rely heavily on a small handful of "angel" donors: wealthy donors who are willing to provide much-needed campaign cash early on. This allows for campaigns to hire an experienced campaign director, a communications director and other key staff from the get-go. Early funds also allow for a campaign to rapidly hire a paid signature operation to gather most of the required signatures and full-time seasoned field staff organizers, as well as pay for early and regular polling throughout the campaign, proper data systems and all the other needs of a typical fully functioning campaign. But our campaign, as Lenny puts it, "had very little connection to the big machinery of establishment Democrat-labor-progressive major donor networks" and "*by and large, the traditional Democratic donor class were not into what we were doing,*" recalls Alan who, despite having no prior experience in political fundraising, courageously stood up to the challenge and filled the void of heading the campaign's fundraising team efforts. Given these significant limitations, it is remarkable that we were able to continually raise just enough funds to succeed at each stage of our campaign -albeit not without major challenges- by also *making do with a fraction of the funds of a typical successful campaign.*

"Fundraising was very tricky, and when I first joined the fundraising team," remembers Trevor, "it didn't have enough structure and focus. Ultimately it worked and did well, but we really

should have started earlier. The limited resources during the signature gathering was very hard.” Shortly after launch, the campaign hired a part-time fundraising staffer to put together a fundraising plan and help implement it, but it proved to “not work as well as we had hoped,” concludes Alan. This may have been because in a short-term campaign there is no time to develop donor relationships so the pre-existing networks and relationship one brings are key; detail-oriented project management skills are also incredibly important for fundraising in a somewhat decentralized campaign structure. *Some of the earliest funds we needed in order to launch were donated by the mainstream grassroots environmental groups in our core coalition- none of which had a lot of extra cash on hand, particularly ‘political cash’, which cannot be raised through tax-deductible donor contributions or by most foundation grant funding.*

The fundraising team focused on donor research/identification, targeted donor meetings and solicitation, using our coalition’s networks to target donors already giving to climate and/or social justice causes or companies invested in renewable energy and energy efficiency. We also made an ask to progressive campaigns and candidates that were not currently active if they would be willing to donate any leftover campaign funds or introduce us to their major donors. We launched a crowdfunding campaign, and later on [ActBlue](#), to raise individual small dollar contributions; and organized several briefings for potential major donors. “We tried to build in traditional fundraising,” reflects Paige “but we didn’t have the capacity for it and wasted some time and money trying to build it. Although we did try, in a dream world we would have succeeded in getting commitments up front from an institutional player with an established network and power base to make you their top priority.”

Ultimately, only a “very narrow slice of climate donor class was into what we were doing,” remembers Alan of the challenging task at hand, “which was compounded by the fact that, as Brent puts it, “we were so novel that no one understood it” and many believed we would not be able to pull it off against a powerful opposition.”

The big break came when State Representative Keny-Guyer, who had endorsed our campaign, introduced us to the *Green Advocacy Project (GAP)* and, as Alan remembers it, “helped them see what it would mean if we won- that it was a new demographic majority that could win climate campaigns and that it would only work if we centered community in this way. *Every campaign needs an angel and we lucked out getting it in GAP. They were one of the first groups that thought we could win. Their second grant was given after they saw we could win and understood what that meant.*”

“I think we did the best we could, given the circumstances,” reflects Alan. “All in all, we did great. Some of the groups, including *Verde*, Sierra Club, *APANO*, already had decent networks and relationships.” The campaign also received “a good amount of money from the national Sierra Club. *APANO* and 350 got some national money. Mine your existing relationships. Who do you know who knows them? We banged on Sierra Club for a month straight,” recalls Alan. “Fundraising is relentless.”

Finance & Compliance

In parallel with fundraising, our core coalition learned a great deal about how to set up systems for a PAC and handle different sources of funding. Ensuring we had impeccable compliance was

of utmost importance and Paige advised our campaign to pay a local firm, *C&E Systems*, to professionally handle our reporting compliance and bookkeeping, as well as deposit funds and send checks to campaign staff and vendors. It took some time to get all of our other systems fully in place and organized, which was aided a great deal in the last 2-3 months of the campaign by hiring a financial management consultant for 3-5hrs/week as well as recruiting an in-kind campaign staff compliance officer from *APANO*.

As Tony recalls “having a [financial management consultant for the campaign] to help us use 501(c)(3), 501(c)(4) and PAC sources of funding and accounting systems and that could handle these different sources was critical.” The financial management consultant worked closely with our campaign manager to help put together budget-to-actuals for the PAC. Having a compliance officer was also very helpful, particularly in our semi-distributed campaign model that had many in-kind staff from 9 different non-profit organizations⁵².

Fundraising & Budget by the Numbers

During the entire 7-month campaign, our PAC fundraised and spent just over \$500K from ~750 donors, with in-kind contributions totaling another roughly \$250K (breakdown in [Appendix E](#)).

“The moment I felt risk most, was when we first launched. We didn’t have funding in the bank, we didn’t have recent polling, we had no paid campaign staff, no petition director, I was like ‘ok, hold onto your seat!’” recalls Laura, reflecting how “this campaign was extremely underfunded for how amazing the policy, the coalition, and the work that we did was; we made the campaign happen through sheer grit, determination, and inspiration.” The fundraising and expenditure timeline for the PAC is indicative of the continual budgetary constraints we faced (see [Appendix E](#))

In the final two months of the campaign: raised ~\$300K, and spent roughly the same amount, with an additional approximately \$100K in-kind contributions (primarily in-kind staff time). Roughly half of the total cash expenses for our campaign in these final two months were for communications and a quarter for paid campaign staff (breakdown in [Appendix E](#)).

Political Fundraising Lessons Learned

“Having a good campaign plan and strategy early on is key. When you go to national donors, it’s important to educate and get them on board early,” advises Brent, reflecting that “we could have done a lot better putting together a package of well-designed professional-looking materials earlier on.”

⁵² The officer was tasked with sending regular compliance reminders to a point person at each organization, and collect dollar amounts for in-kind staff time, overhead on wages/salary and supplies/expenses, which needed to be collected and reported to our compliance firm within 7 days of each organization’s wage or salary expenditure. Each organization is also expected to track and later report for tax purposes all its contributions to the PAC as direct lobbying expenditures, given that the campaign was about influencing ‘legislators’ which is what voters are counted as in the case of ballot measures.

“Ask bigger, and ask more funders, even those you don’t know. And don’t be afraid,” advises Tony, who played a key role in networking and helping cultivate most of the funding relationships for our campaign. “We were routinely being told ‘no’, despite being modest in our asks. We asked a lot of people for money, but we didn’t think it through enough and our committee was too small and wasn’t high powered enough with built networks. It would have helped to have a fundraising committee with really good connections. We also never set the right goals- our [expert campaign advisors] said ‘raise a million dollars’, but we needed a campaign approach to do it with a coordinated strategy and realistic interim goals. We did have a good snowball effect, by virtue of asking people and being persistent.” “You never know when someone is going to watch you and make a \$50K donation, as *GAP* did” reflects Tony, referring to the first major funding we received from *GAP* shortly after signature gathering, and then a second surprise visit and major funding during our GOTV campaign. “You have to be showing you’re a winner all the time.”

For Trevor “one of the biggest lessons learned was [that *we should have focused*] on fundraising as much as [we did] on policy.” Alan, however, sees a *silver lining to not having raised a lot of campaign cash up front*: “*We gained this tremendous leadership model and this great investment of time and resources of all our coalition members,*” he reflects. “We had a volunteer bookkeeper and an in-kind campaign manager and staff. What would we have lost in experience and skill-building if we had had enough money for ten paid temporary campaign staff? Of course, it would have been great to have more money up front, as it would have allowed us to distribute it across our coalition to further increase our collective capacity, in addition to hiring a few central staff earlier on.”

When asked whether there were challenges posed by a need to balance the fundraising needs of one’s individual organization with that of the campaign, Tony responds that fundraising for the campaign “was hectic, we were juggling a lot of balls. The challenge was it became a big chunk of my work for the 6 months before Election Day, but we came out more sophisticated in the end and it led us into greater political advocacy funder conversations. So, for example, *Alkai* invited us to submit a proposal to set up a 501(c)(4) for *Verde* which is a big deal. It made us realize how valuable different streams of money are; in order to win a campaign like [PCEF] you need to have access to both monies, and we gained access from this campaign.” Alan believes “all of our organizations should benefit and will improve because we won. We have a story to tell funders that we didn’t have to tell before. We now have a level of political influence that we did not have before- politicians need to talk to us.” Moreover, predicts Brent, “now that we are the only climate justice ballot measure that succeeded, it will be easier for others to get national money [to do something similar].”

A Peek behind the Opposition’s Campaign

Our opposition’ political action committee bore the comical title *Keep Portland Affordable* and was spearheaded by the *Portland Business Alliance*. They raised ~\$600K from the contributions of ~20 large corporations and spent most of it in the final two months leading up to the election. Most of the big corporations that funded the opposition campaign, in addition to receiving a windfall in tax savings from Trump’s and Republicans’ tax cuts, also find other ways of evading their fair share of federal taxes, including *Comcast* (*uses tax loopholes to evade federal taxes*), *US Bank* (*uses overseas tax havens for federal tax avoidance*), *Home Depot* (*avoids hundreds of*

millions a year in federal taxes), Walmart (uses ~75 overseas tax havens and other loopholes to avoid \$1billion a year in federal taxes), and Amazon (which paid [zero federal taxes](#) in 2017 and 2018, despite soaring profits). *Although the amount spent by our corporate opposition constitutes roughly twice the figure that our grassroots campaign was able to spend during this same period, it is only a fraction of what we had originally predicted would be spent by our large corporate opposition and a fraction of what big corporate opposition typically spends to defeat ballot measures they oppose (as was observed in the remarkable and diverse coalition behind the statewide carbon tax ballot initiative campaign in neighboring Washington state, which was [outspent approximately 5:1](#) by their fossil fuel industry opposition, enough to soundly defeat their measure in the same November 2018 election).*

The fact that our opposition spent only about twice as much as we did in the same period of time was, of course, very fortunate for our campaign, and there are differing conjectures on why that may have happened. “One reason the opposition didn’t come for us [in a bigger way],” conjectures Paige, “was that PCEF targeted only a small subset of the largest corporations in our City in a state that has the 7th lowest corporate tax rate in the country. Perhaps the opposition thought it was more trouble than it’s worth to come after our coalition of faith leaders, communities of color etc. - i.e. their customers. “They ran a terrible campaign,” reflects Brent. “We did not run a perfect campaign, but we ran a good campaign.” Brent speculates that *the biggest reason may be that “they did the polling and realized that [PCEF] was an extremely strong measure that they couldn’t stop even if they put a ton of money into it.* When they went to talk to big donors who ask to ‘show us your polling numbers when we make our best argument’ and the poll numbers don’t move much- they don’t want to donate as much money.” Brent further speculates that the corporations might have been “afraid to have their name attached to [PCEF’s] opposition because we had a really diverse communities of color-led coalition with a broad base of support, a well-written measure and an energized campaign grassroots base. There’s no doubt that having a strong coalition with strong messaging out of the gate helps deter opposition funding.”

“I still think every community [aiming to pass a similar measure] needs to expect a major opposition campaign,” advises Brent. “Other groups might have an easier time raising funds with PCEF in the rearview mirror, though they need to have a robust fundraising campaign plan and the core of their campaign will have to be grassroots.”

Additional Lessons Learned

Earlier Coalition Building

“I think we needed to do more coalition building from the start,” reflects Khanh. “It took a large coalition to win this campaign, but most of the coalition didn’t have the opportunity to participate in the retreat we had, in which we initiated a process to build trust, shared values and political alignment.”

Earlier Volunteer Engagement

“We had about 40 volunteers, with a third being more regularly involved,” recalls Micah of *Portland Audubon’s* volunteer engagement. “There wasn’t the level of engagement that I had hoped for and I think a strategy that was successful that you implemented well at 350PDX was to

bring folks along a year ahead of launching to understand and educate them around the issue- that built a stronger base of volunteers that could be tapped. We didn't have the capacity or foresight to do this. I think that was one of the major reasons 350PDX and Sierra Club built up such a core of folks.”



PCEF, APANO, OPAL co-host joint canvass

Incorporate Power of JEDI

“Having a JEDI [Justice, Equity, Diversity & Inclusion] analysis for our coalition would have been helpful,” reflects Jessica. “We had a few volunteers come in with micro-aggressions, though not often, and although our organizational allies did step in when requested, JEDI training would have provided them with the necessary tools to be constantly on the lookout and immediately step in.” Along the same lines, Micah expresses that he thinks the campaign and coalition could have tried harder “to bring the volunteer base along to better understand the intention we were taking with centering frontline communities. Mostly they got it, but sometimes not at a deeper level.” Tony also echoed this sentiment: “it would have been valuable to have more learnings around racial justice and DEI [Diversity, Equity & Inclusion] work as part of our campaign- for all the volunteers to get some training in racial justice- with demonstrable outcomes on anti-racism and possibly other isms. There just wasn't time.”

Shifting the Campaign Paradigm

For Micah a key outcome from working on the PCEF campaign was the shift away from “the old campaign paradigm that trying to build electoral power east of 82nd is a waste of resources; winning was a priority for our campaign, but it was also in line with empowering communities that had been left out. We really saw a huge benefit from focusing on these neighborhoods, both in turning out that electorate but also empowerment through grassroots organizing, not only for PCEF, but also for future campaigns.”

More Resources for Opposition Research

“We didn’t do enough opposition research,” reflects Tony. “*The Crag Law Center* provided us with some legal advice on how to speak publicly about the measure so as to make it as hard as possible for our opposition to challenge the measure after passing it, but it would have been good to have more resources dedicated to opposition research and legal support.”

More Resources for Frontline Community Organizing

“Folks overestimated how much money we were going to need,” recalls Alan. “Frontline community organizations are used to doing things without a lot of money. We were in a position where we were determined to win, and the people who knew how to win -Brent, Paige- were also defaulting to frontline leadership.” “However,” replies Alan to the question of whether there was anything that could have further facilitated the campaign experience for BIPOC groups, “it would have been great to have more resources earlier on to invest in community organizing and building the grassroots”. “For as long as PCEF gestated, it moved really fast once the campaign started,” reflects Tony. “We could have done earlier integration of the campaign with our existing outreach functions, but we didn’t have enough resources to do it. If I were going to do it again, I would have sought resources earlier to hire an organizer and start community engagement earlier.” E.D. also expresses how “the *Portland NAACP* was the only steering group without any paid staff, so it was a big challenge. It would have been very helpful to have had at least 3-4 paid people who are committed and dedicated to the coalition from the beginning to engage and organize our community.” Jenny similarly replies that “one of the key takeaways is a need for the investment of additional resources into organizing with underserved communities such as voters of color; to also reach people that haven’t been reached before and build your base,” adding that “some of the political consultants from other campaigns didn’t have this same vision of building the political power of communities of color. The PCEF model is a way to build engagement of young women and POC -the new emerging electorate- and to ensure that the results of our elections reflect what people want.”

More and Better-Paid Field Staff

“19 out of 20 times I felt things worked very well,” recalls Jessica. “However, as things ramped up, and got more intense toward the end we needed more paid field staff support. We had two full time staff and two part-time staff [in the final few weeks of the field campaign]. This was not enough staff, as well as not hiring early enough, for the enormous lift we undertook. Winning the campaign is not the only measure of success. It’s important for workers to have space for self-care. Field staff took on an enormous burden to achieve that success, sometimes at the cost of their own well-being. A better approach would have been to prioritize the necessary support structure and space needed for field staff to practice self-care.” In addition, Jessica notes that

“PCEF paid well compared to other campaigns, but still didn’t pay enough per hour, and it would have been great to get health care benefits.”

More Time for Volunteer Training

“I wish we could have had more time with a more robust ‘training academy’ for activists,” reflects Paige. “Our exec committee learned a lot, paid field staff as well, but we missed the opportunity for more broader skill-sharing with every aspect of the campaign.”

Better Communication and More Clarity on Structure

“It’s important to think early on about the internal structure and equity considerations, how we build trust and communicate,” reflects Cary. “It’s important to make sure we’re living out our values internally. In the campaign dynamics, with the sense of urgency it brought, there were decisions made that weren’t always clearly communicated. It would have been good to have a



clearer articulation to everyone involved about decision-making processes, defining what the steering role is vs exec committee that formed later vs staff on daily calls. This is a huge learning experience and I didn’t expect it to go perfectly. I love PCEF and am so glad to have been part of it.”

More Intentional Post-Campaign Celebration

“One of the tensions that exists is a campaign’s priority of winning in the short-term vs organizations’ desire to increase power building long-term; the campaign tried to balance these, but leaned toward winning,” reflects Trevor. “For instance, we had an election night party,

but we could have also built into our campaign plan from the beginning a celebration which would also have allowed our volunteers to easily connect with other, already existing, organizations and campaigns after the election. Instead we lost some of that momentum and a lot of talented people.”

Other Learnings

PCEF’s frontline leadership was critical to the campaign’s ultimate success. Brent describes how BIPOC leadership “1. Provided essential expertise in drafting the ballot measure that was

meaningful and addressed their biggest concerns. 2. Provided a real base of energy that they put towards passing the measure. 3. Many people are pretty sick and tired of single-issue efforts and so trying to be more comprehensive in how our diverse coalition linked issues together to address multiple issues that are different sides of the same coin was important. There's a strategic value there as well- we are used to opponents of climate action attempting to fracture based on race and class, by having a strong alliance from the start makes it difficult if not impossible to use their standard tricks of division."

Building Political Power

Two key goals of our initiative, which our core coalition had discussed early on at the retreat a year before our campaign's launch, were to build the capacity for our coalition -and for BIPOC organizations in particular- to gain the knowledge and skill-sets necessary to run a successful political campaign and thereby also build political power. "It's pretty clear that communities of color have stepped into leadership roles in the local climate policy making context in strong alignment with mainstream climate groups," reflects Alan. *"The coalition would not have been possible without it being frontline-led. Although communities of color groups were already involved in policymaking, it's now at a different level. communities of color that were already active in the climate justice movement [when we began the PCEF campaign] remain active- possibly even more so, and the groups that weren't involved before are now much more so. And all of us collectively, through the implementation process -which is also policymaking- are exponentially more capable and engaged."*

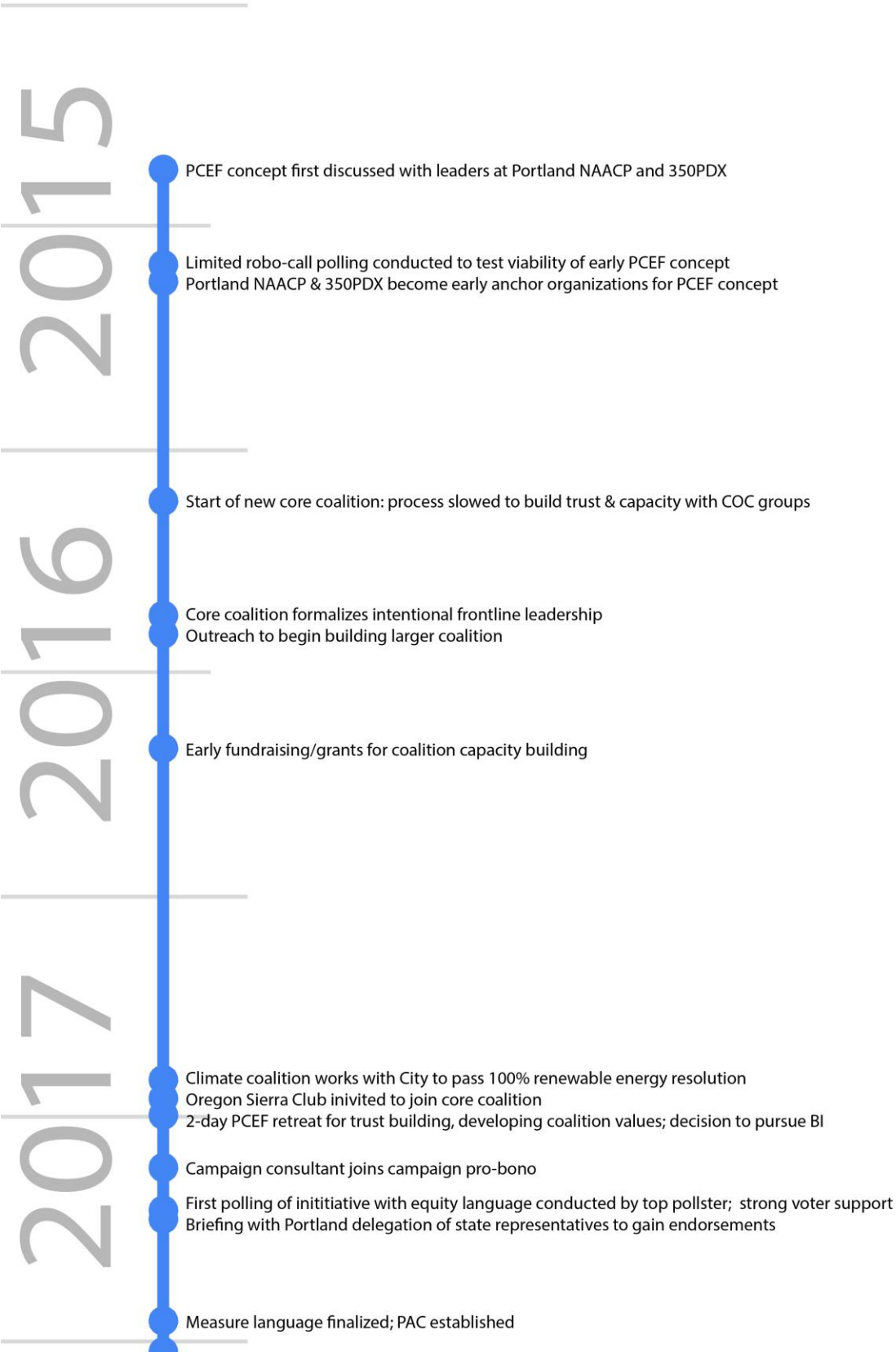
"It was a major victory against powerful interest and showed the positive power of running a super grassroots campaign to get it done; winning this initiative signals power," reflects Jenny. "Having mostly in-kind staff with only a couple of experienced campaigners was a fairly unique model which allowed many of us to gain lots of experience - and now many other groups are thinking about this model. As a policy we led with race, even though we didn't lead with race politically, but still mentioned it. Spokespeople and the public face were communities of color and we had leaders of color staffing and leading the campaign."

"Together we managed to shift the narrative and significantly increase the political power of communities of color." -Jenny Lee

"We gained a lot of sophistication in running a political campaign," reflects Tony of Verde's experience working on the PCEF campaign. "I think that it augmented for us the emerging practice that we need to win policy wins in order to serve communities in the way that we want to serve communities. For that you need to build your chops as a political organization in the electoral realm. We've come into this space now and we're becoming experts and we're articulating how we're going to play this game in our own way that's different. That's a very powerful dynamic anytime you have a system that is monopolized for the benefit of a single group- you get inefficiency and you get groupthink and stagnation. Now we've busted that open in a big dramatic way and we won't fully see the effect of that for a number of years, but it's

already shifted the conversation. We gained increased credibility as an organization that can deliver big on building environmental wealth for our communities. We did something really big and we're carrying that into implementation, especially communities of color.”

Timeline of some key benchmarks



2018

- Measure language finalized; PAC established
- Core coalition hires attorney to review measure language ahead of submission
- Steering committee invites mainstream grassroots enviro groups to join
- Campaign files 1st Petition with City; reviewed by City Auditor & City Attorney
- Develop & begin implementing fundraising plan for campaign PAC
- Opposition campaign files ballot title challenge and Constitutional determination appeal
- Campaign files 2nd Petition with City
- Campaign receives ballot title from City
- Campaign files 2nd Petition with City
- Campaign receives ballot title from City
- County Circuit Court hearing; pack courtroom wearing green
- Judge issues favorable opinion
- Signature sheets approved by City for circulation; organize signature kit-making parties
- Campaign launch event; <8 weeks to gather 34K valid signatures; adopt semi-decentralized structure
- Collaboration for shared paid signature operation begins; first campaign staffer hired
- Campaign submits 61,728 signatures to City
- City certifies 39,755 valid signatures, qualifying it for the Nov. 6th ballot
- Shift to centralized structure; exec committee formed
- Experienced Field Director hired
- Regular targeted canvasses begin every weekend; bi-weekly media events organized
- Second poll conducted: voter support remains strong
- Regular phone banking begins 4nights/week; Campaign submits a record 307 endorsements
- Angel donor (GAP) provides critical funding
- **Election day; celebrate resounding victory**

Community, Organizational & Personal Impact of Campaign

“PCEF will lower energy bills for our communities. It will enable us to install solar panels in our neighborhoods that will provide free energy for everyone,” says Tony of some of the impacts PCEF will have on the communities *Verde* serves. “Now we have the dedicated resources that can enable these dreams to come true and give our community a sense of agency over a system that we were excluded from- that’s very powerful and something that we can keep growing long-term.”

“I gained a lot” reflects Khanh of her PCEF campaign experience. “Relationships with labor and environmental groups, communications skills, how to be an effective spokesperson, political campaign experience, coalition building, how to facilitate coalition decision-making and how important it is to keep morale up and have fun. PCEF is also going to be a game changer, especially for *OPAL*, as it opens new possibilities for work we can do, for example with community solar, community wealth building opportunities, divestment from the extractive economy and investment in a new regenerative local economy.”

Addendum (May, 2020): In January of 2020 Khanh Pham decided to run for office to represent her Portland district, one of state’s most diverse, at the Oregon State Legislature. She ran a remarkable campaign on a vision and platform that featured PCEF and [centered an Oregon Green New Deal](#); her campaign manager and campaign committee included many of the same people who had worked together to pass PCEF. Khanh went on to win her competitive primary in a landslide with 87% of the vote and is now set to become the first ever Vietnamese American, as well as the first Asian American in a generation, to serve on the Oregon State Legislature.

“I was raised in a housing project of St Louis that went bad,” describes E.D. of his childhood story. “It was meant to serve as a model, but very quickly it became an African-American ghetto. The normal redlining was at play and white flight. From my 3rd floor bedroom window I could see Peabody Coal, Monsanto and other industries. All with 24-7 bellowing smokestacks, which was a normal part of our landscape. This was the first 11 years of my life. I developed chronic asthma and was repeatedly hospitalized, about a total of 3 months out of the year, with lots of missed school days. My ears were always blocked and I didn’t hear very well. There was a lot of childhood sickness and several of my friends are now dead or have debilitating diseases as a result. I later came to realize that this was the face of environmental racism. My work with PCEF grew out of my lived experience and my desire to re-shape this reality that still exists for many communities of color today. It made me more passionate and gave me more grounding for PCEF as well as for the Environmental Justice work ahead. I was able to learn so much in such a short time and meet some awesome people, real good people, like you [Adriana] - I’m serious. Paige, Alan, Khanh, Damon- genuinely good people.”

“My favorite outcome is the ability to harness money funds for green energy,” reflects Antjuan Tolbert of the *Portland NAACP*. “It has the potential of positively impacting our community indefinitely and we get to do something that is now the envy of other cities and towns.” “It’s the first time in the history of Oregon that frontline and environmental groups came together to center frontline communities to be beneficiaries of a fund,” reflects Jo Ann. “It’s the first new money that is coming into city coffers in a long, long time- to allow these communities to be creative and get grants to build a workforce and a vision for what our energy future will look

like.” Jo Ann also describes how “working on PCEF provided [the NAACP] with an impressive opportunity to create a narrative about the climate injustice our communities are experiencing and the statewide policy changes we need to address these inequalities. The NAACP presented the [report](#) to our governor and did trainings so that our membership could go out to their communities.” When asked whether it impacted Jo Ann’s own remarkable campaign that succeeded in her becoming the first woman of color and first Black woman to be elected to Portland City Council, Jo Ann replies, “I spoke about PCEF every place I went; I spoke about it to every newspaper reporter, at every one of the 150 house parties etc. I was so proud about what communities of color could do collectively to impact the immediate future of our communities and those of generations to come.”

Although acknowledging that there were probably a few staff and volunteers in the campaign who did not feel as valued, Paige -who is used to the more typical campaign environment “where a lot of energy is wasted on negative power dynamics with extreme egos and lots of bullying and being treated like crap”- not only felt herself valued in the PCEF campaign, but describes her experience “as one of the most gratifying work spaces I’ve ever been involved in” which she credits to “white groups having to follow, which led to the positive dynamic. communities of color have so much fortitude because they face so much more oppression and bias on a daily basis, so they were way more resilient.”

“At first, I was super skeptical of the distributed decision-making structure and I’ve never worked with loaned staff before so it blew my mind to have [a couple of them] take time off in the middle of the campaign,” recalls Paige, “but thankfully I remained open enough and it worked great. I appreciated the multicultural experience; it helped me with my patience. I had been a very impatient person, always hurried to make change- with big problems you get this sense of urgency. The first things I would notice when working on a campaign is everything that was wrong, and I’d jump to immediately try to fix it. With the more deliberate process and trust-building [in the PCEF campaign], we were able to work through the difficult moments, for instance the times we were close to running out of money. The executive team was such a privilege to be with, people with so much background and the same level of expertise as I have, except in different areas. I was grateful for the opportunity to work on PCEF and for being bestowed with such trust by the campaign’s leadership for whom this initiative was so important.”

For *Portland Audubon*, *the campaign proved to be about building resilience- in ourselves, our community and the urban-nature interface*. Micah reflects on personal and organizational learning of gaining “the ability to be comfortable in being uncomfortable in doing something new and then adapting. So many other *Audubon* [chapters] focus on birds, whereas *Portland Audubon* is more unique in also focusing on the interface between people and birds. The green infrastructure piece [in PCEF] served as the hook to our organization being able to participate as much as we did. Considering how the climate crisis is increasing temperatures in urban centers where there is built landscape and not much shade- the ability to bring in a tree canopy- can bring many benefits- increased moisture, shade/cooling, clean air and water, habitat for birds and wildlife.” Joining this type of coalition work also made his organization reflect on “how conservation fits together with other social equity issues such as housing, and why lifting all of our boats up to pass something like this was so important. It was enlightening to see frontline

leadership supported at every level and see how successful this very different campaign approach ultimately was.”

Laura shares “*I was astounded at the risks we took on this campaign, since most of my campaign experience has been with the Sierra Club, and we tend to be much more risk averse. But I think this was one of the magic ingredients. The propensity to take these risks definitely came from the frontline leadership. It was a way of really understanding and living our values* around ‘[Jemez principles](#)’ - it was really huge for us in this moment to have PCEF as an example.”

PCEF campaign	Traditional campaign
Goals	
Win campaign	Win campaign
Build political power for BIPOC	
Build lasting frontline-led movement	
Protect initiative from opposition post-election	
Ensure faithful implementation of initiative	
Structure	
Intentional frontline leadership	Frontline groups not at decision-making/policymaking table
In-kind staff from steering orgs serve as campaign staff; build political campaign experience & skills of BIPOC	Contracted campaign staff only
Semi-distributed structure for signature gathering; in-kind staff and volunteer leaders organize sig gathering	Hierarchical structure; contracted field staff organize sig gathering
Pro-bono campaign consultant works with in-kind campaign manager; guides executive committee	Contracted experienced Campaign Director & Manager
Hire Communications Consulting firm to help guide in-kind Communications Director(s)	Contracted experienced Communications Director
Mix of in-kind staff and contracted staff for persuasion/GOTV phase	Contracted campaign staff only
Tactics	
Volunteers collect nearly half of signatures	Paid Canvassers collect vast majority of signatures
Include targeting of low-propensity voters in diverse low-income neighborhoods	Target only medium to high propensity voters
Neighbor-to-neighbor canvassing	
Press conferences, creative earned media events	Press conferences
Lawn signs, creative signage, light projections	Lawn signs
BIPOC are face of campaign; create diverse story bank	White, more privileged, social validators are face of campaign
Messaging guided by both polling results and goal of shifting public narrative on issues of racial equity and justice	Messaging guided entirely by polling results
Build diverse intersectional coalition	Build more issue-based coalition

Collaboration with other progressive campaigns

Minimal collaboration with other campaigns

Adapted from: Simone Crowe

Side-by-side comparisons: PCEF campaign vs Traditional campaign

Chapter 4: Post-Election Learnings & Implementation

Post-Election Learnings

Consider Equitable Leveraging from Onset

Post-election the coalition's newly formed implementation committee began discussing the concept of financial leveraging and how PCEF might be leveraged in a manner that is equitable and that increases the amount of investment in disadvantaged communities. Some in our coalition feel that perhaps this should have been discussed and written into PCEF in the first place. "It's good to set up a green bank structure quickly or else private capital will vulture in with their 8% interest bank loans," advises Brent. "I would strongly recommend adding a revolving loan fund component into the policy as a way of leveraging the funds from the onset to make PCEF-funded projects even more feasible and affordable. One doesn't have to work out every detail, but it should be administered by a third-party non-profit, probably a credit union." POC leaders are particularly concerned about the long history of exploitative leveraging by large financial institutions that has negatively impacted their communities and want to be very intentional about how we move forward on equitable leveraging. Coalition conversations are ongoing, and include discussion about Green Banks and the possibility of forming a [City-owned public bank](#), something our City has been considering.

State Preemption and the Crushing of Democracy

Well before Brent first approached Jo Ann, Lenny and I with the concept of what was going to become PCEF, he had originally thought about "a potential Ballot Initiative in Hood River," a small Oregon town 60 miles east of Portland where he lives, "but then I anticipated that it would be immediately preempted, because anything that's progressive is preempted at the state level. I thought Portland would have the wherewithal to fight state preemption. But apparently I was wrong about that."

In the wake of PCEF's resounding and hard-won victory, other communities across Oregon were excited and inspired to begin planning their own campaigns modeled after PCEF. However, less than six months later, in the legislative session immediately following PCEF's election win, *the Oregon state legislature passed legislation that included a provision that preempts local communities from effectively placing a gross receipts tax on Oregon's biggest corporations in a move that blind-sided our coalition*. The original preemption provision -which we happened to discover just days before it would have been too late to do anything about- would have also killed PCEF, were it not for the rapid response and relationships that our coalition's BIPOC leaders had with key state legislators. These legislators, in a last-minute stunt, managed to narrowly carve out an exemption for PCEF. But the remaining provision that passed removes the right of every other community in our state to raise corporate taxes for any local needs, including to address climate change and train low-income communities for family-wage clean energy jobs.

The fact that this *regressive provision passed in a legislature with a Democratic super-majority* and that our coalition could not form a unified front to stop it is worth some discussion.

Preemption has evolved into a widespread practice in state legislatures across the country that [undermines our democratic process](#) by crushing innovative local progressive policy. The Oregon legislature has a long history of using preemption to crush local municipalities' ability to progressively raise much needed revenue; the list of industries that are protected through preemption in Oregon is long and includes tobacco, fuel, alcohol, transient lodging and many more. In this case legislators tucked the preemption provision into a major priority bill for Democrats to fund statewide education through a corporate gross receipts tax. It is likely that closed door negotiations had been occurring for many months between the coalition behind the bill, big corporate interests and legislators that ultimately led to the trade-off. By the time our PCEF coalition had heard of the preemption provision, we were told by legislators and advocates alike that it was already completely baked into the bill and that the bill could only be passed as is with the preemption provision. Many BIPOC groups, including some that were members of CCC, had been working hard to pass such an education bill for years which was a top priority for the communities they represent. This temporarily created tension in our core coalition that we had never experienced before, with some in our coalition seeing it as a major threat and wanting to fight tooth and nail to try and remove the provision or at least limit the preemption, and others who, as long as we were able to protect PCEF, did not want any interference with the passage of a bill that was so important to their community and/or to their close BIPOC allies.

“Early on [organizations that are part of the progressive political establishment] told us they didn't want [our local initiative] to compete with their efforts to pass a gross receipts tax at the state level,” recalls Brent, advising that “it's good to be aware that these establishment groups may be less than enthusiastic about anyone else entering that space. They threw us under the bus, didn't even bother to call us. A simple amendment could have been made that limits the effect of the preemption to local taxes aimed at education funding, since the purpose and subject of the bill is to fund education through a state-level gross receipts tax.”

“We lost sight of where it might come from” reflects Alan “we thought it would happen in a climate-specific bill and didn't think it would happen in an unrelated bill. We could have prepared our coalition better for how to defend our initiative after we won- what threats might be, who is tracking what threats. Would we have known sooner about pre-emption? I don't know.” *“Assume that the powers that be will attempt to preempt you at the state level,”* advises Brent. “In a more hostile legislature, they may just try to entirely overturn your measure either before or after- this is their M.O. You need to make contact with progressive legislators and keep an eye out for it. *If you don't have your whole coalition on board and your coalition fractures on preemption, then you will lose.*” “But even though the Oregon legislature preempted us, there are still other ways to do it outside of a gross receipts tax,” explains Brent, which he believes also holds true for the many cities that may already have state preemptions in place on corporate gross receipts taxes.

The Fight Continues: Opposition Onslaught to Try and Weaken Measure

Our coalition anticipated that our opposition would continue their attacks post-election and threaten legal action, particularly during the most vulnerable period in the approximately 1.5-

year period between passage of PCEF and when the first grants go out to community projects. However, there was not as much capacity to spend time on preparing for what would become a continual onslaught by our corporate opposition to weaken PCEF, primarily because the coalition was heavily focused on the intensive effort to work with the City to ensure PCEF's implementation would be properly set-up and remain community-driven. Examples of the *oppositions' post-election disinformation campaign and illegal business actions* include:

- Local press stories that feature angry customers surprised by the itemization on their receipt of the 1% PCEF surcharge at one of the small handful of giant retailers that have chosen to pass along the surcharge to their consumers. This may have backfired to some degree since in at least two of the approximately four cases the retail giants are being sued through class-action lawsuits. In one of these cases [AT&T](#), which is considered a utility by the City of Portland and therefore clearly exempt from PCEF's 1% surcharge, nonetheless added the "*Portland Clean Energy Surcharge*" on their customer bills. In another case, [Safeway charged customers](#) the PCEF surcharge on their receipts for non-food items which they are allowed to do (only grocery items covered by the federal *Supplemental Nutrition Assistance Program (SNAP)*, which includes all food groceries⁵³, are exempt), but the price difference on the receipt was not reflected on the shelf price, which is what instigated a lawsuit. But the continued onslaught of stories of this nature are likely to continue at least until the first tangible projects are funded through PCEF and successfully demonstrate the positive impacts on Portland communities.
- Local press stories featuring corporate entities that feel they should be exempted from PCEF. In one such recent press story, the opposition argument claims that "Instead of affecting just big-box retailers – as advertised by tax proponents during last November's campaign – a city legal analysis [...] concludes the tax may actually be applied to nearly any billion-dollar company with sales in Portland." This statement skews the fact that PCEF's definition of retail had always been tied to the City of Portland's own definition, with explicit exemptions for food groceries, medicine and health care services, wholesalers, manufacturers and utilities. None of the campaign's official printed or online campaign materials made any statements to the contrary or even mentioned the words 'big-box'. Furthermore, our opposition funded their own research report before the election that analyzed what all could be included under PCEF using the City's definition of retail, which also includes corporate services, and which the opposition campaign then publicized a month before the election in their failed attempt to drum up public opposition to our measure in the local press and in public forums.⁵⁴ Moreover, none of the large corporations that now wish to claim exemption, bar one, bothered to even show up and testify during the City's rulemaking process that set the administrative rules for PCEF in early 2019. [Under contention](#) by the opposition and consideration by the City Council are the following entities covered under the City's definition of retail (and

⁵³ SNAP covers all foods one purchases that are meant to be prepared and eaten at home, and foods meant to be eaten without further preparation such as fresh fruits, bread or snacks. It does not cover hot food or prepared foods meant for immediate consumption.

⁵⁴ Many of the corporations who sought exemption from PCEF after its victory at the ballot box are the same ones who funded the opposition campaign, which very likely means that they surmised the 1% surcharge would apply to them.

therefore also covered under PCEF as long as they additionally meet the measure's definition of being a "large retailer"): construction companies, heavy equipment suppliers, insurance fees (such as annuities and customer fees on retirement plans), corporate fees charged on retirement plans and waste haulers.

City Council Votes for Additional PCEF Exemptions

On December 12th, 2019, the City Council voted to exempt construction companies, residential garbage haulers and retirement plans from the PCEF funds, reducing the funds by an estimated \$10 million/year (the new estimated revenue is \$44-61 million/year). In her testimony to City Council, Oriana Magnera with *Verde* made the following points on behalf of the PCEF coalition regarding these exemptions:

- The exemptions under consideration include the construction sector, residential garbage hauling, and retirement plans. These industries would be pulled out and added to the list of specific types of retail sales of goods and services that are exempt from the PCEF's 1% surcharge on billion-dollar retailers.
- The PCEF coalition's steering committee can see the unique policy arguments for exempting construction and garbage hauling, as the construction sector's jobs overlap with the workforce development goals of the PCEF and garbage hauling arguably fits under the long-standing exemption for utilities.
- Because the funds within retirement plans themselves are *not* subject to the PCEF surcharge, we see less reason for why this exemption should be considered as we have not heard a compelling and unique policy reason for why the companies providing these services cannot simply pay their fair share.
- All of these exemptions represent dollars that will not become available to communities who are on the frontlines of climate change. This is a loss. At a time when we need all hands on deck to address the crisis being felt by Portland's most susceptible communities, this is not something to be celebrated.
- We expect City Council to be fierce advocates defending against any and all future exemptions that big businesses lobby for. Corporations who are to blame for the climate crisis have long gotten away with deferring the costs of the problems they have caused, and we need investments in communities, especially low-income communities and communities of color, to weather this storm.
- There is much to celebrate about looking back on this year of collaboration together to implement the voters' will and build the PCEF program. We can be proud of this collaboration, which in many ways serves as a kind of standard-bearer for city/community collaboration in this city.
- Let us move forward together to defend PCEF from the inevitable future attacks and exemption attempts that will be made, and work hard to ensure the success of its projects and the people these dollars will serve. We will fight fiercely if any future erosion occurs.

Implementation

Shortly after the election and a post-election campaign debrief to tie up loose ends and begin processing all the lessons learned, the next critical phase of intensive work began- to ensure that the process for implementing PCEF was set up as intended by the crafters of the measure and by Portland voters. We also anticipated that PCEF’s opposition would not disappear and that the PCEF coalition would need to continue to fight to protect the measure.

Verde’s PCEF Coalition Fact Sheet provides a good brief summary of the key elements of this first phase of implementation set-up: “*The PCEF Coalition’s work did not end on election day, it shifted from winning an election to successfully and faithfully implementing the initiative* [...] Leveraging a \$143,000, 6-month grant from Meyer Memorial Trust with significant in-kind contributions from PCEF Coalition members, implementation has focused on five key areas:

- a. *Revenue*. PCEF Coalition members have worked with the Portland Revenue Division to formally adopt the initiative into Portland City Code (completed by Portland City Council action on February 21, 2019) and to develop the resulting administrative rules further defining the surcharge and taxpayer responsibilities (notice and comment period closed April 5, 2019).
- b. *Staffing*. PCEF Coalition members have worked with Portland Bureau of Planning &



City hires PCEF manager: Sam Baraso (center), flanked by Khan Pham and Tony DeFalco

Sustainability (note: the PCEF grant program is initially [housed at BPS](#)) to identify first year staffing needs, develop job descriptions and recruitment plans, design and participate in interview processes and recommend final candidates. As a result, a startup team of four staff members is already in place. Three staff members, including the Program Manager, are from Portland’s frontline communities and have strong climate policy, renewable energy and environmental justice experience. The fourth staff member managed a multi-million-dollar renewable energy grant program in Alaska.

The staff will be building the infrastructure needed for the successful implementation of PCEF and working to support the Grant Committee as well as seeking community input to develop [guiding principles](#) for PCEF and to set up the grants program.

- c. *Grant Committee Recruitment, Nomination & Appointment*. The PCEF initiative calls for a 9-member grant committee, made up of experts and community members, to make funding recommendations to the Mayor and City Council and to evaluate the effectiveness of the Fund in achieving the goals of the initiative. PCEF Coalition members have worked with City Council offices, BPS and the Portland Office of

Community & Civic Life to: Refine the details of Committee participation (e.g., time commitment, conflict of interest rules, stipends and other supports, key trainings, key program building tasks); Develop and implement an application and recruitment process (Online and hardcopy applications were available in 11 languages, general and targeted recruitment took place throughout the PCEF Coalition, 100+ applications were received – including 30+ from PCEF Coalition members); and Coordinate nomination and appointment.

- d. *Capacity Building*. Capacity building investments in frontline communities will be needed to ensure a strong and diverse applicant pool as soon as grant funds become available, and to reach the initiative’s goal that “at least 20% of the Committee’s Funds shall be awarded to non-profit organizations with a stated mission and track record of programs that benefit economically disadvantaged community members.” PCEF Coalition members have worked with BPS to: Assess current capacity in the potential grantee community (60+ surveys collected); Develop capacity building workshops (initial, daylong convening scheduled for September 18, 2019 at Self Enhancement Incorporated, a frontline community-serving Coalition member); Develop technical assistance resources (City RFP seeking technical assistance/capacity building services to be issued fall 2019).
- e. *Communications*. Program setup and implementation will require broad opportunities for frontline communities and other Portlanders to learn about PCEF. PCEF Coalition members have worked with City Council offices and BPS to: Develop and implement a communications plan, including proactive and crisis management practices to counter corporate opposition; and develop and launch online platforms: web, social, listserv(s).

The PCEF Coalition has been hard at work during these initial months of implementation, but so has PCEF’s opposition. The *Portland Business Alliance (PBA)* and its mega retailer corporations lost to the PCEF Coalition in the general election, but they remain powerful local institutions that are used to setting the City’s political agenda -- and now seek to recapture the political power and revenue they lost to a frontline community-led coalition. From pitching red herring stories to allies in the local press to reaching out to friendly elected officials to threatening legal action, they are trying to chip away at the initiative and weaken the PCEF Coalition. Successful implementation, PCEF replication and the long-term viability of our inclusive climate coalition will require:

- a. *Staff Capacity*. PCEF coalition members, especially frontline community-serving organizations, will require increased staff capacity to respond to opposition actions. More PCEF-focused FTE at *APANO*, Coalition of Communities of Color, *NAYA*, *OPAL*, Portland *NAACP* and *Verde* means more community organizing, more grassroots action, and more public advocacy for successful PCEF implementation.
- b. *Communication Capacity*. During the campaign, coalition members worked with local firms and national partners to successfully communicate the benefits of PCEF and counteract opposition messaging through social media, public events, op-eds/letters to the editor, earned media and targeted advertising. Upcoming, the PCEF Coalition needs to work with local firms and national partners to develop and implement a communication strategy to counter the opposition’s superior financial resources/to win the win, especially during this particularly vulnerable period for the initiative – the 18 months between the November 2018 election and when PCEF grants are available in summer 2020, after

which Portlanders will start to see beneficial projects happening in their neighborhoods and communities.

- c. *Strategic Planning.* The PCEF Coalition can be an enduring political force in Portland and Oregon and a model for other cities. To do so, it must transition from a collection of endorsers who came together to support a specific ballot measure to a purposeful alliance organized around common principles, chosen actions and purposeful communications. This will require working through key organizational development issues, including how we communicate, how we make decisions, how new members join the coalition, how new political issues and candidates are endorsed or opposed, and what kind of infrastructure (e.g., staffing) is needed to maintain and grow the coalition. We propose a 6-month strategic planning process, with a continued emphasis on centering the leadership of frontline community-serving organizations.”



Implementation Timeline (figure from [City of Portland website](#))

Could a PCEF Initiative Pass in Other U.S. cities? Ballot Initiatives as a Tool for Direct Democracy

Voters and communities -especially the New American Majority⁵⁵- frustrated with elected officials and the political system, see the BI process as an exciting, direct, tangible and empowering way to take action on issues that affect their lives and communities and provides them with the chance to have a say in the political process.

Some may choose to dismiss PCEF’s victory to be simply the result of a uniquely progressive electorate, however, although there is some truth to the notion of Portland being a progressive city, the reality is more complex. As described in the introduction, Portland, with its history rooted in white supremacy, can hardly be considered progressive on issues of racial equity; the result is that Portland is [one of the whitest](#) and [most gentrified](#) cities in the US. With regards to the climate crisis, it took years of continual and immense pressure from a coalition of local grassroots groups to get the City of Portland to stop plans for building a major new fossil fuel export terminal at its port and instead pass an ordinance banning new fossil fuel infrastructure and a resolution to transition to 100% renewable energy. Even with its bold commitment to this

⁵⁵ Women, BIPOC and Millennials

transition, prior to PCEF⁵⁶, the City had yet to develop any concrete plans to equitably fund such a transition. Furthermore, as Brent states: “Portland is more progressive than some cities, but you don’t have to win [a BI] by as much as we did,” believes Brent. *“We won by a supermajority, but do I think one could get over 50% in Denver, or LA or Oakland to put a tax on big corporations to do this? Take a grassroots poll- I bet one could.”*

As of 2015, 24 states have a BI process, comprising over half of the U.S. population. There are at least a dozen larger U.S. cities that, by certain standards, are considered more progressive than Portland, as well as another dozen that are within the margin of error of being [as progressive as Portland](#); many of these progressive [cities also have a BI process](#). In the end, regardless of how progressive one’s city may or may not be, one thing is for certain: *no transformational progress on climate, economic or racial justice can be made without building the type of large, diverse and intersectional coalition that the PCEF campaign managed to build from the ground up, and that was foundational to its success.*

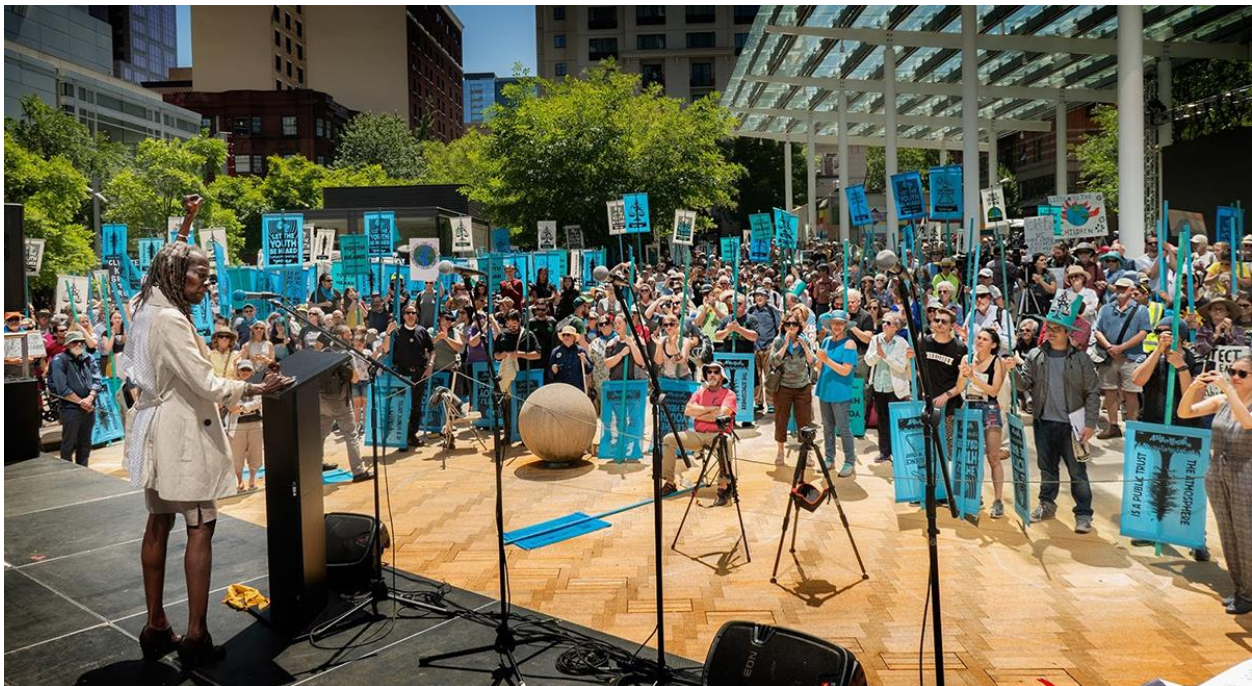
A Template for Change: PCEF as a Local Model for a *Green New Deal*

“Local work, national influence, global impact...The way that PCEF allocates \$50-70 million per year through this new community-driven process will set a precedent for national policy and programs, like the Green New Deal.” – Jeremy Hays, co-founder and chief strategist for state and local initiatives, Green For All

PCEF’s victory in the 2018 midterm election could not have been more timely, and is likely an uncoincidental reflection of the larger shift in the national political landscape. An article published the day before the election in *The Nation* magazine titled [How Progressives Can Make Change on Election Day- No Matter What Happens with Congress](#) noted: “Throughout the country...progressive ideas are on the ballot this Tuesday, and at least a few of them could find their way into lived policy [...] taken together, they reflect an encompassing progressive agenda, a map for social, economic, and even environmental change at a time when progressives have little ability to move the needle on the national stage [...] [Win or lose,] almost all will go on to inspire other cities to try the same.” The article goes on to alert readers of the “must-watch local votes”, listing “PORTLAND, OREGON: A CLIMATE-JUSTICE TAX” at the top of its list of 13 ballot initiatives and calling it a “first-of-its kind tax” and “an idea whose time has come: a tax on the richest retail corporations to pay for clean energy that will benefit everyone.”

⁵⁶ PCEF will play a significant role in helping the City reach its 100% renewables resolution goals, but much more needs to happen at all levels of government to be able to fully implement the goals, including additional equitable sources of funding and investments, regulatory changes and budgetary prioritization.

This shift in the national political landscape in the 2018 midterm election saw more people of color, women and LGBTQ -many of them younger as well- run as candidates for local, state and federal government than ever before. In Portland, with its long history of white supremacy, Jo Ann Hardesty -one of PCEF’s earliest and biggest champions- became the first woman of color and first Black woman to be elected to Portland City Council. The 2018 election also ushered in the most diverse group to ever be elected to Congress in U.S. history, making up 60% of newly elected congressional representatives. This new wave of the *New American Majority* saw Alexandria Ocasio-Cortez (AOC) elected to Congress, who became a key architect and champion of the newly conceptualized *Green New Deal (GND)*⁵⁷. The *GND* was first popularized immediately after AOC first stepped into the halls of Congress, supported by the youth-led *Sunrise Movement*.



Jo Ann Hardesty addressing youth climate rally

Photo credit: ©Rick Rappaport

Although PCEF was conceived well before the concept of a GND became nationally popularized, it presents serendipitous similarities. “In many ways PCEF is a synthesis of the key concepts of a *GND*” maintains Jenny. “It presages a lot of those concepts. It’s the first example of a policy that explicitly addresses community development and climate and is something tangible that a local government can do.” “When I compare principles of AOC’s *GND*, we can map one to one each principle,” considers Damon, “so in many ways this is our city *GND*.” “[With PCEF] we put together a local GND model for many municipalities,” describes Paige, “for a GND campaign to work, one needs to also provide technical assistance to lift up

⁵⁷ The GND is a [10-year plan to mobilize every aspect of American society](#) to 100% clean and renewable energy by 2030 and a just transition for both workers and frontline communities. The GND includes legislation aimed at advancing the interconnected issues of climate, environmental, racial, economic, food and [housing justice](#).

communities left behind, so that they can be successful. [The PCEF model] transfers political skills to frontline communities so they can craft their own solutions and win.”

In addition to being a model for a city-level GND, Khanh points out that “[PCEF is] definitely a model for a statewide Green New Deal, including its funding mechanism- the questions of who will benefit and who will pay for a statewide Green New Deal.” Furthermore, as Damon points out, “it’s hard to overstate the incredible value of relationship building that came from a campaign that has laid the groundwork for bolder collaboration across our state, both inside and outside Portland.” “It’s easier to go statewide now that we showed people how it worked here [in Portland] - that’s huge” concludes Jessica, adding that “Portland makes for the perfect test case; we learned from the oversights of [previous BI], and ran a love-focused rather than a fear-focused campaign.”

PCEF is seen as a model not only by leaders involved in the campaign. Larger climate movement leaders, including Naomi Klein and Bill McKibben have also recognized it as such, even before it won at the ballot box. “Big business has been in the way of common-sense climate solutions for decades, and it's time for that to stop” stated Bill McKibben about a year before PCEF would pass into law. “This initiative is a powerful reminder that the burden of this crisis falls hardest on those who've done the least to cause it and posits a future that works for all of us!” In the *State of the Climate: ‘Fossil Free Fast’* event in Washington D.C. featuring national frontline movement leaders and Bernie Sanders, Bill McKibben praised Portland’s model ordinance banning new fossil fuel infrastructure and presented PCEF as “groundbreaking” in that it is a “city-level initiative that would achieve climate *and* racial justice goals. If Portland sets this precedent, I believe it will become yet another model for cities everywhere.”

“[PCEF is] absolutely relevant to the Green New Deal, and not just at the city level. The principles of PCEF -centering frontline communities in setting the agenda, crafting climate solutions that serve communities in the way they want to be served, resourcing frontline communities- it shows a new way of doing this kind of work.” -Tony DeFalco

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The campaign victory would also not have been possible without the inspiring dedication of the staff and the hundreds of volunteers/activists that make up the PCEF community and who went all in and collected over 60,000 signatures in 8 weeks to get PCEF on the ballot and then helped turn out the vote to bring PCEF to a resounding victory. The non-exhaustive list of those I did not have the opportunity to interview, but who nonetheless collectively played an essential role in the PCEF campaign and its implementation includes: Oriana Magnera, Shawn Fleek, Bob Sallinger, Jasmine Zimmer-Stucky, Karen Swift, Jay Parasco, Bobby Hayden, Jane Stackhouse, Kelly Campbell, Mark Darienzo, Marshall Runkel, Russell Lum, Scott Shurtleff, Lisa Wright, Carol Chan, Shweta Moorthy, Tay Stone, Harlan Schober, Katie Young, Carolina Iraheta Gonzalez, Vivian Satterfield, Janaira Ramirez, María Hernández Segoviano, Huy Ong, Marcus Mundy, Robin Ye, Kyle White, Colin Kerosky, Dineen O'Rourke, Anissa Pemberton, Chris Palmer, Rick Rappaport, Donna Murphy, Wendy Kempfer, Hannah Holloway, Patrick O'Herron, Gloria Lambert, Camilo Marquez, Rev. Solveig Nilsen-Gooden, Jordan Karr-Morse/Softbox Films, Lynn Merrick, Inga Fisher, Serena Howell, Beppie Shapiro, Edith Gillis, Malin Jimenez, Madison Rowley, Ameya Marie, Ron Marson, Tyler Wagner, Carole Onasch, Derek Smith, KellyAnn Cameron, Amanda Yazzi, Dupree West, Shelby Spencer, Jenna Delaney, James Gomez, Richard Martinez, Marilee Dea, Patricia Kullberg, Bryan Brumley, Jeff Strang, Ellen Mickle, Barbara Ford, Chris Lowe, Bella Klosterman, Tim Swineheart, Isabela Hipólito, Emily Platt, Alice Shapiro, Melanie Plaut, Anaïs Tuepker, Laurie and Dave King, Michael Heumann, Patricia Bellamy, Lluvia Merello, Rob Cochran, Don and Pat Pagano.

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Appendix A

Brief Biographies of Voices Featured

Adriana Voss-Andreae, Report Author, Co-Chief Petitioner, Executive Committee
(350PDX)

Adriana's key roles in the PCEF campaign include: formation of core coalition, coalition building, early fundraising, strategic planning, co-chief petitioner, signature gathering lead organizer, volunteer team, fundraising team, media events & actions co-lead. She also served on the implementation team and authored this report.

Adriana grew up in a multi-cultural family whose lived experience spans nine countries across four continents. Her grandparents on both sides migrated to escape discrimination and persecution and she was raised by activist parents who instilled in her core values rooted in *Tikkun Olam*, a concept defined as our obligation to better the world and to live in harmony with one another; it means repairing the splits and healing the wounds within ourselves, as well as between individuals and nations. It also means to conserve and restore the environment, and to live in full awareness of the connectedness and oneness of ourselves within the world.

Adriana founded 350PDX out of her family's living room in 2013 to address the root causes of the climate crisis through building movement power from the ground up. As its founding Executive Director she grew 350PDX to over 10,000 supporters, over two dozen volunteer team leaders and six paid staff, and led the organization through a series of major climate action and policy wins, including coalition work to: pass the nation's first city-level ban on fossil fuel infrastructure development; organize successful City, County and Metro fossil fuel divestment campaigns; organize alongside teachers and youth leaders to pass the first-of-its-kind in the nation *Schools Climate Justice* resolution to remove climate change denial from *Portland Public Schools* district textbooks and direct the school district to develop a climate justice curriculum; pass one of the nation's strongest 100% renewable energy resolutions; mobilize thousands of people to halt Arctic drilling and successfully stop the expansion of fossil fuel projects in Portland and across the region.

The mother of four holds two doctorates, an MD and a PhD in neuroscience. Her background includes work in public health policy and food justice policy. Adriana sees the current climate crisis as an unprecedented opportunity to reshape our communities and our world through transformation rooted in justice and compassion. She feels honored to have served on the leadership team of the groundbreaking PCEF from its inception and is deeply inspired by the amazing community of people she had the fortune of working with to bring it to victory.

Alan Hipólito, Campaign Manager, Executive Committee (*Verde*)

Alan's key roles in the PCEF campaign include: formation of core coalition, policymaking, coalition building, campaign manager and fundraising lead. He continues to play a lead role on the PCEF coalition's implementation team.

Alan was born in New Orleans, Louisiana. His family is from Tamazunchale, in the Mexican state of San Luis Potosi, and from New Orleans. He led *Verde* as its Executive Director until 2018 and helped build three business enterprises within *Verde* focused on green infrastructure and weatherization projects that provide jobs to frontline communities typically left out of the green economy. Alan worked with *Verde* as their Director of Special Projects before spinning off a digital justice nonprofit, [My Suma](#), in July of 2020.

Alison Wiley, Volunteer Team (*EcoFaith Recovery*)

Alison's key roles in the PCEF campaign include: coalition building with faith communities, overseeing the campaign's signature validation and data entry operation and canvassing.

Alison was raised in a politically conservative, churchgoing family. She embraced the latter but not the former, quickly finding her progressive voice in writing editorials for her high school newspaper. As a Quaker, she joined her local *Peace and Justice Coalition* in the 80's, co-editing its newsletter, protesting against the wars in Central America and the Reagan administration, and committing civil disobedience for nuclear disarmament. Alison joined *Ecofaith Recovery* in 2017; she and *EcoFaith* became involved in PCEF through Lenny. PCEF resurfaced her activism and she gave herself fully to the campaign. PCEF was her first experience working in coalition-led electoral politics. Alison found it exhilarating to work with smart, passionate, diverse people to address social justice and climate change -- at the same time, in the same ballot measure. "God and Jesus love PCEF," she says happily. "She and he were celebrating, dancing right there with us on election night."

Antjuan Tolbert, Steering Committee (Portland NAACP)

Antjuan's role in the campaign includes serving on the steering committee.

Antjuan Tolbert serves as Secretary of the *Portland NAACP*. Antjuan grew up in the state of Washington, in a residence "on the poor side of the tracks" that he saw as a toxic environment and that led to his developing asthma at a young age. He later began to study the impacts that pollution and environmental racism have on communities and became involved in the *Poor People's Campaign*, which really opened his eyes to the many disparities that exist in Portland and across the nation. He is particularly excited about PCEF's ability to fund green energy projects and jobs that will positively impact his community and inspire other cities and towns to do the same.

Brent Foster, Environmental Attorney & Campaign Strategist

Brent worked with Jo Ann Hardesty to help craft the initial PCEF concept; his roles include: formation of core coalition, polling, drafting the policy language together with the coalition's

Communities of Color leadership, coordinating with outside legal counsel on legal review and edits to the measure, overseeing the paid signature gathering operation and serving as a guide on campaign strategy and planning.

Brent is a political strategist, organizer and environmental attorney who has been the chief campaign strategist on grassroots ballot measures in Oregon for over a decade, including landslide wins blocking Nestle's effort to bottle water from the Columbia River Gorge⁵⁸; banning GMOs (Genetically Modified Organisms) in Jackson County⁵⁹; defeating water fluoridation in Portland⁶⁰; stopping an LNG pipeline in Clatsop County⁶¹; and stopping a Wasco County PUD (Public Utility District) backed coal plant⁶². He was also lead author of a successful statewide bill that allowed energy efficiency upgrades to be paid for through one's utility bills.

Cary Watters, Steering Committee (*NAYA*), Campaign Communications Staff

Cary's roles in the PCEF campaign include: formation of core coalition, early fundraising and, as communications staff, preparing content for Letters to the Editor, Op-Eds, press releases and talking points as well as coordination of photography.

Cary, a member of the Tlingit Tribe, indigenous peoples of the Pacific Northwest, has over 13 years of experience in culturally specific solutions, natural resource sciences, public policy, and community planning. She has a passion for and has worked on Native gathering garden projects for the purpose of community building and for spiritual, emotional and physical health. Cary, who earned her master's degree in Urban Planning at *Portland State University*, served as Community Engagement Manager at *NAYA (Native American Youth and Family Center)* until 2018. Prior to that she was Project Manager for a 3-year climate justice campaign with the *CCC (Coalition of Communities of Color) & OPAL*. Cary currently works as Contract Equity Coordinator for the *City of Portland Bureau of Transportation*.

Damon Motz-Storey, Executive Committee (*Oregon PSR*), Campaign Communications Co-lead

Damon's role in the PCEF campaign was co-lead of Communications, which includes: messaging, developing content for campaign materials, campaign branding, email blast templates and website, social media development, managing press, coordinating and training of spokespersons and coordinating the communications team. He also coordinated health professional advocacy. He continues to lead communications for the PCEF coalition's implementation team.

Damon is the director of Oregon PSR's (Physicians for Social Responsibility) Healthy Climate Program advocating for a just transition from fossil fuel exports, fossil fuel infrastructure, and nuclear power to clean, renewable energy. He represents Oregon PSR in a variety of Pacific

⁵⁸ Ballot initiative in 2016 which won the vote with a 69% to 31% margin

⁵⁹ Ballot initiative in 2014 which won the vote with a 66% to 34% margin

⁶⁰ Ballot initiative in 2013 which won the vote with a 61% to 39% margin

⁶¹ Ballot initiative in 2008 which won the vote with a 67% to 32% margin

⁶² Ballot initiative in 2007 which won the vote with an 85% to 15% margin

Northwest coalitions and coordinates Oregon PSR's climate lobbying efforts to ensure that public health is well-considered by environmental policy makers at the local, state, and federal levels. Damon has been with Oregon PSR since 2016 where he was originally a Quaker Voluntary Service Fellow after graduating from Haverford College. Working on climate action from a human health perspective is deeply personal for Damon, whose mother lives with a chronic health condition that is exacerbated by extreme summer heat. He notices also that economic opportunity for his peers in the LGBTQ+ community is limited by family and workplace discrimination, especially for trans and nonbinary people and queer people of color. A life-long Quaker from Colorado, working in his current position on issues of climate justice is a dream come true for Damon.

Rev. E.D. Mondainé, Co-Chief Petitioner, Steering Committee (*Portland NAACP Branch*)

E.D.'s key roles in the PCEF campaign include: Co-chief petitioner and spokesperson.

Rev. E.D. Mondainé is President of the *Portland NAACP* and *Alaska Washington Oregon State Area Conference Vice President*, senior pastor at *Celebration Tabernacle Church*, small business owner of *Po'Shines Cafe*, public speaker and civic leader. He also brings decades of experience working on building African American community through faith and spiritual practice, entrepreneurship, civic engagement and racial justice. E.D. brings a perspective as someone whose passion for PCEF stems from his firsthand experience growing up with environmental racism and his desire to re-shape this reality.

Gregory Monahan, Volunteer Team (*Oregon Sierra Club*)

Gregory's roles in the PCEF campaign include: setting up systems for signature gathering, Organizing *Oregon Sierra Club* volunteers for signature gathering/field work.

Gregory was raised on the east coast and then moved to Virginia where he founded and ran a general contracting company for 17 years. After a two-year stint as business manager for a private school, he went on to earn a PhD in electrical engineering and moved to the Portland area, Oregon, to work as a high-tech design engineer for 12 years. He later also began teaching engineering at *Portland Community College* and incorporated sustainability and climate change into the required curriculum of PCC's Engineering Transfer Program. After receiving some initial pushback from the department, Gregory was given the green light and he proceeded to create and update materials for 7 years. Gregory later came to a realization that climate activism was more important than teaching, so he retired from his engineering job and teaching and devoted himself full time to climate activism as a volunteer organizer at the *Oregon Chapter of the Sierra Club*.

Jenny Lee, Executive Committee (CCC), Communications Director

Jenny's key roles in the PCEF campaign were as a spokesperson and Communications Director, which included: overseeing all campaign communications, messaging, managing social media

content and online advertisement, representing the PCEF coalition in public forums, live debates and press interviews. She continues to serve on the PCEF coalition's implementation team.

Jenny worked as Advocacy Director at CCC (the Coalition of Communities of Color), a cross-cultural alliance of culturally specific organizations engaged in collective action for racial justice. Jenny later joined APANO for one year as their Advocacy Director in May 2019 before returning to CCC as its Deputy Director in 2020. Previously she was the Housing Policy Director at *Neighborhood Partnerships*, where she helped convene the Oregon Housing Alliance. She also spent four years as the Public Policy Director for *Hawai'i Appleseed* in Honolulu, where she engaged in legislative advocacy, litigation, and policy research on a wide range of social and economic justice issues. Jenny grew up primarily in Beaverton, Oregon and spent a year serving as an AmeriCorps member at a *SUN School* in Southeast Portland. Jenny holds a J.D. from *Harvard Law School* and a B.A. from the *University of Oregon*. Working on climate justice also feels personal to Jenny as her father's family is from the subtropical island of Taiwan that is already very impacted by storms and rising sea levels exacerbated by climate change. Other than some volunteer canvassing shifts, PCEF was Jenny's first campaign.

Jessica Beckett, Campaign Field Director

Jessica's role in the PCEF campaign was as Campaign Field Director in the critical final two months of the campaign, which includes: developing persuasion/GOTV field strategy, setting up the systems for canvassing and phonebanks, hiring and managing field staff, managing and running the canvassing operation and coordinating with the steering committee to organize canvassing events.

Jessica is an organizer of people and a champion for justice. Born in Denver and raised on the glorious Hood Canal in Washington, her formative years were immersed deeply in the many wonders of nature. Jessica's organizing career began in high school, where she fought the administration to retain a curriculum that honestly addressed America's role in the Vietnam War. At 19, she became a National Delegate to the 2004 Democratic National Convention for Congressman Kucinich, igniting her passion to change our political and social systems. After serving on numerous political campaigns and non-profits, Jessica was hired by the PCEF campaign to serve as its Field Director. As a woman of color, she did not feel welcome in environmental movement up until her work with the PCEF campaign, which is the first time she experienced feeling truly welcomed. PCEF is also the first campaign in which Jessica experienced a community who shared her values of collaboration and heart, with people continually working to better themselves, something she feels is all too rare in electoral campaigns that are typically fraught with emotionally exhausting power struggles. She feels grateful to have been part of the PCEF campaign which she sees as brilliant in both concept and coalition, addressing *the* issue of our generation and time. After the campaign, Jessica went on to serve as *350PDX's* new Executive Director for a year and is currently serving as Oregon Sierra Club's Political Director.

Jo Ann Hardesty, Steering Committee (*Portland NAACP Branch*)

Her roles in the PCEF include: policymaking, leading the early core coalition, coalition building, developing messaging and early outreach materials, early campaign planning and political

strategy. As a Portland City Commissioner, Jo Ann now sees her role as “protecting the integrity of the vision that the community came up with. It’s clear that this has to be a community-led effort, but the City is responsible to ensure it goes to benefit the people it is supposed to.”

Jo Ann was born in Baltimore to a family of ten children with a stay-at-home mom and a longshoreman dad. As a child she was an avid reader and wanted to see the world, so after high school she joined the Navy and was stationed in the Philippines while traveling the world by ship. She then spent a few years in the Bay Area before making Portland, Oregon her permanent home. After her first job with the *Black United Fund*, she worked for Multnomah County Commissioner Bev Stein, where she learned that elected officials didn’t have to know everything; they just had to listen to good people who were interested in making the city better for *everyone* and use that to make public policy. This led her to run and serve in the Oregon House of Representatives for six years. She later served as Executive Director of *Oregon Action*, a multi-racial organization dedicated to advancing economic justice in Oregon and in 2015 became president of the *Portland Branch of the NAACP*. Jo Ann became involved in the PCEF from its earliest conception. About a year into the early PCEF discussions, she was hired by *350PDX* as a consultant for the PCEF core coalition so that she would have more capacity to further the goals of the coalition. In 2017, before the launch of the PCEF campaign, Jo Ann left the PCEF coalition to run her own successful campaign to become the first Black woman (and first woman of color) to serve on the *Portland City Council*.

Jon Jensen, PCEF endorser (IBEW Local 48)

Jon represented the Building Trades in discussions with the PCEF coalition

Born in Idaho, Jon is a second-generation union electrician. He moved to California to get his first union job because he wanted to work in the renewable energy sector. He then moved to Oregon where he has been working as an electrician for the past 13 years and as an organizer for IBEW Local 48. For the past two years he served as IBEW’s Political Representative, where he was responsible for political outreach, campaigning, endorsements and statewide and local policy. A skeptic at first, Jon is now an ardent supporter of PCEF.

Khanh Pham, Executive Committee (*APANO*)

Khanh’s key roles in the campaign include: formation of core coalition, campaign strategic planning, spokesperson and media events & actions co-lead. She continued to play a lead role on the PCEF coalition’s implementation team.

Khanh Pham joined *OPAL Environmental Justice* in 2019 as their statewide Environmental Justice Organizing Director. Prior to that she served as Director of Immigrant Organizing and Environmental Justice Manager at *APANO* (the *Asian Pacific American Network of Oregon*). Khanh brings years of experience and a deep commitment to Environmental and Climate Justice, plus decades organizing and overseeing campaigns, to the movement space. Khanh is Vietnamese American, and that identity shapes a lot of how she sees the world and how she understands U.S. imperialism. This has driven her to want to understand the systemic causes of inequality, both globally and locally. She has beloved family and friends in Vietnam, and so

when folks talk about the Global South being the most impacted by climate change, they're not just an abstraction to her, but people who she loves and is willing to fight for.

Khanh is committed to building a movement where you don't have to be a paid staffer to be able to organize in your community and develop as a leader. She describes this moment in time as one of transformation: economically, socially, ecologically, and politically, with both profound dangers and opportunities to unite people around a vision for a different world. Khanh says she feels called to do everything possible to bring about the real transformations we need in our economy and society in order to preserve a habitable planet for our children and ourselves. Khanh helps lead the *Oregon Just Transition Alliance*, a frontline-led statewide alliance to develop a collective vision and plan for an *Oregon Green New Deal* that stops the expansion of fossil fuel infrastructure, while creating the jobs that build the next renewable, just, and caring economy. In 2020 Khanh is set to become the first Vietnamese American, and the first Asian American in a generation, to serve in the Oregon legislature. She calls PCEF a life-changing experience because she saw our ability to make demands of the most powerful corporations and win.

Laura Stevens, Volunteer Team

Laura's key roles in the campaign include: field volunteer organizer, mentorship of volunteer leaders.

Born and raised in Portland, Oregon, Laura was first exposed to the fight for environmental justice after college when she traveled as an international observer to Intag, Ecuador where peasant farmers were fighting a copper mining project that would have displaced their families and put the cloud forest at risk. This experience influenced her decision to become an organizer, which she has been doing for over a decade now, including labor organizing, fighting pollution and fighting for clean water. Laura went on to become Senior Organizing Representative for national Sierra Club's Beyond Coal Campaign, where she led campaigns against coal-fired power plants in the South and against coal export terminals across the Pacific Northwest. She also contributed to getting Oregon's Clean Electricity and Coal Transition law passed. She feels that mainstream environmental organizations ("big greens") have long struggled with centering climate justice in their work, which is what attracted her to volunteer with the PCEF campaign with its clear frontline BIPOC leadership. Laura's passion lies in movement-building, and empowering leaders and communities to work for climate justice.

Lenny Dee, PCEF Executive Committee (350PDX)

Lenny's roles in the PCEF include: formation of core coalition, coalition building/partnership engagement lead, policy research, signature gathering lead organizer, volunteer team and political strategy. He continues to play a lead role on the PCEF coalition's implementation team.

A consummate networker and lifelong activist, Lenny has led campaigns behind the scenes that resulted in major changes to Portland's urban renewal policy and climate change resilience. Lenny sees the climate crisis as an "all hands on deck" situation that will change everything. This drew him to 350PDX, where he served as a co-founding Board Director and volunteer team leader for five years, until 2017. For the last 12 years he has also headed *Onward Oregon*, an online activist group whose emails go out to over 40,000 Oregonians on state and local issues.

Lenny played an instrumental role in the PCEF coalition from its earliest days and, since retiring from his job of 22 years as Sales Director of a software company, he has been volunteering full time on the PCEF campaign for the past 3+ years.

He believes the PCEF model and movement building can help inspire a transformation of our country and build a whole new clean energy economy.

Maggie Tallmadge, Steering Committee (*Coalition of Communities of Color*)

Maggie's roles in the PCEF include: formation of core coalition, policymaking and early strategic and campaign planning.

Maggie is a Citizen of the Cherokee Nation. Her grandmother was born in the Cherokee Nation of the Indian Territory of Oklahoma where, in 1907, one of the largest oil discoveries was made; the oil boom led to an influx of whites seeking to turn a profit and to the Indian Territory's incorporation into the U.S.. Growing up in Texas and California, her father instilled in her the values of the Cherokee people, including the importance of working to better the community. She first moved to Oregon to work at a law firm working on renewable energy and volunteered with *Verde*. She credits Tony DeFalco for raising her awareness on the connections between economic development and environmental issues, which has been her focus ever since. Maggie went on to serve as the Environmental Justice Manager at *CCC* (the *Coalition of Communities of Color*), an Oregon alliance of 18 culturally specific community-based organizations, and established its Community and Economic Development program while designing and leading legislative, electoral and *Public Utility Commission* policies and campaigns, including carbon pricing, community solar, Renewable Portfolio Standards, grid modernization and tax policy. While working with *CCC*, Maggie became involved in the PCEF. It was Maggie's work with the PCEF and on the City of Portland's 100% resolution that inspired her to pursue a Masters of Environmental Management at the *Yale School of Forestry and Environmental Studies* where she is currently studying energy and utility policy, energy finance, cleantech and social enterprise as tools to build wealth and political power in tribes and low-income communities of color.

Mark McCleod, Volunteer Team (*350PDX & Oregon Sierra Club*)

Mark's key roles in the campaign include: volunteer leader and top canvasser.

Mark taught politics in the College of Professional Studies, University of San Francisco and owned/operated three great SF Bay Area restaurants. Mark has been involved in progressive politics all his life, both academically as well as in his activism. His activism includes: involvement with the Peace and Freedom Party in California in the early 60's and 70's; demonstrations against Lawrence Livermore Laboratory; and, since 2001, fighting for climate justice. Mark moved to Portland in 2014 and has been a volunteer leader with both *350PDX* and *Oregon Sierra Club*. PCEF had a major impact on Mark; in particular the power that resulted from building a coalition structure across racial and cultural lines was eye-opening to him. He was impressed by the sheer people power that the PCEF campaign was able to generate, including the thousands and thousands of conversations with Portland residents, and the resulting campaign victory.

Martha Balshem, Volunteer Team Leader (*Portland Branch NAACP*)

Martha's role in the PCEF includes overseeing the campaign's petition data entry team.

Raised on the east coast as a “red diaper baby,” Martha grew up to be an activist in the 60s in the *Students for a Democratic Society*. When the 60s movement was crushed, she went on to earn a PhD and became a professor of anthropology and sociology at *Portland State University*. Shortly after she retired, her husband fell sick and passed away a year later. In recuperating Martha found the *Portland NAACP* and was inspired by Jo Ann Hardesty’s dynamism to volunteer on her primary campaign and then on PCEF, her first environmental campaign. She views her experience with PCEF as an amazing gift that changed her political perspective and opened her up to a whole life that she had been missing.

Micah Meskel, Steering Committee (*Portland Audubon*)

Micah’s key roles in the campaign include: volunteer organizer, volunteer team, signature gathering lead events coordinator, lawn sign canvassing lead organizer.

Micah was born and raised in Portland and attended the University of Oregon and earned a degree in Economics. He began volunteering with *Portland Audubon* at the Wildlife Care Center in 2010 and has served in a variety of staff roles within the conservation and care center programs before becoming the Activist Program Manager in 2018. In his current role, Micah manages *Portland Audubon*’s activist program, works on a variety of local and statewide policy issues, and represents *Portland Audubon* on various committees and coalitions.

Having worked in conservation for nearly a decade, Micah recognizes the existing disparities in Portland and how some communities don’t have access to parks and natural spaces with wildlife. He is glad to see the recent trend in the conservation movement around the need to make our environmental wealth more equitable and accessible; this is what really excited him about working on the PCEF campaign.

Paige Richardson, Consultant

Paige’s role in the PCEF campaign was as guide and mentor on nearly every aspect of the campaign including: guide to campaign manager and executive committee, advisor on campaign strategy and planning, setting up of *Political Action Committee* and compliance, guiding signature gathering validation process, coalition building with political establishment, polling, messaging, and hiring of campaign staff.

A 12th generation Appalachian and 4th generation election engineer, Paige recalls how her great grandfather, a sheriff, helped the Republican party win Appalachia. The West Virginia that Paige grew up in was one of the poorest states in the nation and a state that had aggressive segregation and racism. She feels fortunate to have had parents who were civil rights activists and sent her to a school outside her neighborhood that was the most integrated school in the region. Her family story is also shaped by the long history in Appalachia where mine wars were being fought and coal companies hired national security guards to beat up or murder striking migrant miners. Her parents were heavily involved in local politics and she remembers spending a lot of time in Democratic headquarters at an early age. In addition to coal mining, her community was the center for petrochemical manufacturing (including nitroglycerin and many of other chemicals used in warfare). Paige speaks of how the big powerful profit-driven corporations turned the

beautiful pristine region of Appalachia, with its huge biodiversity, into one of the most polluted places on the planet.

Her father had started out as an engineer for *Union Carbide*, but quickly realized they were making the water and air inhospitable and went on to serve on the first clean air commission in the city. Paige remembers recruiting her friends and going door to door for her dad when he ran for state legislature and won, having listened to and allied with the miners. Paige also got involved in a successful candidate's campaign for governor that her mother worked on staff for. Both her parents went on to serve in the administration of the newly elected governor, with her father serving as chief of staff.

In the 80's, both her parents were blacklisted for their work by the incoming governor, so they couldn't get any work in West Virginia, but they never let that stop them. Paige's mother eventually went on to become Director of Medicaid for the federal government under President Clinton where she helped create and implement the *Children's Health Insurance Plan*. Her parents demonstrated to Paige how successful policy could be made in the most difficult of circumstances.

As a young woman, Paige got elected to student government and was recognized by the LGB Student Union. After college, Paige worked as an internal staffer for a Congresswoman, but felt the pace of change was too slow. For a decade, she went back to campaigning mostly for members of Congress in highly targeted races across 22 states. Feeling that candidates would often sell out once elected, and sensing the increasingly paralyzing political gridlock, Paige began working on Ballot Initiatives and has since managed 20 local and statewide BI campaigns. Wanting to do more on the policy issues that she most cared about, and realizing that Oregon shared a lot of the same history of racism as where she grew up and that there haven't been any gains made for BIPOC, she was drawn to work on the PCEF campaign despite the campaign's inability to afford her services at market rate. She sees PCEF as one of the most gratifying work she has ever been involved in.

Simone Crowe, Campaign Field Staff Organizer

Simone's key role in the PCEF campaign was as a lead Field Organizer.

Simone was raised in Maine with a grandmother who deeply influenced her growing up, and who was renowned for her peace and anti-nuclear activism and Non-Violent Direct Action for climate justice. As a college student, she first became politically engaged in reproductive and immigrant rights. In her growing awareness of the privilege she held in society, she felt it a duty to invest her energy in economic justice. After working for a few years in anti-hunger, she began feeling an overwhelming sense of urgency about the unfolding climate crisis and was grateful to have the opportunity to join the PCEF campaign as hired staff. She sees the PCEF as an amazing forward-thinking solution that speaks to racial and social justice and to her love for the planet. The PCEF campaign introduced her to the climate justice community and opened her eyes to local environmental issues, organizations and new organizing tactics, and she cherishes her experience. Simone is currently a student at the *Pacific Northwest College of Arts* earning her *Master of Fine Arts* in Collaborative Design, skills which she plans on using for social and climate justice causes.

Tony DeFalco, Steering Committee (*Verde*)

Tony's key roles in the campaign include: Coalition building, lead fundraiser and spokesperson.

Tony grew up in southern California and identifies as Mexican American. His identity is also tied to the outdoors, where forests and ocean are places he turns to for spiritual recharge. Tony believes that the protection of and access to natural places should be a fundamental right for all. In college, Tony became increasingly aware of the suffering caused by American foreign policy and became engaged in issues of social justice. It was only when he later joined *Verde* that he found a home for bringing together social justice and environmental protection.

In 2018 Tony became *Verde*'s Executive Director, where he continues to be a leader in the movement to rewrite the environmental agenda in Portland to build wealth with low-income communities of color. Prior to stepping into the ED role, Tony worked at *Verde* as the Deputy Director as well as Living Cully Coordinator. His expertise in community economic development, environmental protection and sustainability spans 20 years of working locally and nationally in environmental advocacy, coalition building and policy advocacy. His current focus includes redevelopment of a landfill into a park in a low-income neighborhood in Portland and strengthening communities of color and low-income communities in deriving economic benefit from environmental investments. For Tony, the PCEF campaign was a wonderful coalition space to work in and was a high-water mark both for him and for the diversifying of the environmental movement in Portland and beyond.

Trevor Kaul, Steering Committee (*Oregon Chapter of the Sierra Club*)

Trevor's key roles in the campaign include: securing resources (office space, in-kind staff etc.) and fundraising.

Born in San Diego, Trevor and his family moved to a farm in Illinois when he was in high school and everything he thought he had wanted to do changed. Trevor is a graduate of Westminster College where he received a B.A. in Sociology, Anthropology, and World Religions. It was in college that he was first drawn to political organizing and campaigns that had shared visions of bettering the world and went on to work for groups such as *Public Interest Network*, and *Human Rights Campaign (HRC)*. For a short time, he worked with communities of color at service organizations before moving back to grassroots organizing and advocacy at the *Sierra Club* in order to tackle the root causes of environmental injustice. Trevor has been a nonprofit leader for over 18 years. For 5 years he served as Director of the *Washington Sierra Club* where he helped transform a small organization into a leader in the environmental community by building high-performing teams, establishing diverse partnerships, and tripling fundraising. In national leadership roles at *Taproot Foundation* and *Coaching Corps*, Trevor applied systems-oriented analysis of organizational behavior to recommend enhancements to program design and performance management. As a consultant with *Grassroots Solutions* and *Venture Leadership Consulting*, Trevor partnered with clients to provide strategic program evaluation, theory of change implementation, and interim leadership services.

Trevor returned to the Pacific Northwest to serve as Executive Director of the *Oregon Sierra Club*. With his heart in advocacy, a head for strategic management, unshakeable faith in the power of volunteerism, and a deep love for wild places he can't imagine a better home. Trevor

sees PCEF as having been an amazing opportunity for *Oregon Sierra Club* to embrace climate justice work.

Willy Myers, PCEF endorser (Executive Secretary-Treasurer for *Columbia Pacific Building Trades*)

Willy represented the Building Trades in discussions with the PCEF coalition.

Willy was born in an old rural mill town in Oregon to a Nebraskan father and an Arkansan mother. His parents divorced when he was young and moved to the farmlands area of Salem where he grew up. He was 18 when he first got into construction at a sheet metal shop. He worked for 8 years in non-union jobs before helping organize his workplace into a union shop. He then became an organizer and later an elected business agent for Sheet Metal Workers Local 16. He went on to be elected Executive Secretary-Treasurer for *Columbia Pacific Building Trades*, an umbrella organization of 25 unions that represent some 20,000 construction workers employed by more than 2,000 signatory contractors, a position he has held for the past 4 years. He considers himself a champion for worker justice and worker rights. His community activities include sitting on the state's Prevailing Wage Advisory Committee and the Metropolitan Alliance for Workforce Equity. Willy sees PCEF as an opportunity to build a union career pipeline; he is excited about Portland being the first city to accomplish creation of clean energy jobs that set high standards, and hopes it will be a model for other parts of the country.

Appendix B

City Council Strategy vs Ballot Initiative Strategy: Key Deliberations

Pros of a City Council Strategy

- **Strong collective experience in legislative strategy.** Our individual organizational and collective coalition experiences and strengths were strongly rooted in a grassroots-based approach to legislative strategy, and our coalition members had accomplished several major recent legislative victories. On the other hand, our core coalition's organizations had no experience running a BI or political campaign.
- **Less political risk.** If we lost a BI campaign by a large margin, we would risk losing political power and close the door on a legislative strategy for a long period.
- **Less expensive.** A legislative strategy would be far less expensive and less time intensive than a BI strategy, thus preventing our limited organizational resources from being strained excessively.
- **Existing relationships with City Council.** Organizations around this table are well respected, so we believed that City Council might take us seriously.
- **Growing political will on climate at City Council.** We sensed there was a growing appetite for an environmental agenda at City Council which some of our organizations had helped to foster, allowing us to capitalize on this increasing

political will; it could be seen as a major policy win for the new mayor and Council, especially since the City had a long history of doing a very poor job in the areas of equity and racial justice.⁶³

- **Work with City to strengthen policy.** Moving things through the legislative process would allow us to communicate more closely with and tweak the policy with the policy's implementers in City government.
- **Faster deployment.** A legislative strategy could be more rapidly deployed, and we saw the opportunity of coordinating the timing with other upcoming climate justice events/actions.

Pros of a BI Strategy

- **Maintain control over initiative/Prevent initiative from being co-opted by City Council.** BIPOC groups sensed that they currently have limited political capital in comparison with powerful Business interests, so if we had gone with a legislative campaign, the City might have proposed trade-offs and may have co-opted the initiative to be all things to all people, leading to weakened policy. Running our own BI gave us full control over the language. In addition, we were also advised that we could lose control of our initiative entirely if we gave it to City Council, which would then have the authority to postpone a vote until the following election season in two years' time.
- **Build political skills.** Running our own BI campaign would build all of our political campaign skills, with the particularly important outcome of increasing these skills in frontline/BIPOC groups. For base-building groups, it could also help galvanize volunteer energy and further build our base of supporters and movement activists.
- **Increase political power of frontline communities.** If we succeeded in our BIPOC-led BI campaign, it would significantly increase the political power of BIPOC groups.
- **No reliance on risk-averse elected officials.** After having had some initial discussions with City Commissioners about our initiative concept, it did not seem likely to any of us that we would have the necessary votes in City Council to either vote in favor or refer it to voters, though we saw no downside in continuing the conversations.
- **Community groups more popular with public than City Council.** We concluded that ultimately, regardless of which strategy we chose, the initiative would likely end up on the ballot, with the only major difference being who would be referring it to voters. If we succeeded in getting City Council to refer it to voters, then we would still have to mount a political campaign to convince voters to back up the City; If we succeeded in getting City Council to pass the policy themselves, then Big Business opposition would likely challenge the City by referring it to the ballot themselves and we would have to mount a political campaign to help defend what would be considered by voters as the City Council's initiative. "In part, what motivated [our decision] was the polling analysis" recalls Alan. "Even if we got three out of the five votes [on City

⁶³ For example, Portland ranked toward the bottom among U.S. metropolitan cities with regards to women-owned and minority-owned businesses

Council], which would be challenging, it would almost certainly be referred to the ballot, it would be easy [for the opposition] to get voters to think it was a City thing, instead of a Community thing.” Community groups with a long history of representing and serving disadvantaged communities poll as significantly more popular with the public than City Council, so if we would have to mount a political campaign in any case, then the initiative campaign might as well come directly from our coalition’s community groups.

City of Portland vs Multnomah County: Key Deliberations

Pros of County

- **Fewer signatures needed to qualify.** We would need to collect only 17K signatures to qualify at the County level (as opposed to ~34K signatures at the City level)
- **Opportunity to reach most disenfranchised voters.** We would be reaching some of the County’s most struggling communities pushed through gentrification to living further out; this would allow for more authentic relationship-building and organizing out of the lower-income and more diverse neighborhoods of East Portland and East County

Pros of City

- **More progressive electorate.** Portland skews more heavily toward a progressive voter turnout than the County (at the County level we would need to persuade more voters that voted against M97⁶⁴, the recently failed statewide gross receipts tax measure- although a majority, 57%, of County voters did nonetheless vote in favor of M97).
- **Smaller, more manageable, geography for canvassing.** The larger and more sprawled-out geographic area that covers a County election would make it more challenging to navigate for canvassing.
- **Relationships with electeds.** Up until this point we had done more outreach to City Commissioners than County Commissioners, so there were less likely to be surprises.

Primary (May) vs General Election (November): Key Deliberations

May Pros

- **Smaller target voter pool & lower cost.** May primaries have significantly smaller overall turnouts (in Portland 15-20% less than turnout in recent November

⁶⁴ Measure 97 (M97) was an unsuccessful 2016 statewide Oregon BI that would have imposed a 2.5% gross receipts tax on large corporations with Oregon sales exceeding \$25 million in order to fund education, health care and senior services. The battle was largely fought between a labor union-led coalition and Democratic establishment that supported the measure vs large corporations and Industry Associations, including the *Portland Business Alliance* that opposed the measure.

general elections), which means a smaller target audience for campaign advertisements and/or mailings translates into a lot less costly of a campaign (possibly up to 10 times less).

- **More progressive electorate.** Recent data showed that May elections attract a more engaged and progressive electorate in Portland (and fewer voters in Portland districts where M97 did most poorly).
- **Less crowded ballot.** Fewer campaigns competing for limited voter attention span and less likely for voters to be confused with other messages/ballot measures.

November Pros

- **Opposition more distracted.** Opponents may be more distracted by other priorities in a November election.
- **Coalition less distracted by other legislative priorities.** With a May election, we would be up against the state legislative session that would potentially include carbon pricing legislation that some core coalition groups were involved in as well as other legislative priorities that are particularly important to BIPOC core coalition groups; this would decrease organizational capacity within our coalition.
- **More opportunity for collaboration.** General election provides larger opportunity to collaborate with other progressive campaigns but would require more financial resources.
- **More public engagement.** General elections generate more widespread interest.
- **More diverse electorate** turnout for general elections.

Appendix C

Field Campaign by the Numbers

Below is an overview summary of the breakdown in numbers of the highest value contacts with voters through canvassing and phone banking:

Phase 1 field campaign (signature gathering):

39.7K conversations with valid petition signers (of total 60K+ signatures gathered);

400+ volunteer signature gatherers; plus paid signature gatherer operation

89% petition signer turnout

Phase 2 field campaign (targeted persuasion/GOTV):

1.7K pledge card signers;

1.4K support votes counted;

92% turnout

Canvassing (Doors; high impact):

- 13K unique conversations;
- 300 canvassers;
- 800 canvass shifts;
- 3.3K total canvass hours;
- 31K doors knocked;
- 53K attempts (includes homes with multiple voters);
- 24% contact rate;
- 11K support votes counted (with conversation);
- 84% turnout

Phone banking (medium-high impact):

- 5K unique conversations;
- 190 phone bankers;
- 466 phone shifts;
- 1,600 total phone hours;
- 50K dials;
- 10% contact rate;
- 4.5K support votes counted;
- 89% phone turnout

Total direct contacts/unique conversations phase 2: 20K

Total direct contacts phases 1 & 2 with (valid) petition signers, pledge cards, doors, phones: 59K

In addition to the direct voter contact numbers above, our campaign also included roughly:

- 35K literature drops at voters' doors (without direct contact, so low impact);
- 500K mailers delivered (low-medium impact)
 - 30K *PCEF* only mailer;
 - 130K across two *PCEF* joint mailers with *Honest Elections* campaign;
 - 400K across four progressive slate mailers
- 2K targeted handwritten GOTV postcards (medium-high impact; Jessica explains: “are proven to turnout more voters when handwritten, but increase volunteer labor and staff coordination”);
- 5K texts from text banking (medium impact; per Jessica: “texting has shown decreasing effectiveness over time, but the scope of people we reached may skew these numbers.”)

Social media posts, online ads, email blasts, Op-Eds, LTEs etc. are included in Communications numbers.

Appendix D

Communications by the Numbers

Press Coverage

In the run up to the launch through the submission of petition signatures there were just over a dozen media stories covering our campaign, including at least:

- 3 on community radio;
- 8 in major local newspaper stories;
- 2 on mainstream TV

In the final two months of the campaign and immediately following the election we managed to obtain over 40 media hits, including at least:

- 5 in culturally specific and alternative local papers;
- 5 on community/alternative radio;
- 15 in major local papers;
- 6 on mainstream/public radio;
- 6 on local mainstream TV;
- 10 in the national press, including mentions in [Fast Company](#), [The Nation](#), [U.S. News & World Report](#), [Grist](#), and [Mother Jones](#)

Press Endorsements

We received endorsements from 4 culturally specific and/or alternative local newspapers and one larger local newspaper:

- El Hispanic News*;
- The Skanner*;
- Street Roots*;
- Portland Mercury*;
- The Portland Tribune*

Two larger local papers came out in opposition to our measure:

- The Oregonian*⁶⁵;
- Willamette Week*⁶⁶

Social Media

- Paid digital video media** (Portland-targeted) had total reach of over: 1.6 million viewers;
- Paid digital media** (Portland-targeted) display reach of over: 1.5 million viewers;

⁶⁵ The Oregonian is known for its conservative editorial board with a history of intentionally not covering climate change, including local climate impacts or policy, using the tired excuse that: "[Weighing the costs and benefits of climate-change policy is best done at the federal and international levels.](#)"

⁶⁶ It is of note that Nigel Jaquiss, one of the *Willamette Week* editors who conducted the newspaper's endorsement interviews, had spent over a decade as a crude oil trader, working for *Cargill*, *Morgan Stanley* and *Goldman Sachs*.

Facebook boosted post (Portland-targeted) reach just short of: 1.5 million viewers

Op-Eds

Out of approximately a dozen Op-Ed submissions our Communications team coordinated in the final month of the campaign, at least:

6 Op-Eds were published

- 3 in larger local newspapers;
- 1 in a culturally specific/alternative local newspaper;
- 1 on a national blog site;
- 1 mention in a national newspaper, *The Washington Post*

By contrast, our opposition had approximately 2 Op-Eds published in larger local papers.

Letters to the Editor

Our Communications team tracked supporters who reported that they submitted an LTE in the last couple of months of the campaign (most were submitted to one of two larger local papers that publish LTEs). The following are the numbers for just the final few weeks:

Week of 10/1: 2/25 (8%) published

Week of 10/7: 1/12 (8%) published

Week of 10/14: 3/26 (13%) published

Week of 10/21: 2/6 (33%) published

Week of 10/28 (election week): 1/32 (3%) published

Total= 9/101 (~10% rate of getting published; all were published in *The Oregonian/Oregon Live*, Oregon's sole daily newspaper)

The results for LTEs was similar in the month prior, with an average of 2 published per week. Our communications team did not track LTEs published by people who did not report their submission to our campaign, so the numbers of submitted and published LTEs is likely to be significantly higher than those reflected above. The numbers above also do not count online commentary written by supporters on newspapers/websites that do not publish formal LTEs.

Appendix E

Fundraising & Budget by the Numbers

During the entire campaign, our PAC fundraised and spent just over \$500K from ~750 donors, with in-kind contributions totaling another roughly \$250K.

The funds, with approximate percentage of total, were raised from:

- 501(c)(3) and 501(c)(4) organizations (including *GAP*) (57%)
- Business (16%),
- Individuals contributing over \$100 (12%),
- Political committees (7%),
- Individuals contributing under \$100 (6%)
- Labor organizations (1%)

The approximate fundraising and expenditure timeline for the PAC depicts some of the continual budgetary constraints we faced:

- Upon the official launch of our campaign: \$18K in the bank with another \$70K pledged.
- During the two-month signature gathering phase: fundraised ~\$75K, slightly more than was spent: approximately 80% for paid signature gathering, with the remainder mostly for printed materials and legal fees.
- By the end of signature gathering: only \$14K cash on hand with \$24K firmly pledged.
- Toward the end of September we had \$72K in the bank;
- In the final two months of the campaign: raised ~\$300K, and spent roughly the same amount, with an additional approximately \$100K in-kind contributions (primarily in-kind staff time):
 - About 50% of the total cash expenses were for communications, with a rough breakdown of:
 - Digital ads (50%)
 - Mailers and literature drops (10%)
 - Shared mailers to all Portland voters (10%)
 - Communications consulting services (15%)
 - Lawn signs and other swag, social media boosts (10%)
 - 25% for paid campaign staff (field director, two field organizers, part-time communications assistant, financial management consultant services, insurance)
 - 2% overhead (materials & supplies, food)
 - 20% other (polling, compliance services, voter file access, telecommunications and other miscellaneous expenses)

Appendix F

Communications team roles and responsibilities

- Media & press, events- plan & coordinate press releases
- Media & press, events- plan, organize actions
- Media & debate- coordination and coaching of spokespeople
- Media & press- tracking earned media
- Op-Eds/LTEs- recruitment of LTE writers; overall coordination & tracking of LTEs
- Op-Eds/LTEs- recruiting 3rd party validators/frontline spokes for op-eds
- Op-Eds/LTEs- craft content suggestions
- Track & Coordinate coalition endorsers- for Op-Eds, social media shares, email blasts
- Email blasts- Plan & Draft template content for coalition
- Social media- Oversee & strategize overall content; targeted boosting of posts
- Social media- content creation
- Social media- build & organize 'gnome' team to share widely on diff platforms
- Social media- Coordinate content creation
- Website Development/Design
- Website Management/content updates
- Videography
- Photography
- Photo coordination- get photos from coalition partners, stock photos etc. for content
- Language Translation
- Graphic image creation creation for social media, written materials, website etc.
- Design for Fliers, posters, buttons, stickers for outreach
- Arts- banners/visuals for rallies, hand-made signs, costumes, script writer for skits
- Campaign pamphlets, 1-pagers, FAQs- create content

Appendix G

Toolkit: Sample Campaign Messaging & Materials, Resources

1. [Text of Measure](#)
2. [Ballot Title](#)
3. [Sample mailer](#)
4. [Canvass Walk Piece](#)
5. Sample Fact Sheets:
 - [English](#)
 - [Spanish](#)
 - [Vietnamese](#)
 - [Chinese](#)
6. [Sample quarter page flier \(Spanish\)](#)
7. [Flier PCEF Flow Chart](#)
8. [Sample Technical Memo](#)
9. [FAQ](#)
10. [PCEF Poster](#)
11. [Lawn Sign](#)
12. [Vote Yes Signs \(English, Spanish, Chinese\)](#)
13. [Sample Op-Eds](#)
14. [Sample Letters To the Editors](#)
15. [Earned Media:](#)
 - [pre-campaign launch](#)
 - [campaign phase 1 \(signature gathering\)](#)
 - [campaign phase 2 \(persuasion/GOTV\)](#)
 - [election coverage](#)
 - [opposition frames](#)
 - [post-election coverage](#)
 - [post-election opposition onslaught](#)
 - [implementation coverage](#)
16. [PCEF Facebook page](#)
17. [Sample Social Media videos](#)
18. [Signature Gathering front clipboard sheet](#)
19. MOUs & Guides:
 - [Tips for Gathering Signatures](#)
 - [Photography guidelines 'taking good photos' for coalition partners/volunteers](#)
 - [MOU for VAN Data Access](#)
 - [MOU for list sharing between steering organizations and campaign](#)
20. [Pledge Form](#)

21. [Ballot Measure training 101](#)

22. Links to online reports & resources:

- [PCEF website, PCEF on City of Portland website](#)
- [NAACP report: Oregon Energy Justice Snapshot](#)
- [City of Portland 100% Renewable Energy Transition Resolution](#)
- [City Club of Portland research report analyzing and evaluating PCEF as policy](#)
- [Health Equity and the PCEF report \(*Oregon PSR*\)](#)
- [Unleashing the Power of People: Lessons on Public Engagement and Climate Justice \(*NAACP*\)](#)
- [Ballot Initiative Strategy Center \(*digital resource library for ballot-measures*\)](#)

**Vote
YES!**

on Measure

26-201

Bring clean energy & clean
energy jobs to Portland.

Portland Tribune

"While the federal government reverses past gains in the fight against climate change, Portland voters have a chance to lead the way by creating the Portland Clean Energy Fund, showing what can be done at a local level."

THE Skanner

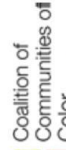
"This measure was the result of a rare grass-roots decision-making process where communities of color led the way rather than being tokenized, and the result is a win-win: a measure that helps Portlanders shift away from a fossil-fuel economy while ensuring people of color will benefit from the green economy. **Vote Yes.**"

**Portland CLEAN
ENERGY Initiative**

Paid for by Portland
Clean Energy Initiative
Portland, Oregon

Empower Portland

The **Portland Clean Energy Initiative**
is endorsed by:



Sample Mailer Card (front)

Design credit: Kathleen Sanchez

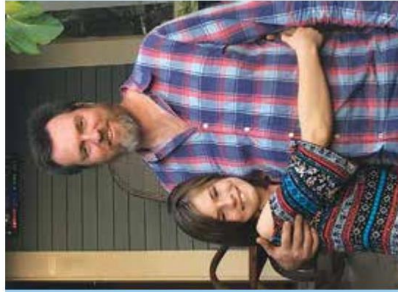
Vote YES!

on 26-201



Aroon, Thai Fresh Owner

"We've owned and operated Thai Fresh in the Jade District for the last 10 years. Our margins are very small, and our utility bills make up a large part of our expenses. Small family-owned businesses like ours should have access renewable energy that lowers our energy costs, while taking climate action!"



Patrick O'Herron, MD

"Prior to our energy retrofit my daughter would get a cough and runny nose that would start in the fall and last until the spring. It stopped as soon as the retrofit was done. The Portland Clean Energy Fund will make these kinds of energy efficiency upgrades available to the people who really need lower utility bills and better air quality the most, not just those who can afford it."

Nicki Nabavizadeh, MD

"Asthma is the most common chronic disease in childhood. Longer fire seasons mean more smoky air that leads to dangerous asthma attacks in kids. This initiative will weatherize homes, including air handling systems to make it safe to breathe."



Gaby Lemieux, age 19

"As a young person frightened about the impact the climate crisis will continue to have on my generation, I'm so excited about The Portland Clean Energy Fund as our opportunity to rise to the responsibility of taking local action at a time when Trump and the federal government are miserably failing us."



Patricia Kullberg, MD

"Portland was never this hot before. I know because I've lived here more than six decades. Extreme heat kills, especially the old, the sick, the isolated, those who live in substandard housing or have no housing at all. I support the Clean Energy Initiative because it offers solutions to problems of extreme heat that will help everyone in our community thrive."



Wan Ping

"As a mother of 3, I worry about my children's health because they have asthma. With the increasing forest fires, Portland sometimes has worse air quality than China, which I never thought I'd experience! I am voting YES for the Portland Clean Energy Initiative to ensure a healthier future for our children."

Sample Mailer Card (back)

Design credit: Kathleen Sanchez



The Portland
CLEAN ENERGY
Initiative

**will make sure
billion-dollar
corporations
pay their
fair share.**

Voting YES on Measure 26-201

**will put clean energy jobs
where we need them most.**

The biggest corporations have record profits but do not pay their fair share in taxes. President Trump's recent tax breaks gave them another 40% giveaway. This initiative ensures that wealthy corporations making over \$1 billion a year pay their fair share on the revenues they make here in Portland.

And, it gives Portland the funding to take action at the local level to counter the Trump Administration's rollbacks on climate change by increasing clean energy sources and clean energy jobs.

We need to pass this initiative so that corporations pay their fair share and we can fund the clean energy and job training Portland needs.



The \$30-million investment in our local economy would mean:



Lower electricity costs
for renters and homeowners.



A surge in new solar energy projects
on homes, schools, and small businesses.



Good, family-wage jobs
that will help low-income Portlanders.

Vote YES on the Portland CLEAN ENERGY Initiative.



Empower Portland: Vote YES on the Portland Clean Energy Initiative

What is it?

- The Portland Clean Energy Initiative will be a November 2018 city ballot measure that would raise **\$30 million per year to weatherize homes, build rooftop solar, provide job training, grow local food production, and fund green infrastructure.**
- Right now, we cannot depend on the federal government to fund a green economy and resiliency to climate change. We cannot wait: it's up to us.
- **Low income households and people of color will be first to receive funding, since they are first and worst impacted by climate change.** Portlanders who need it most will receive energy efficiency housing upgrades & job training to address historic inequities.

How Does it Work?

- Billion-dollar retailers in Portland will pay just a 1% business license surcharge to the Portland Clean Energy Initiative. Corporate tax receipts are at historic lows and 70% of Oregon state revenue comes from individuals. **Large corporations can and should pay their fair share.**
- A committee modeled after the Portland Children's Levy will oversee proposals for the money and approve worthy proposals. According to the Department of Energy, **every \$1 invested in weatherization generates \$1.72 in energy benefits and \$2.78 in non-energy benefits** such as fewer medical bills and less work time lost.
- Landlords who upgrade properties will be required to limit any rent increases.

Who's Behind It?

- **The Portland Clean Energy Initiative was created by groups led by and working for the rights of our city's people of color and low income households (see reverse).** Climate change increases inequality. We need solutions that invest in underserved communities.
- Environmental justice, housing security, and community resiliency will all benefit from increased funding for job access and home energy efficiency.
- We can win: voters in Portland strongly support this measure and **over 200 community organizations, businesses, elected officials, and faith leaders have endorsed us (see reverse).**

Empower Portland.

Pledge to vote YES at www.PortlandCleanEnergyInitiative.com

DONATE at: bit.ly/donatePCEI

   @PDXCleanEnergy

INICIATIVA DE ENERGÍA LIMPIA DE



Empoderar Portland: Vote SÍ por Empleos Verdes y Hogares Saludables

¿Qué es la Iniciativa de Energía Limpia?

- La Iniciativa de Energía Limpia de Portland será una medida de la balota de la ciudad en Noviembre de 2018 que levantaría **\$30 millones por año para climatizar hogares, construir techos solares, proveer la capacitación laboral, crecer la producción de alimento local, y financiar la infraestructura verde.**
- En este momento, no podemos depender del gobierno federal para financiar una economía verde y resiliencia al cambio climático. **No podemos esperar: depende de nosotros.**
- **Los hogares de bajos ingresos y las personas de color serán los primeros en recibir financiación,** ya que son los primeros y los más afectados por el cambio climático. Los habitantes de Portland que más lo necesitan recibirán mejoras en la vivienda de eficiencia energética y capacitación laboral para abordar las injusticias históricas.

¿Como funciona?

- Los minoristas de millones de dólares en Portland pagarán solo un recargo de licencia comercial de 1% para financiar La Iniciativa de Energía Limpia de Portland. Los ingresos tributarios corporativos están en mínimos históricos y 70% de los ingresos estatales de Oregón proviene de individuos. **Las corporaciones mas grandes pueden y deben pagar su parte justa.**
- Un comité modelado del Impuesto de Los Niños de Portland supervisará las propuestas para el dinero y aprobará propuestas valiosas. Según del Departamento de Energía, **cada dólar invertido en climatización genera \$1.72 en beneficios de energía y \$2.78 en beneficios no energéticos,** como menos facturas médicas y menos tiempo de trabajo perdido.
- Los propietarios que actualicen las propiedades deberán limitar los aumentos de alquiler.

¿Quien creó esto?

- La Iniciativa de Energía Limpia de Portland **fue creado por grupos liderados por y que trabajan por los derechos de las personas de color y los hogares de bajos ingresos de la ciudad** (véase el reverso). Cambio climático aumenta la desigualdad. Necesitamos soluciones que inviertan en comunidades desatendidas.
- La justicia ambiental, la seguridad de la vivienda y la resiliencia de la comunidad se beneficiarán de un mayor financiamiento para el acceso al trabajo y la eficiencia energética del hogar.
- **Podemos ganar:** los votantes de Portland apoyan firmemente esta medida y más de 200 organizaciones comunitarias, empresas, funcionarios electos, y líderes de fe nos han respaldado (véase el reverso).

¡Empoderar Portland!

Promesa de votar ¡Sí! en www.PortlandCleanEnergyInitiative.com

DONE en: bit.ly/donatePCEI

   @PDXCleanEnergy

Gây Quỹ cho Năng Lượng Sạch tại



Hiện nay là thời điểm tốt để vận động trong khu vực địa phương về vấn đề thay đổi khí hậu bằng cách đầu tư những công việc làm về Năng Lượng Sạch và Nhà ở hiệu quả.

Vấn đề đó là gì?

- Quỹ cho Năng Lượng Sạch tại Portland sẽ bầu vào tháng 11 năm 2018 gây quỹ khoảng 30 triệu đô la mỗi năm để có những ngôi nhà tiết kiệm điện theo thời tiết, xây dựng những tầng mái thu năng lượng mặt trời trên mái nhà, cung cấp chương trình đào tạo nghề, phát triển trồng thực phẩm trong khu vực địa phương và tài trợ cơ sở hạ tầng xanh.
- Hiện tại, cộng đồng không thể phụ thuộc vào chính phủ liên bang để tài trợ một nền kinh tế xanh và khả năng phục hồi khí hậu. Chúng ta không thể chờ đợi: tất cả tùy thuộc vào mỗi cá nhân chúng ta.
- Gia đình có thu nhập khiêm tốn và dân da màu sẽ được hưởng lợi ích trước tiên từ dự án này PCEF, bởi vì họ là người đầu tiên bị ảnh hưởng nặng từ sự thay đổi khí hậu. Những người dân Portland nào cần thiết thay đổi hệ thống tiết kiệm điện trong nhà và chương trình đào tạo nghề sẽ được giải quyết.

Cách thức như thế nào?

- Các cơ quan kinh doanh tỷ phú về mặt hàng bán lẻ ở Portland sẽ trả một khoản phụ phí 1% cho giấy phép kinh doanh để tài trợ quỹ PCEF. Trump đã cho các công ty như vậy một thời gian nghỉ thuế rất lớn. Đã đến lúc các công ty phải trả những phần công bằng. Phụ phí không phải là từ thuế bán hàng.
- Một ủy ban được mô hình hóa sau khi Portland Children's Levy giám sát các đề xuất về số tiền gây quỹ và phê duyệt về độ chuẩn của đề xuất. Theo Cơ Quan Năng Lượng, mỗi một đô la đầu tư vào sự thay đổi năng lượng thì thu 1,72 đô la những lợi ích trực tiếp từ năng lượng và 2,78 đô la những lợi ích gián tiếp từ năng lượng mang đến như có ít hóa đơn y tế và ít thời gian làm việc hơn.
- Chủ nhà nâng cấp tài sản cho thuê sẽ được yêu cầu hạn chế bất kỳ phí tăng tiền thuê nhà.

Ai đứng đằng sau?

- PCEF được sáng lập ra bởi nhóm người dẫn đầu bằng cách họ chú ý đến các quyền của các thành phố về những người da màu và các hộ gia đình có thu nhập thấp. Sự biến đổi khí hậu đang gia tăng. Chúng tôi cần các giải pháp cho vấn đề này trong những cộng đồng mà ít được phục vụ nhất.
- Môi trường, an ninh nhà ở, và cộng đồng sẽ thấy tất cả lợi ích từ việc tăng nguồn tài trợ cho việc tiếp cận công việc làm và giảm gánh nặng từ năng lượng gây ra.
- Chúng ta có thể thắng: cử tri ở Portland ủng hộ mạnh mẽ biện pháp này trong hơn 150 tổ chức cộng đồng, doanh nghiệp và các nhà lãnh đạo tín ngưỡng đã ủng hộ chúng tôi (Liệt kê những tổ chức ủng hộ nằm phía sau)

Đã đến lúc chúng ta đầu tư gây quỹ cho năng lượng sạch đến tất cả những người dân Portland.

Chúng tôi cần sự giúp đỡ của bạn. Đăng ký để tình nguyện hôm nay tại: PortlandCleanEnergyFund.com

Đóng góp tại: bit.ly/PCEFdonate

 Portland Clean Energy Fund |   @PDXCleanEnergy

Fact Sheet (Vietnamese)



波特兰干净能源基金

支持波特兰：投票给绿色工作&健康家园

现在是地区行动投资干净能源工作和高效能房屋来控制气候变化的好时机。

这是什么？

- 波特兰干净能源将在2018年11月城市投票中通过每年集资3000万建设可以适应气候变化的房屋，建设太阳能屋顶，提供工作培训，种植本地蔬果，还有集资绿色能源基础设施。
- 现在，我们不能依靠联邦政府筹集资金实现绿色能源经济和抵抗气候变化。我们不能再等：这都是我们可以决定的。
- 低收入家庭和亚裔将会是首批的到绿色能源基金福利的人，因为他们是最先受到气候变化影响的人。波特兰居民非常需要获得高效能源住房升级和就业培训，以解决历史上的不公平现象。

如何能够做到呢？

- 在波特兰利润一百万以上的零售商要1%额外的零售税给波特兰干净能源基金。特朗普给企业带来了巨额的减税优惠。现在是公司补交税时候了。附加税不是销售税。
- 以波特兰儿童税收为蓝本的委员会将监督这笔钱使用的提案并批准有价值的提案。根据美国能源部的数据，每投入1美元用于风化就能产生1.72美元的能源效益和2.78美元的非能源效益，例如减少医疗费用和减少工作时间。
- 业主维修他们的房产也将要限制提高租金。
- 波特兰干净能源基金是由我们城市的有色人种和低收入家庭的人民领导和工作的团体创建的。气候改变会增加不平等。我们需要解决办法例如投资于服务欠缺社区。
- 我们是能胜利的：波特兰的选民强烈支持这项措施，超过200个社区组织，企业，民选官员和信仰领袖已经支持我们（见反面）。

支持波特兰！

请投票给干净能源基金 www.PortlandCleanEnergyFund.com

捐款请上这个网址 bit.ly/PCEFdonate

 Portland Clean Energy Fund |   @PDXCleanEnergy



波特兰领导委员会:



包含支持的机构:

- 350.org International
 - Bill McKibben, author, journalist, 350.org founder
 - Naomi Klein, author, social activist, filmmaker
 - A&R Solar
 - Abacus Energy
 - AFSCME Local 88, 2505, 3336
 - Alliance for Democracy
 - Alpha Energy Savers
 - Birdsmouth Construction
 - Center for a Sustainable Economy
 - Center for Biological Diversity
 - Cha Cha Cha Taqueria
 - Citizens' Utility Board (Oregon CUB)
 - City Repair Project
 - Climate Action Coalition
 - Climate Jobs PDX
 - Climate Solutions
 - Commissioner Chloe Eudaly
 - Community Alliance of Tenants
 - Community Energy Project
 - Constructing Hope
 - Democratic Socialists of America, Portland Chapter
 - EcoFaith Recovery
 - Enhabit
 - Food and Water Watch
 - f-my-i [for-my-innovation]
 - Green Hammer
 - Green Lents
 - Hacienda CDC
 - Home Performance Guild
 - Human Access Project
 - Human Solutions
 - ILWU Local 5
 - Jubilee Oregon
 - League of Women Voters Portland
 - Los Mayos Taqueria
 - Main Street Alliance
 - Mixteca Catering
 - Mudbone Grown
 - National Association of Letter Carriers, Branch 82
 - Neighbors for Clean Air
 - Oregon Consumer League
 - Oregon Environmental Council
 - Oregon Food Bank
 - Oregon Latino Health Coalition
 - Oregon League of Conservation Voters
 - Our Children's Trust
 - Portland Association of Teachers
 - Portland Area CSA
 - Portland Community Reinvestments Initiative
 - Portland Harbor Community Coalition
 - Portland Jobs with Justice
 - Right 2 Survive
 - Rose CDC
 - SEIU Local 49
 - SERA Architects
 - Solar Oregon
 - State Rep. Alissa Keny-Guyer
 - State Rep. Diego Hernandez
 - State Senator Lew Frederick
 - State Rep. Tawna D. Sanchez
 - Sunbridge Solar
 - Synchro Solar
 - Tivnu: Building Justice
 - Urban Greenspaces Institute
 - Urban League of Portland
 - Unitarian Community for Earth
 - Willamette Riverkeeper
- Neighborhood Associations:
- Arbor Lodge
 - Boise
 - Brentwood Darlington
 - Cully
 - Eliot
 - Foster Powell
 - Hosford Abernathy
 - Humboldt
 - Linnton
 - Piedmont
 - Portsmouth
 - Richmond
 - Sullivan's Gulch
 - Sunnyside
 - Woodlawn

El Fondo de Energía Limpia de Portland



¡Es hora de empleos verdes, hogares saludables y energía limpia para todos los habitantes de Portland!

El [Portland Clean Energy Fund](#) será una medida electoral de noviembre de 2018 en la ciudad de Portland. Si se aprueba, generará ~ \$ 30 millones por año para impermeabilizar viviendas, construir solar en la azotea, proporcionar capacitación laboral, aumentar la producción local de alimentos y financiar infraestructura ecológica.

Promesa de votar **Sí** hoy:

www.portlandcleanenergyfund.com/pledge

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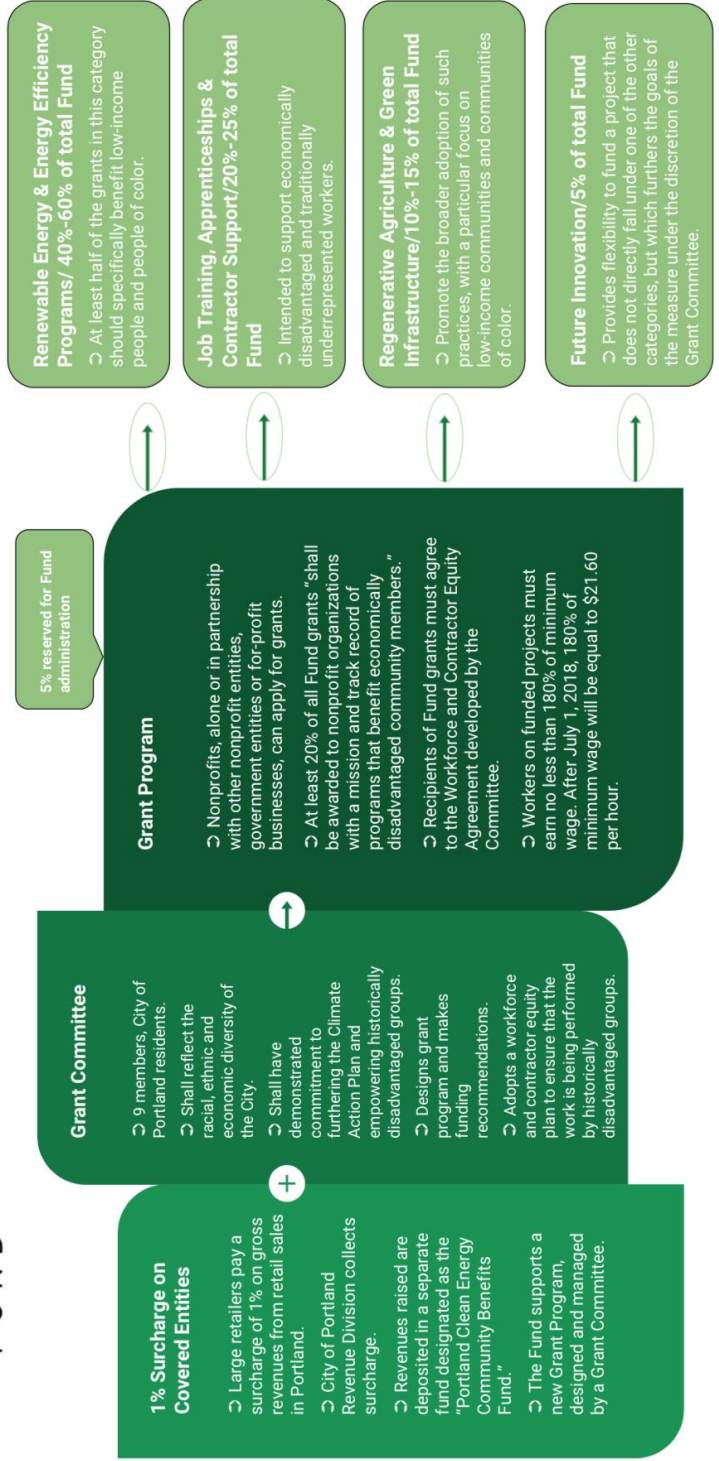
Promesa de votar **Sí** hoy:

www.portlandcleanenergyfund.com/pledge



PORTLAND CLEAN ENERGY — FUND —

Organizations of color, environmental groups, health advocates, faith institutions, and other partners are organizing to put the Portland Clean Energy Fund initiative on the November 2018 ballot in the City of Portland. If passed, it will generate roughly \$30 million annually through a 1% revenue surcharge on retail corporations with over a billion in national sales *plus* over \$500,000 in local sales. The Fund directs its resources to Portlanders who are on the frontlines of climate change but have been excluded from the emerging low-carbon economy: low-income people and people of color.



PCEF Flow Chart Flier



Organizations of color, environmental groups, health advocates, faith institutions, and other partners are organizing to put the Portland Clean Energy Fund initiative on the November 2018 ballot in the City of Portland. If passed, it will generate roughly \$30 million annually through a 1% revenue surcharge on retail corporations with over a billion in national sales plus over \$500,000 in local sales. The Fund directs its resources to Portlanders who are on the frontlines of climate change but have been excluded from the emerging low-carbon economy: low-income people and people of color.

Source of Revenue	How Funds Are Managed	Eligible Uses	Key Equity Provisions
<ul style="list-style-type: none"> Large retailers (those with gross revenues nationally exceeding \$1B, and \$500,000 in Portland) to pay a surcharge of 1% on gross revenues from retail sales in Portland, excluding basic groceries, medicines, and health care services "Large retailer" does not include: <ul style="list-style-type: none"> Any manufacturer or other business that is not engaged in retail sales within the City Any entity operating a utility within the City Any cooperative recognized under state and federal law Any federal or state credit union Revenue Division collects surcharge <ul style="list-style-type: none"> Revenues raised are deposited in a separate fund designated as the "Portland Clean Energy Community Benefits Fund" Nonprofits, alone or in partnership with other non-profit entities, government entities or for-profit businesses, can apply to the Fund via a to-be-established grant program 	<ul style="list-style-type: none"> A 9-member Grant Committee designs grant program, sets and implements program evaluation, and makes funding recommendations City of Portland residents, staggered 4 year terms Initial Committee: Each Portland City Council Commissioner (including Mayor) nominates a member. These 5 then recommend 4 more to the Mayor for appointment Committee member guidelines: <ul style="list-style-type: none"> Shall reflect the racial, ethnic and economic diversity of the City. At least 2 members who live east of 82nd Avenue Shall have demonstrated commitment to furthering the City's Climate Action Plan and empowering historically disadvantaged groups Desired expertise: residential renewable energy and energy efficiency, commercial renewable energy and energy efficiency, workforce development, job training and apprenticeship programs targeted at reaching historically disadvantaged groups; Promoting minority-owned and/or women-owned businesses; Sustainable local food production, green infrastructure and greenhouse gas sequestration; Financing tools that help make renewable energy and energy efficiency available to a broader spectrum of the public 	<ul style="list-style-type: none"> Renewable Energy & Energy Efficiency: 40%-60% of Fund annually <ul style="list-style-type: none"> At least half of the grants in this category should specifically benefit low-income people and people of color Job Training, Apprenticeships & Contractor Support: 20%-25% of Fund annually <ul style="list-style-type: none"> Aimed at supporting economically disadvantaged and traditionally underrepresented workers in the skilled workforce Regenerative Agriculture & Green Infrastructure programs that result in sequestration of greenhouse gases: 10%-15% of Fund annually <ul style="list-style-type: none"> Promote the broader adoption of such practices, with a particular focus on low-income communities and communities of color Future Innovation: 5% of Fund annually <ul style="list-style-type: none"> Provides flexibility to fund a project that does not directly fall under one of the other categories, but which furthers the goals of the measure Fund Administration: 5% of Fund annually <ul style="list-style-type: none"> Can be exceeded in 2019 and 2020 	<ul style="list-style-type: none"> At least 20% of all Fund grants "shall be awarded to nonprofit organizations with a mission and track record of programs that benefit economically disadvantaged community members" At least 50% of the Fund's Renewable Energy and Energy Efficiency projects "should specifically benefit low-income residents and communities of color" Renewable Energy and Energy Efficiency funding agreements "shall include terms to encourage rent stability including, but not limited to, provisions barring owners from using improvements funded by this Measure as a basis for rent increases" Grant Committee shall "Adopt a workforce and contractor equity plan to ensure that the work funded by the Committee is being performed by historically disadvantaged groups, including measurable and ambitious goals for the training and hiring of historically disadvantaged groups, including women, people of color, people with disabilities, and the chronically underemployed and measurable goals for contracting with businesses owned or operated by such groups" "In developing the plan and goals, the Committee shall consult with workforce and contractor equity stakeholders as well as incorporate appropriate best practices from City procurements" "Recipients of Funds must agree to the Workforce and Contractor Equity Agreement developed by the Committee" Workers on funded projects must earn no less than 180% of minimum wage



Frequently Asked Questions (FAQs)

How will it be funded?

Our measure authorizes a 1% supplemental business license fee on retail corporations, such as Apple, Starbucks, and Wells Fargo that generate over \$1 billion a year in revenue, with at least \$500,000 in Portland-based sales. The fee would be calculated based on their annual Portland revenue. Many of these large corporations are enjoying record revenues and all are paying a record low effective tax rate.

How will the money be distributed?

A Commission comprised of seven citizens, appointed by the City Council, will oversee competitive proposals for use of the funds. All members of the Commission will reflect the racial, ethnic, and economic diversity of experience and backgrounds important for successful implementation of the measure. Each member must have strong interest and experience in reducing greenhouse gas emissions, acting on climate change, and advancing racial and economic justice.

Will this help with Portland's housing crisis?

For many current residents below or near the poverty line, staying in their existing housing is more and more challenging. That is especially true for people living in houses or apartments without any energy efficiency or renewable infrastructure. This measure will put money into upgrading both residential and multifamily housing in Portland's most vulnerable neighborhoods. For renters, it will mean less money spent on utilities and warmer homes. According to the U.S. Department of Energy for every \$1 invested in weatherization \$1.72 is generated in energy benefits and \$2.78 is generated in non-energy benefits such as fewer medical bills and less work time lost. Landlords who upgrade their properties will be required to limit any rent increases, ensuring that resources from the fund will go to benefit tenants.

Sounds like Measure 97, is it?

Portlanders know that large corporations need to pay their fair share to support our communities. They can't just take our money and run. That's why Measure 97 passed in Portland with 60.6% of the vote, even though it lost statewide.

Our measure differs from Measure 97 in the following ways:

- PCEF makes targeted investments in energy efficiency
PCEF exempts groceries and medicine
- PCEF only applies to large retail corporations with \$1 billion or more in annual national sales and \$500k or more locally
- PCEF applies to the City of Portland only
- PCEF has specific instructions for the distribution and administration of the funds that include citizen oversight.

Who helped to write the initiative?

The Portland Clean Energy Fund initiative was conceived and written by leaders of respected local groups who advocate for economic, social, racial and climate justice. These leaders understand that these issues are often tied together and present Portland with an incredible opportunity to make a great leap forward on all fronts.

APANO - <http://www.apano.org/>

Coalition of Communities of Color - <http://www.coalitioncommunitiescolor.org/>

NAACP, Portland Branch - <http://www.portlandnaacp1120.org/>

NAYA - <http://nayapdx.org/>

Verde - <http://www.verdenw.org/>

350PDX - <https://350pdx.org/>

Sierra Club - <http://oregon2.sierraclub.org/chapter>

Can we attract additional investment because of this new revenue stream?

It is well-established in the renewable energy and energy efficiency fields that governmental funding and cash incentives can be used strategically with loan capital to greatly increase the overall impact of the governmental funds. Conservative estimates in Oregon assume a 2:1 leveraging ratio for energy efficiency and renewable projects. This means that \$30 million in new annual fee revenue can be leveraged to create annual project spending of \$60 million or more.

Why target retail corporations?

Most retailers have the longest supply chains and don't account for greenhouse gases in the production and distribution of their products. In addition they pay low wages and generally don't invest in our community. For every dollar spent at a national retail store, only 58 cents gets recirculated back into the community as opposed to 73 cents of every dollar spent at a locally owned store. Of the approximately 125 companies that will be affected, 45 have overseas tax havens, some with as many as 40 or 50 of these havens.

How will this affect consumer prices?

Many national retailers have standard pricing irrespective of local fees, enabling them to advertise sales nationally. There is no research or evidence that indicates this would meaningfully affect demand or hurt consumers. Since the increased business license fee would only be 1% of gross receipts, any impact on the price of goods would be extremely small and well within the range of normal price variations. Even assuming a business such as McDonalds passed on the entire amount of a 1% local license fee, the price of a \$4.00 hamburger would be increased by just \$.04.

How can I be sure the dollars will be spent wisely?

Administrative costs are limited to 5%. A committee patterned after the successful Portland Children's Levy will decide on which projects get funded and assure accountability. Members of the

committee are required to have extensive experience in the fields pertaining to the initiative targets and goals.

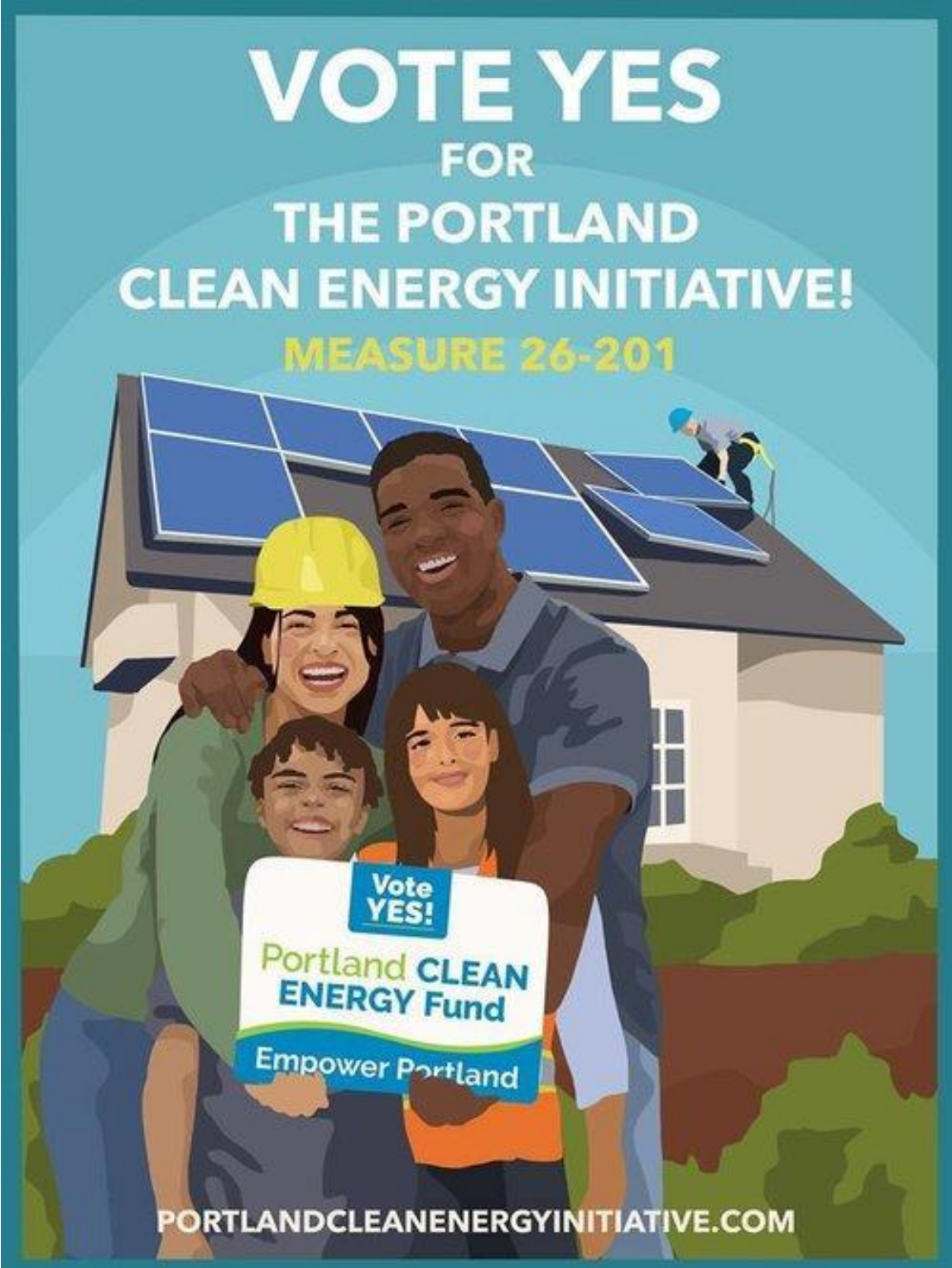
Don't we already have programs to do this work?

This initiative will create a stable source of long-term funding that is aligned with the scale we need at the local level to address climate change and economic equity, which no existing programs do. Other programs may have similar energy efficiency goals, but current programs only work for property owners with the means to make significant contributions to the projects and/or have the ability to utilize tax credits. Further, in 2014, Oregon Public Utilities Commission cut residential energy efficiency incentives available via the Energy Trust of Oregon. And current solar funding and solar tax credits are also on the chopping block at the federal and state levels.

Another fund, Energy Trust, provides support and incentives for residential energy efficiency and solar to the level governed by the Oregon Public Utilities Commission, whose mission does not include climate change and social justice. This effort is merely adding community-funded rebate dollars on top of Energy Trust incentives. The entire customer service and contractor network capabilities of Energy Trust will be leveraged.

What about homes in Portland that have already received energy efficiency upgrades?

Of the 249,000 single family and multiple family housing units in Portland, approximately 50% don't have any weatherization and many others have only partial weatherization. Funds from this initiative will help stop the boom-and-bust cycle of insufficient support for energy efficiency and solar by utilities and public agencies, as well as provide much needed support for our most under-resourced residents and neighborhoods.



PCEF Poster

Poster design credit: Ameya Okamoto



PCEF Lawn sign



PCEF Logo/Brand Design credit: Dina Le Roux (Renew Oregon)

¡Vote SÍ! en **26-201**



PORTLAND

INICIATIVA DE ENERGÍA LIMPIA

www.portlandcleanenergyinitiative.com

投票YES 给措施 **26-201**



PORTLAND

波特兰干净能源倡导项目

www.portlandcleanenergyinitiative.com

Earned Media

Sample Op-Eds (published)

[Four reasons why Portlanders should pass the PCEI \(Op-Ed: Neil Kelly, *Portland Business Journal*, 10/3/18\)](#)

[My View: Clean Energy Initiative Eases Housing Crisis \(Op-Ed: Duncan Hwang, *Portland Tribune* 10/11/18\)](#)

[E.D. Mondaine, NAACP Portland Branch \(*Oregonian*, 9/1/18\)](#)

[Neighborhoods Urge Passage of PCEI at Citizens' CUB Policy Conference \(Op-Ed: Oregon PSR, *The Skanner*, 10/19/18\)](#)

[Big Oil is sloshing a crude tsunami across the country \(mention in Op-Ed: Bill McKibben, *The Washington Post*, 10/30/18\)](#)

[From Portland: A Tax to Fund Equity in Tackling Climate Change \(Former Portland mayor Sam Adams Op-Ed, *CityLab*, 11/2/18\)](#)

[Portland Clean Energy Fund Takes Bold Action for Climate Justice \(Op-Ed: Adriana Voss-Andreae, E.D. Mondaine, *Street Roots*, 7/12/19\)](#)

Sample Letters to the Editor (published)

[Clean energy initiative fights poverty \(*Oregonian*, 10/7/18\)](#)

[Portland clean energy initiative brings focused progress \(*Oregonian*, 10/8/18\)](#)

[Local action against climate change \(*Oregonian*, 10/12/18\)](#)

[“Act, don’t just talk about clean energy” response to Mayor on climate \(*Oregonian*, 10/15/18\)](#)

[Guided by climate justice \(*Oregonian*, 10/18/18\)](#)

[Local actions, global warming \(*Oregonian*, 10/24/18\)](#)

[Clean energy measure deserves a ‘yes’ \(*Oregonian*, 10/25/18\)](#)

[Portland Clean Energy Initiative helps housing crisis \(*Oregonian*, 10/28/18\)](#)

[We must pass Portland’s Clean Energy Initiative \(*Oregonian*, 10/29/18\)](#)

[Clean energy bill promotes holistic ecological health \(*Oregonian*, 11/1/18\)](#)

Pre-Campaign Launch

[Climate activists file initiative to create Portland sales tax \(*Portland Tribune*, 1/27/18\)](#)

[Proposed Portland Ballot Initiative to Tax Corporations for Green Energy Projects Faces a Court Challenge \(*Willamette Week*, 2/19/18\)](#)

[With judge's ruling, Portland Climate-related tax moves closer to ballot \(*Oregonian*, 4/30/18\)](#)

[Portland campaign to tax large corporations to address climate change gets go-ahead \(*Portland Tribune*, 5/2/18\)](#)

[Commissioner Chloe Eudaly and advocates prepare to launch a climate change tax on corporations \(*Willamette Week*, 5/9/18\)](#)

[Enviros team with people of color to push city business tax initiative \(*Portland Tribune*, 5/9/18\)](#)

Campaign Launch, Phase 1 (Signature Gathering)

[Building a Healthy Neighborhood in Cully, Carolina Iraheta & Tony DeFalco on The Old Mole Variety Hour \(*KBOO radio*, 5/28/18\)](#)

[PCEF with Maggie Tallmadge on Native Voices from the Edge \(*KBOO radio*, 5/31/18\)](#)

[Portland Clean Energy Fund on Locus Focus \(*KBOO radio*, 6/11/18\)](#)

[KATU News coverage of PCEF press conference on FB \(*KATU News*, 7/5/18\)](#)

[Tax on major Portland retailers would fund energy projects \(*Fox12* 7/5/18\)](#)

[Portland Clean Energy Fund doubles signatures needed for November ballot \(*Portland Tribune*, 7/5/18\)](#)

[New Portland Tax on Large Retailers Appears Headed for City's November Ballot: Supporters of Portland Clean Energy Fund turn in 60,000 signatures, 350,000 more than required to make the ballot \(*Willamette Week*, 7/5/18\)](#)

[Portland Clean Energy Measure Will be on Ballot in November \(*The Skanner*, 7/28/18\)](#)

[Should big corporations pay for clean energy? Portland voters will decide \(*Grist*, 7/30/18\)](#)

[Mayor sorry to see clean energy fund on ballot \(*Portland Tribune*, 8/8/18\)](#)

Campaign, Phase 2 (Persuasion/GOTV)

[Portland Clean Energy Fund Ballot Measure Draws High Profile Endorsement: U.S. Jeff Merkley signs on to campaign hoping to tax large retailers \(*Willamette Week*, 9/12/18\)](#)

[Portland Clean Energy Fund is the right thing for the people \(*Street Roots* editorial endorsement, 9/14/18\)](#)

[Don't Utilities Already Do the Things the Portland Clean Energy Measure Proposes to Do? Companies that could be taxed include behemoths like Walmart and Comcast, but also less obvious stores, like REI \(*Willamette Week*, 9/19/18\)](#)

[What you Need to Know About Portland Clean Energy Measure 26-201 \(*Oregon Public Broadcasting*, 9/21/18\)](#)

[Corporate Accountability & the Portland Clean Energy Initiative on Voices from the Edge \(*KBOO radio*, 10/4/18\)](#)

[Here's who's donating big bucks to defeat Portland's clean energy fund \(*Portland Business Journal*, 10/5/18\)](#)

[Our Opinion: Clean energy fund must help neediest \(*Portland Tribune* editorial endorsement 10/9/18\)](#)

[Opponents of Portland Clean Energy Measure: Tax Haul Could Double City's Estimate \(*Willamette Week*, 10/9/18\)](#)

[Opponents Say Portland Clean Energy Measure Could Cost More Than Originally Thought \(*Oregon Public Broadcasting*, 10/10/18\)](#)

[Report: Clean Energy Fund could cost up to \\$79M \(*Portland Tribune*, 10/10/18\)](#)

[Breaking down Portland Measure 26-201: Clean energy business tax \(*KGW T.V. clip*, 10/11/18\)](#)

[Portland Clean Energy Initiative, *Think Out Loud* Debate with Jenny Lee & Andrew Hoan \(*Oregon Public Broadcasting radio*, 10/15/18\)](#)

[Dr. Kullberg of Oregon PSR on PCEF health equity report \(*KBOO radio*, 10/15/18\)](#)

[Portland could make big businesses pay to protect Communities of Color from climate change \(*Fast Company*, 10/18/18\)](#)

[*El Hispanic News* endorses the Portland Clean Energy Community Benefits Initiative 2018 \(*El Hispanic News* editorial endorsement, 10/18/18\)](#)

[Neighborhoods Urge Passage of Portland Clean Energy Initiative \(Measure 26-201\) at Citizens' Utility Board Policy Conference \(*The Skanner*, 10/19/18\)](#)

[Friday Forum *Up for Debate*: The Portland Clean Energy Fund \(*City Club of Portland*, livestream, 10/19/18\)](#)

[Up for Debate: The Portland Clean Energy Initiative \(City Club of Portland Debate with Jenny Lee and Tony DeFalco vs opposition campaign, XRAY FM 10/19/18\)](#)

[Advocates Argue Small Business Owner Was “Tricked” Into Opposing Clean Energy Initiative \(Portland Mercury, 10/23/18\)](#)

[Portland Business Owners Say They Ended Up On Campaign Material They Didn’t Actually Support \(Oregon Public Broadcasting, 10/26/18\)](#)

[Mercury Endorsement- Vote Yes on Portland Clean Energy Initiative \(Portland Mercury, 10/26/18\)](#)

[Complaint: Two restaurateurs feel ‘misled and used’ by no campaign on Clean Energy Fund \(Portland Tribune, 10/26/18\)](#)

[Portland business owners say they ended up on campaign material they didn’t actually support \(The Columbian, 10/26/18\)](#)

[The Portland Business Alliance Kicked Out Faith Leaders Wanting to Talk to Them About the Clean Energy Initiative \(Portland Mercury, 11/1/18\)](#)

[Your Vote: What to know about Portland’s Clean Energy Initiative \(Fox12 KPTV, 11/1/18\)](#)

[Oregon dismisses complaint alleging Portland campaign misled business owners \(Oregon Public Broadcasting, 11/2/18\)](#)

[Straight Talk: Portland Clean Energy Project Fund Measure \(Measure 26-201\) \(KGW, 11/3/18\)](#)

[Anti-Clean Energy Groups Have Come Up With a Way to Show They Have Grassroots Support: Even though they don’t. It’s called “astroturfing” \(Mother Jones, 11/4/18\)](#)

[PCEF described as key local vote to watch in 2018 election \(The Nation, mention 11/5/18\)](#)

Election Coverage

[Election 2018: Portland tax on large retailers to fund clean energy winning big \(Portland Business Journal, 11/6/18\)](#)

[Metro affordable housing, Portland’s clean energy both passing \(KATU, 11/6/18\)](#)

[Portland Pass Measure to Create Clean Energy Fund \(Oregon Public Broadcasting, 11/6/18\)](#)

[Portland’s Clean Energy Measure Soars to Victory- Voters love the idea of taxing big-box retailers, banks and Comcast to pay for green energy projects and job training \(Willamette Week, 11/6/18\)](#)

[Portlanders Pass Measure to Create Clean Energy Fund \(Jefferson Public Radio, 11/6/18\)](#)

[Portland voters pass clean energy measure: Portland voters passed a measure that will make it easier for those who live in low income communities to take part in clean energy projects \(KGW8 TV, 11/7/18\)](#)

[Voters endorse Portland clean energy tax \(Oregonian, 11/7/18\)](#)

[Fossil Fuel money crushed clean energy ballot initiatives across the country \(mention in Vox, 11/11/18\)](#)

Opposition campaign frames in media

[Portland's Clean Energy Tax is Direct Democracy at its worst \(reason, 7/31/18\)](#)

[Op-Ed: Clean Energy Fund outcomes inefficient and hazy, Reppenhagen, City Club's board of governors \(Opposition Op-Ed in Oregonian, 9/30/18\)](#)

[WW's November 2018 Endorsements for Oregon Ballot Measures: Portland needs housing. Vote for that. Other ideas are far messier. \(Willamette Week editorial board opposing PCEF, 10/18/18\)](#)

[Vote 'no' on Portland clean energy fund measure \(Oregonian editorial opposing PCEF, 10/20/18\)](#)

[Oregonian, Willamette Week Oppose Business Tax 26-201 \(Oregon Business Report, 11/2/18\)](#)

Post-election Coverage

[6 glimmers of climate optimism for the end of a dark year \(mention in Fast Company, 12/24/18\)](#)

[2018 in Review: Fossil Fuel Companies Fumble; Clean Energy Bills Set to Take Spotlight \(mention in Sightline, 12/27/18\)](#)

[Tax the Rich, Fight the Climate Crisis \(Common Dreams, 1/17/19\)](#)

[Portland, Oregon Passes a Tax to Fund Clean Energy Initiatives \(U.S. News & World Report, 1/30/19\)](#)

[Portland passes Clean Energy Initiative \(mention in Solar Power World, 12/3/18\)](#)

[Attentive Silence: The role of listening in the environmental justice movement \(Medium, 3/22/19\)](#)

[4 creative ways cities are transitioning to a clean energy future \(mention in Greenbiz, 4/1/19\)](#)

[What's new with community solar? \(mention in Greenbiz, 4/5/19\)](#)

[What Would a City-Level Green New Deal Look Like? Seattle's About to Find Out \(mention in Inside Climate News, 8/15/19\)](#)

Post-election opposition onslaught

[The Cost of Building New Schools and Affordable Housing Could Rise Under the Portland Clean Energy Fund \(Willamette Week, 6/5/18\)](#)

[Portland Business Alliance Pushes City to Limit the Clean Energy Fund Surcharge: A fight under way in City Hall could determine whether the cost of affordable housing and schools rises \(Willamette Week, 6/6/18\)](#)

[Portland retail tax applies more broadly than thought, igniting opposition at City Hall \(Oregonian, 6/6/19\)](#)

[Energy fund costs could hit taxpayers: Opinion issued by the Portland City Attorney says many more businesses must pay the 1% surcharge than supporters claimed during the ballot measure campaign \(Portland Tribune, 6/7/19\)](#)

[Energy Fund costs could hit taxpayers \(Portland Tribune, 6/7/19\)](#)

[Sources: Concern grows over Clean Energy Fund tax \(Portland Tribune, 6/13/19\)](#)

[Garbage and recycling bill going up for Portlanders \(KATU, 6/24/19\)](#)

[Will the Portland Clean Energy Tax Be Passed on to Consumers? Check Your Trash Bill: The expected revenues from the tax expanded greatly- after voters passed it. \(Willamette Week, 6/26/19\)](#)

[My View: Why are Portland residents being double taxed? \(Rachel Dawson, Cascade Policy Institute, Opposition Op-Ed in Portland Tribune, 7/9/19\)](#)

[Cellular phone customers are the latest Portlanders to see an unexpected fee from the clean energy fund \(Willamette Week, 8/28/19\)](#)

[Retailers weigh challenging the Portland Clean Energy Fund in court \(Willamette Week, 9/25/19\)](#)

[AT&T has been charging Portland customers for a tax it won't pay \(Willamette Week, 10/9/19\)](#)

[AT&T says customers wrongly hit with Portland Clean Energy fee will get refunds \(Oregonian, 10/11/19\)](#)

[Portland lawyer files class action suit over AT&T's improper billing of customers for the clean energy surcharge \(Willamette Week, 10/11/19\)](#)

[Portland lawyer collecting clients for lawsuits against AT&T \(Willamette Week, 10/17/19\)](#)

[Dozens of Oregon customers file lawsuit against AT&T over surcharge \(KGW, 10/17/19\)](#)

[Lawsuit filed against Safeway over 1% surcharge \(KGW, 10/21/19\)](#)

[Safeway Face Lawsuit over Hidden Fees Related to Portland Clean Energy Tax \(Oregon Public Broadcasting, 10/22/19\)](#)

[Extra charge on Portland shoppers grocery receipts is part of new city-wide clean energy tax \(Fox12, 10/27/19\)](#)

[Customer sues Safeway over secret surcharge on items in Portland \(KPTV, 10/23/19\)](#)

[Billion-dollar insurance corporations could be excused from Portland Clean Energy tax \(Portland Mercury, 10/31/19\)](#)

Implementation Coverage

[City laying groundwork for Clean Energy Fund \(Portland Tribune, 1/8/19\)](#)

[City starts to turn Clean Energy Initiative into reality \(Portland Tribune, 2/21/19\)](#)

[City Council Make the Portland Clean Energy Fund Official \(Portland Mercury, 2/22/19\)](#)

[Portland City Council Approves Ordinances to write Portland Clean Energy Fund into City Code \(The Skanner, 2/25/19\)](#)

[Sam Baraso Tapped to Administer Clean Energy Fund \(The Skanner, 5/14/19\)](#)

[City hires manager for Portland Clean Energy Fund \(Oregonian, 5/15/19\)](#)

[You Can Help Decide how Portland's Clean Energy Fund Is Spent \(Portland Mercury, 5/20/19\)](#)

[Clean Energy Fund Oversight Forms \(Portland Observer, 10/1/19\)](#)

[Council to appoint first five clean energy fund committee members \(Portland Tribune, 10/25/19\)](#)

[Final four clean energy fund committee members appointed \(Portland Tribune, 11/8/19\)](#)

[Supporting Frontline Leadership and Pursuing a Just Energy Transition in Portland \(Sierra Club, 12/20/19\)](#)

[No American City has ever tried a Climate Justice Tax like the one Portland Is Launching. What's the Plan? It's a local version of the Green New Deal proposed in 2019 by U.S. Rep. Alexandria Ocasio Cortez \(Willamette Week, 1/8/20\)](#)

Coverage by opposition right-wing media outlets

[Portland to be first to enact its own version of Green New Deal tax, officials encourage other cities to follow \(BizPac Review, 1/9/20\)](#)

[If the Green New Deal can't make it in Portland, it can't make it anywhere \(Washington Examiner, 1/28/20\)](#)

Coverage of City Council additional Exemptions

[City Council Will Consider Clearer Definition of “Retailer” for Portland Clean Energy Fund This Week. Impact of narrower definitions would reduce annual revenue by about \\$10 million \(Willamette Week, 12/9/19\)](#)

[City Council Unanimously Approves Exempting Construction, Garbage and Recycling Firms from New Clean Energy Tax \(Willamette Week, 12/14/19\)](#)

[Portland adds more businesses exempt from voter-approved retail tax, lowering estimated revenue by \\$10 million \(Oregonian 12/12/19\)](#)

[City Approves \\$10M in new exemptions on Clean Energy Fund tax \(Portland Business Journal, 12/13/19\)](#)

[Portland residents' monthly recycling bills to go down 40 cents \(Oregonian, 1/8/20\)](#)

PCEF mini-documentary video

https://www.youtube.com/watch?time_continue=1&v=TtDCvGmThKs&feature=emb_logo

Sample Social Media Videos

[PCEF video: Why Verde supports PCEF Carolina Iraheta Gonzalez \(8/14/18; 1.6k views\)](#)

[Van Jones on “the most important ballot initiative in the country” \(9/13/18; 7.7k views\)](#)

[PCEF video: “all we’re asking is 1% from the 1%” \(10/10/18; 21k views\)](#)

[PCEF video: “Vote Yes!” \(10/11/18; highest reach with 194k views\)](#)

[Walmart Action video \(posted 10/17/18; 4.6k views\)](#)

[Graphic explainer video on PCEF \(Lara Media; 10/29/18; 0.1k views\)](#)

[Dr. Kullberg MD, MPH Vote Yes \(10/30/18; 10k views\)](#)

[Graphic PCEF slideshow explainer in Spanish \(Lara Media; 11/1/18; 1.3k views\)](#)

[High School students urge Portland adults to vote YES on 26-201! \(11/1/18; highest organic reach with 168k views\)](#)

[Graphic explainer video on PCEF with Vietnamese subtitles \(Lara Media; posted 11/4/18; 3k views\)](#)



Building a Just,
Clean Energy Future
for All of Portland.

The Portland Clean Energy Fund Steering Committee:



Coalition of
Communities of
Color



PORTLAND BRANCH 1120

NAACP



OPAL
ORGANIZING PEOPLE / ACTIVATING LEADERS



OREGON CHAPTER



Website Tips for Gathering Signatures

Declare yourself: Gathering signatures requires that we interrupt people from whatever they're doing. **Show respect. Be friendly.** "Excuse me" or something equivalent makes a good opener. If you are a volunteer signature gatherer, say so: "**I'm not fundraising.** I'm not a paid petitioner. I'm volunteering because I believe in this."

Know the measure: Share your story about why you are a passionate and proud supporter of the Portland Clean Energy Fund. If you don't know the answer to a question, say so. Be sure you give people the measure if they want to see it and direct them to our website if they have questions you can't answer. Text of the measure is on your clipboard (show people) and available on the City of Portland website and **here**.

Signature sheets: use **official signature sheets only**, DO NOT PHOTOCOPY THEM, come to the campaign office for more, or talk to your organization's volunteer coordinator.

Use **black pens** (blue works but no other colors).

If someone makes a mistake, have them cross it out with a **single horizontal line**, write their initials near the crossed out portion, then write the correct information. Signers may also cross out an entire line with a single horizontal penstroke and start over on the next available line (no initials needed).

Be sure to confirm that each signer is registered to vote in the City of Portland, has not already signed this measure, and uses their voter address on the sheet.

Circulators should only sign and date the bottom of the sheet after they are finished with that sheet. Don't sign the bottom of a sheet until you're done collecting signatures on that sheet (your signature should be on or after the last day from the latest signature).

We don't have enough **one-pagers** to hand them out to passersby, but you can photocopy your own extra copies AND/OR ask people to take photos of the front/back one-pager if they have a phone AND/OR direct them to the website.

Social media: share on social media that you're collecting signatures - especially if you can post on the go! tag them **#PDXCleanEnergyFund** *DO NOT take photos of people's address and signature on your signature sheets*

Turn in your completed signature sheets on a weekly basis: **every Monday to the campaign office or to your organization's volunteer coordinator.** Do not write in the sheet number.

Internal Signature Gathering tips:

When gathering signatures at a table or booth, avoid sitting behind the table. It may make you feel more secure, but it's not as effective in collecting big quantities of signatures---it's better to be out there greeting the public.

Gathering signatures requires that we interrupt people from whatever they're doing. Show respect. Be friendly. "Excuse me" or something equivalent makes a good opener.

Briefly say something that's natural for you, such as, "We're collecting signatures for living-wage, clean energy job training in Portland." or "Let's bring good jobs in clean energy to Portland."

Explain right away that:

"I'm not fundraising. I'm not a paid petitioner. I'm volunteering because I believe in this."

At this point, if you hear, "No thanks" or "I'm good", that means it's not happening today. Smile. Move on. Don't take it personally. No backtalk. Leave a good impression. Maybe next time.

From trainings:

Know the measure: If you don't know the answer to a question, say so. Speak from your heart about why you are passionate about the campaign. Be sure you give people the measure if they want to see it, direct them to the website if they have questions you can't answer. Text of the measure is on you clipboard (show people) and available on the city website and PCEF website.

Signature sheets: use the official ones only, DO NOT PHOTOCOPY THEM, come to the campaign headquarters (1821 SE Ankeny St, Portland, OR) for more

Use **black pens** (blue works but no other colors)

We don't have enough **one-pagers** to hand them out to passersby- you can photocopy your own extra copies AND/OR ask people to take photos of the front/back one-pager if they have a phone AND/OR direct them to the website

Social media: share on social media that you're collecting signatures - esp if you can post on the go! tag them #PDXCleanEnergyFund *DO NOT take photos of people's address and signature*

Practice! This will be more comfortable the more you do it!

Best practices: eye contact, engage with people (don't wait for them to come to you), smile, wiggle the sign, walk with people, be polite, two second line: sign my clipboard for clean energy in Portland? Are you on board for clean energy and job training for portlanders? Climate change mitigation? Job training? Justice/equity? Low income communities? Read your audience

- say you're a volunteer out here because you care about it
- sheep effect: if you get a big group of nos in a line, skip a couple ppl and start again
- Ask: are you a portland voter? If you're not sure: did you get a ballot with city council on it?
- What if I already signed: don't knowingly sign again! If you're not sure our data entry folks should catch it
- Make sure the first entry is very neat! Everyone will follow them
- Do not leave signature sheet unattended- you have to observe every

signature (though you can speak to someone else while someone is signing)

- Sign with the name the government knows you as, the signature doesn't have to be legible it just has to be what matches your voter's registration
- you can help people who cannot fill out their own info- THEY must sign
- Mistakes (they cross out and initial), you can cross out entire line and have them write on the next line (no initial needed)

Signing the sheet: don't sign until you're done collecting signatures (your signature should be on or after the last day from the latest signature)

- Turn in sheets on **Mondays**- at PCEF office or to your organization
- Do not write in sheet number

PHOTOGRAPHY GUIDE

Photography is one of the best communication tools at the disposal of the Portland Clean Energy Fund (PCEF) initiative. Captivating images will draw prospective supporters to learn more about the campaign and how they can make the images of green communities, solarization, and green economy job training a reality in Portland. To maximize its positive impact, photography should be composed, taken, and distributed according to the following guidelines to the greatest extent possible.

SUBJECTS/FOCUS ON THE INDIVIDUAL

- Take and use photos of individuals and small groups. If you want to take a photo of a crowd, pick one individual to make the subject and use the rest of the crowd as background.
- Faces are the easiest way to draw in a viewer and pull them in to PCEF communications.
- Take dynamic photos of people in action, rather than seated portraits or inanimate objects.

CANDID

- Take and use photos of subjects in natural, unstaged poses. Unposed photographs will make graphic communications seem more authentic and relatable.

NO SELFIES

- Avoid photographs in which the photographer is also a subject. Always attempt to find a person who can take a photo of subjects.
- The one exception to this rule is for discrete social media campaigns wherein PCEF asks folks to take a selfie with, for example, their petition clipboards

WELL LIT, EXPOSED, AND COMPOSED

- Poor exposure, blurry images, and awkward cropping can all affect the power of a photograph to capture a viewer's interest. Review the basics of how to compose an image [here](#).
- Color balance the shot to make sure bright backgrounds or subjects do not overexpose the entire image.
- Remember to capture one or a small number of subjects, rather than large crowds.
- Incorporate enough of the background image to orient the viewer without losing the subject as the main focus.

SHOWCASE DIVERSE SUBJECTS

- Use a diversity of photo subjects to illustrate PCEF’s breadth of supporters and stakeholders, and communicate which individuals and communities will be resourced by the initiative.
- Upcoming summer community events are a great way to get authentic, dynamic photos of community members who support the initiative. This will also help the initiative avoid using stock photos, which will contradict the grassroots nature of PCEF. Here is one source for upcoming events: <https://signup.com/login/entry/686988796581076074>
- Pictures of individuals, families, neighbors in their communities, working together on neighborhood projects, of people receiving job training outside, or of the development of climate-related community assets are all great!

DON’T FORGET THE LOGISTICS...

When images contain a person’s face, we must get [a photo release](#) to use it. Have all subjects sign a photo release. At PCEF events or when there will be a PCEF photographer present at an event, let all attendees know that someone is taking photos, and let them know that they should bring concerns to staff and volunteers (in addition to having them sign photo releases). Access the PCEF Photo release [here](#), in the “Photos” folder of the shared drive.

AND HAVE FUN!

Since you are a supporter of PCEF, if it is an activity or place common in your daily routine that you think speaks to the PCEF message, then it will speak to other supporters, as well! Start taking photos during your daily routine, and especially during PCEF events and outreach.

And don’t forget to upload your photos to the shared PCEF photo cache [here](#), in the “Photos” folder of the shared drive. This source will be our go-to for images to include in all initiative communications content—use it to boost engagement with our social media posts and other initiative materials!

PCEF VAN Data Flow and MOU

Tracking organizational source of petition signatures

Many of our organizations have goals of building our base through the PCEF campaign and may find it important to track who they gather signatures from. This is optional for each organization.

- Organizations will paperclip a cover sheet onto each stack of their petition sheets when turning in to the databasing team.
- Petition gatherers and their organizational affiliations will be tracked in a google spreadsheet. Databasers will have access to this spreadsheet to use as a back-up to identify signature gatherers.
- The databasing team will do their best to track this in VAN (see below)

Extracting data from the VAN

- The data that goes into the VAN will get used by the PCEF campaign for the duration of the campaign.
- Each organization will get back the information on the signatures that they gather. VAN will enhance the data, i.e. it will add the phone number that is associated with that voter file to the data. Orgs can request this data at any time during the campaign.
- Designated person for pulling lists is [volunteer leader]. Please give 48 hours notice.
- Please note that [organization] is providing access to the voter file through the VAN but not sharing proprietary data (i.e. members and supporters and their email addresses). Coalition partners are asked to respect the proprietary data by only entering data into the system. Coalition partners are not permitted to export data from VAN and the [organization] reserves the right to rescind access if partners are found to have exported files. Partners must instead submit a request through [volunteer leader].
- Data that comes in unaffiliated with any organization will get tallied as “Freelance” and distributed to all steering committee members

PCEF petition verification flow

PCEF coalition VAN Database Leader, along with a team of volunteers, will use the VAN [organization] account to:

- Check to see that...
 - the signature gatherer has properly signed the sheet
 - that the sheets pass a visible review
 - each signer is a registered voter in the City of Portland (otherwise their signature is not valid) and check to make sure they haven’t already signed the petition
- Check the following boxes....
 - signed the PCEF petition (this is for tracking purposes, so that later in the campaign we can follow up with them, mobilize them to vote, etc.)
 - organization that gathered the signature. Skip this step if it didn’t come in from any organization.

VAN Access

- [organization] will create 10 general volunteer user accounts for database volunteers to use (i.e. when showing up for a databasing at the office). [volunteer leader] manages these accounts.
- [organization] prefers that people using VAN regularly request an individual VAN user account.

By requesting a VAN user account you agree to this MOU.

Agreed and signed by,

[Name, Organization, Date signed]

[steering committee orgs, orgs gathering signatures, and database leaders]

List Sharing Proposal for PCEF Steering Committee Member Groups

In order to win our historic ballot measure this November, we need to know who our supporters are and to get them to turn out to vote. Steering committee member groups contact lists are crucial to this effort. This memo outlines how Steering Committee (SC) members can share their member/supporter lists with PCEF to ensure a winning campaign.

The PCEF field team has access to the VAN (voter activation network) that allows us to identify and contact PCEF supporters, and to make sure that they come out to vote. **All Steering Committee member groups are asked to reach out to their member/supporter lists to bolster the campaign's efforts.**

Steering Committee organizations are requested to share their member/supporter contact info with field director/field team to be imported into the VAN. Organization should contact their members ahead of time to let them know that they'll be contacted directly by PCEF.

Data to be shared includes name, address, phone and email of members/supporters in Portland. If your database tracks their state ID, or any other information that will help match the individual in the VAN, please share that too. Partial information is still useful (ie. name, phone and email but no address). Organizations can opt to share some, but not all, of their contacts as is appropriate for their organization. (ie. share only members that are interested in environmental work, or leave off major donors, etc.)

The field team will use this information to call, text, and knock on doors to learn who supports PCEF and to turn them out to vote. They may also send mailers in support of the campaign. Once the field team has confirmed that the individual plans to vote for PCEF, they will not be contacted again until it is time to vote, when they will be reminded to vote. After they vote, they will drop off the outreach list.

Steering Committee organizations may opt to let the field team also contact their lists for volunteer recruitment.

If an organization cannot commit to sharing their list, they should talk to PCEF campaign manager about other options, such as committing to send PCEF emails to their lists on a weekly basis, etc.

Agreements

- [organization] sharing their member/supporter data with PCEF will have that data returned intact, and better that they sent it in.
- [organization] data will not be shared with other groups inside or outside the coalition or with any other campaigns outside of PCEF.

- [organization] data will be returned at the end of the campaign and will not be made available for future campaigns without the direct consent of the organization.
- [organization] data will be secure. Only field director and field manager have full access to the VAN.

Questions to be answered:

- Will this data be used by the fundraising or comms team to ask for money or other purposes? We need to make a decision about that. If so, need to track it and coordinate with field director for access. If not, we should add to agreements that they will not be solicited for funds.
- What to do with new people that come in directly to PCEF? Coalition needs to determine what to do with this data after the campaign. (We don't need to figure this out right now)
- Is there a reason to keep the VAN data for the coalition moving forward after the election?

Pledge Form



www.portlandcleanenergyfund.com



I Pledge to Vote Yes! for Clean Energy Jobs and Housing for All Portlanders

Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____
Name: _____	Street Address: _____	Cell #: _____ <input type="checkbox"/> Text me a reminder to vote.	Email: _____

Ballot Measure training 101

- First step - ballot title, determined by City Attorney
- The average person only thinks about politics 5 min/month
- Remember that we don't control the title
- Single-subject rule
- Three areas to consider: question, summary, \$\$
- For a November ballot, would need to collect 35,000 valid signatures by May 2018
- Get deadlines, goals, and backwards plan
- If you want to build capacity, make sure your template for signatures is approved by electoral staff
- Print on right paper, size, color, weight and ink
- Build a good rapport with the Elections staff
- Prepare for the push - set system to have volunteers, partners and paid canvassers
- You need to collect at least 30% more than 35,000 due to validity rates
 - Validity rate - 70% validity rate; 55% validity rate for paid canvassers; 80% for volunteers
 - Check for validity in Voter Activation Network
- Use those that offer signatures play a big part in GOTV
 - Remind them specifically
- Options for collecting - coalition outreach, pay a vendor, e-signatures, \$50 background check for paid petitioners, partner petition goals, volunteer petitions gathering
- Organizational structure - should energize/organize/mobilize grassroots energy, support nimble/fast acting decisions on 'campaign time', create opportunities for training 'apprentices at every level, support effective organizing and campaign implementation
- See sample organizational campaign structure (PAC, Campaign Strategist, Campaign Manager, Assistant Campaign Manager, Fundraiser, Field Organizers, Volunteer Manager, Office Manager, Spokesperson, Canvass manager, Presentation Manager, Database Manager, Social Media Manager, Treasurer
- Our money needs to be frontloaded as opposed to opposition in the end
- We could win with \$500,000 but \$1 mill or \$1.5 mill would be a safer bet
- Volunteer management
 - Volunteer petitions (building infrastructure)
 - Building volunteer lists (through grassroots tactics)
 - Membership outreach and phone banks
 - Building your friends, family and neighbors program
 - Create goals, and tracking system, and constant contact systems
 - House parties and community presentations
 - Ask hosts to bring snacks
 - Electronic recruitment does not work; direct recruitment and reminder calls is best

- Presentations must be targeted to audiences
 - Create a script
 - Train organizers and volunteers
 - PowerPoint and other materials
 - Create a list of groups to speak to, and identify targeted messengers
 - ASK! (Recruit volunteers and collect signatures)
 - Door knocking - #1 thing to do
 - Use Turf and Mini VAN to persuade and educate voters
 - Train volunteers for massive weekend canvasses
 - Paid Team of Canvassers during the week
- Training
 - Start with members
 - Partner administration
 - Volunteer recruitment management
 - MyCampaign
 - Materials - website, walk piece, buttons, site canvass turf grid (Can be a Google sheet where people coordinate where they will canvass), rules of petition gathering, scripts, FAQs, tips, welcome email
- Levels of communication
 - Email for the broad campaign
 - Email communication for Coalition
 - Templates and messages for Social Media
- Voter Activation Network - C3 and C4 access
 - More flexibility with C4 VAN
- Bike rack/meadow: 'frienemy' threats from the left
- Bike rack/meadow: How to integrate with other green/liberal campaigns
- Lots of dialing hours
- Pick and office for organizing hub
- Hot spot or site canvassing - MAX stops, high traffic areas, street fairs, farmers markets, flea markets, tabling events
- Turf builder - reach out early
- Create a friends and family canvassing system
 - Encourage volunteers, and organizers to take packets home and get friend to sign pledge cards, etc.
- Campaign messaging
 - Message development
 - Lead with the 'why' and the values, not the problem
 - Message Box tool
 - Different mailers by political party with unlikely messengers
 - Grassroots leaders are great messengers; still need to train on messaging

- Rapid responders needed to respond to good, bad and ugly in the media
 - Populist approach to personal stories from everyday people; will humanize the issue and build the movement
 - Testing/polling - test your language, knowing where voters are at
 - Identify inoculation messages
 - Can poll by party, age, gender, race, etc.
 - Pollsters
 - Opposition research
 - Follow what they're doing
 - PAC contributions
 - Sending people to their events
 - Track their rhetoric and activity
 - Use their money against them - call it out as a rallying cry
- **Bike rack/meadow:** How much to talk about race if republicans are a part of this
 - Don't hide the fact that this is about race and climate
 - We want to be a model
 - We don't need 100%; there will always be some
- Interplay of voter registration
- Roles exist for everyone!
- Campaign fundraising
 - Major donors (\$500 or \$1000+); prospects can be found via Orestar, personal and working relationships through leaders at the table, national major donors
 - Someone who has capacity, concern, and is willing to participate in the campaign
 - Crowdsourcing
 - Schedule with key campaign timelines
 - Make the pitch match your campaign tone and message
 - Work with partners for coordinated asks
 - Integrate with social media, videos
 - Don't ask for too much or too little
 - Earned media
 - Press events - do them at peak times/milestones of campaign - build calendar so 6-8 weeks prior to election there is at least one draw per week; idea of press event and volunteer training
 - Press advisory, media outreach, minute by minute, etc.
 - It's harder and harder to get people to come to a press conference so visuals/theatrical effect are key
 - When the big company makes a big donation, integrate messages with visual in front of a store, as an example
 - Editorial board meetings

- Open letters
 - LTEs
 - Paid media - schedule it out
 - TV
 - Radio (cheap and effective in some communities, e.g. Spanish speakers who only have 1-2 main stations)
 - Web (not particularly effective except in some cases) and social media (highly effective)
 - Other
- Get Out The Vote (GOTV)
 - Identify key voters
 - Voter database management
 - Voter Activation Network
 - Questions - what is our universe? How many people fall under 'persuasion' vs. GOTV? How did people vote in other election years?
- Priorities - quality conversations, reaching our people, lots of volunteers, good trainings, coalition outreach, planning for paid persuasion, planning for paid phones, planning for member to member organizing