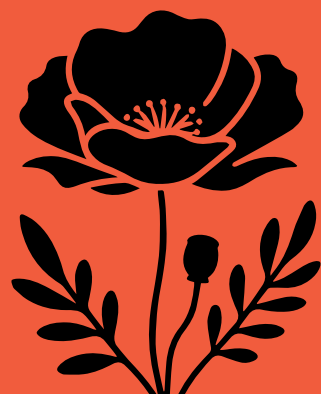




HOW RICHMOND MADE POLLUTERS PAY

Preparing for a Future
Beyond Oil

MARCH 2025



How Richmond Made Polluters Pay

Preparing for a Future Beyond Oil

MARCH 2025

Authors

Isa Flores-Jones, Nadia Khastagir, Sandy Saeteurn

with contributions from

Jose Luis Abastida, Lujain Al-Saleh, Marie Choi, Martha Gruelle, Kerry Guerin, Claudia Jimenez, Katt Ramos, Lazuli Trujano, Maggie Tsai, BK Williams, Megan Zapanta



TABLE OF CONTENTS

So You Want to Invest in Your Community (and Make a Local Polluter Pay)?	1
Questions to Guide Your Campaign	2
Core Phases to Build Your Ballot Measure	2
Campaign Overview	3
Local Context	3
Political Conditions	4
Working Towards a Just Transition	5
Our Measure	6
Critical Choice Points for Any Tax Measure Campaign	7
Strategy	8
Our Strategy to Win	8
Core Challenges and Conditions	8
Foundational Polling Research	9
Telling Your Story, Reaching Voters	10
Audiences	11
Structuring Your Campaign	12
Planning Your Organizing and Field Program	13
Key Learnings and Recommendations	14
Be Prepared to Win	20
References	21
Who We Are	21
Acknowledgements	21
Contact Us	Back cover

So You Want to Invest in Your Community (and Make a Local Polluter Pay)?

In 2024, a coalition of residents, community organizations, unions, and workers in the refinery town of Richmond, California, took on the city's biggest polluter—the Chevron Richmond Refinery—with a historic refinery tax measure. The Polluters Pay measure was led by environmental justice groups Asian Pacific Environmental Network (APEN) Action and Communities for a Better Environment (CBE) Action, alongside the city workers' union, Service Employees International Union (SEIU) 1021, with the support of local progressive council members.

The tax measure would have brought in \$60–90 million each year for the city of Richmond to pay for essential city services, clean up toxic sites, and prepare for future economic transition costs in anticipation of the projected decline in refinery product demand.

Building on decades of local organizing, our campaign delivered an early victory before the measure even went to ballot. Effective media work and a strong coalition forced Chevron's hand, and the City of Richmond won an unprecedented \$550-million settlement for the next ten years.

As of January 1, 2024, there are 132 operating refineries across the United States. Much like the Chevron refinery, many of these refineries have been profiting and polluting for decades. Each of these communities, and many others with similar extractive industries, will have tremendous transition costs associated with refinery closure or bankruptcy (see page 5).

While polluters continue to bring in record profits, many families struggle to meet basic needs. Potholes go unfilled while community safety and fire response remain underfunded. Oil and gas executives continue to profit from their operations while poisoning families and straining local infrastructure.

This playbook is for those who are looking to fund local municipal priorities and make local polluters and major corporations pay their share. It is meant for anyone thinking about the cleanup costs ahead of bankruptcy and economic disinvestment and to ensure that the transition is just and equitable.

We share this guide with other organizers, environmental justice advocates, local elected leaders, city staff, and unions in the hopes that your community can learn from some of the challenges, discoveries, and successes of our campaign.

REFINERY SENDS KIDS TO ER



photo, left: digital ad, Telegraph Media
photo, right: by Pablo Unzueta

Questions to Guide Your Campaign

- ◆ What is your campaign’s “bottom line?” What are the non-negotiable aspects of the campaign—outcomes or values? In other words, what will you define as a victory for your effort?
- ◆ What assumptions do people in your community hold about your target (the polluter)? What political relationships does the polluter have in your community? What has their past political spending been?
- ◆ Who sits on your City Council or County Board of Supervisors? What are their political interests and priorities? Do you have a champion on your local Council or Board?
- ◆ What information or research do you need to gather about the polluter? What data can back up your claims?
- ◆ Do you have access to and financial resources for expert polling and a paid media campaign?
- ◆ What kind of coalition will you need to build to pass your measure? Are you able to build or rely on an existing coalition?
- ◆ What is your capacity within that coalition to have dedicated staffers on this campaign?
- ◆ What are your assets: people power, resources, and hard skills (research, legal, advocacy, etc.)
- ◆ What are your fundraising goals?
- ◆ What is the narrative and media landscape? Who are the key audiences?

Core Phases to Build Your Ballot Measure



Phase 1: Foundations

- Legal and opposition research, first polling in March for feasibility and message testing
- Ballot specifics decided
- Overall campaign strategy set
- Develop communications strategy and timeline
- Prepare for launch



Phase 2: Launch

- Campaign launch/press conference in May 2 poll provided temp-check on measure
- City Council passes PP ordinance in June
- Build organizing lists: recruit and train volunteers



Phase 3: Paid Media/Fieldwork/Get Out the Vote (GOTV)

- Tracker polls
- Campaign event ahead of the election
- Hit the ground with volunteers



Phase 4: Implementation and Legal Defense

- Ensure the new revenue is well spent
- Protect our win in court from post-election challenges

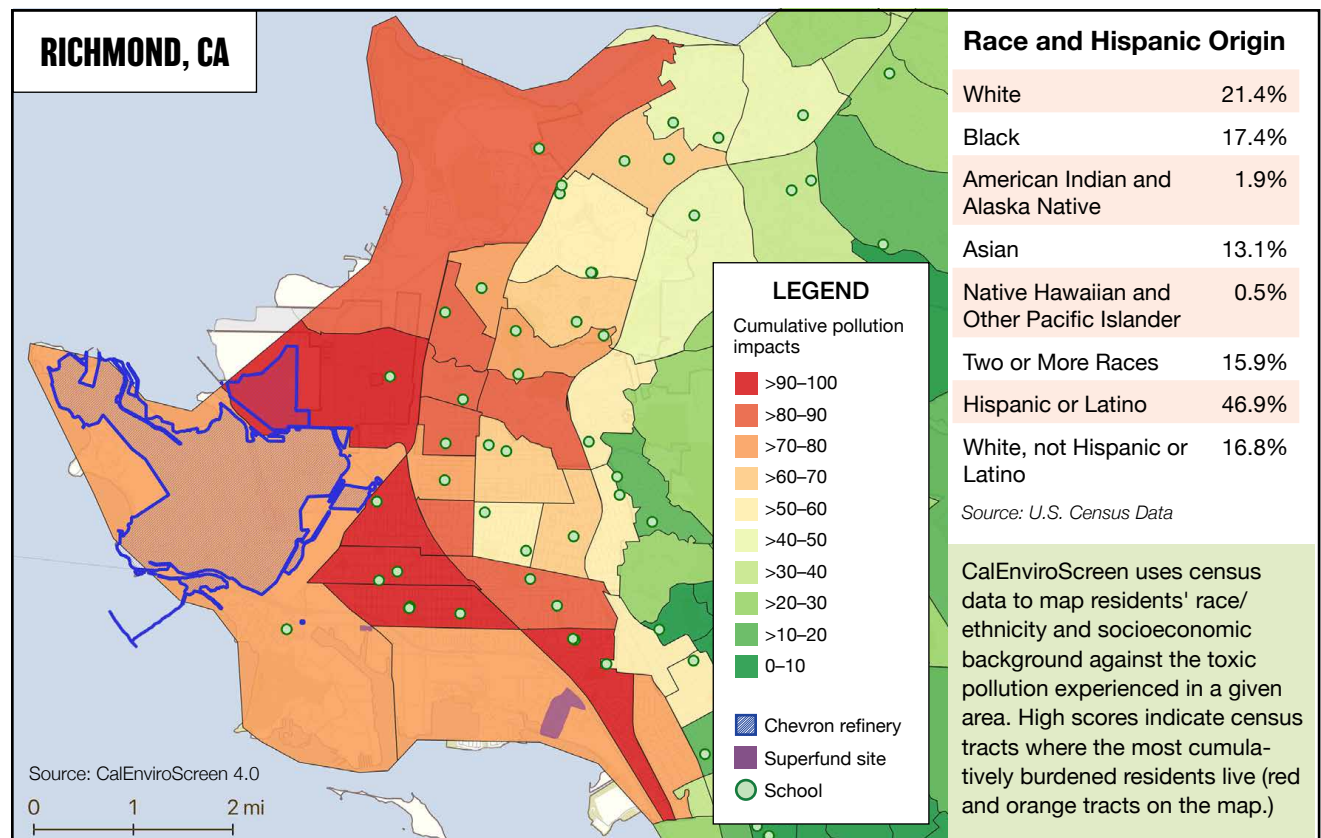
CAMPAIGN OVERVIEW

Local Context

Richmond, California, was incorporated as a city in 1905—just three years after Standard Oil (now Chevron) established their oil refinery. Tens of thousands of Black workers came to Richmond from the Jim Crow South, seeking jobs offered by the World War II shipyards. The defense and chemical companies closed, leaving behind Superfund sites, but the people remained.

Since the 1970s, immigrant and refugee communities, including Southeast Asian, Southwest Asian and North African (SWANA), Mexican, and Central American residents have made Richmond home. Richmond is still a majority working-class city of around 114,448 people, with an increasing Latino population.

For decades, major refinery disasters have sent Richmond families to the hospital. Oil spills and smoky chemical flares are visible reminders that higher rates of cancer have been linked to living close to oil refineries.¹ Across Richmond, residents have **asthma rates higher than 90% of other California residents.**² Children suffer from asthma at a 25% rate, almost double the California rate of 13%.³ Working class communities of color living close to the refinery's fencelines endure the highest levels of toxic pollution, sickness and death (See: CalEnviroScreen map below)—but no part of Richmond has been untouched by refinery disasters and chronic pollution.



1. Stephen B Williams et al. "Proximity to Oil Refineries and Risk of Cancer: A Population-Based Analysis," JNCI Cancer Spectrum, Volume 4, Issue 6, December 2020, pkaa088, <https://academic.oup.com/jncics/article/4/6/pkaa088/5919078>
2. CalEnviroScreen 4.0 Data Dashboard <https://experience.arcgis.com/experience/6b863505f9454cea802f4be0b4b49d62/>
3. According to an ongoing research project by LifeLong Medical, UC Berkeley, and UCSF, Richmond Environment and Asthma Community Health (REACH) Study, <https://clear.ucsf.edu/reach>

▶ Start with opposition research: Get to know your polluter. Start with local history, their business revenue, local tax payments, political contributions and record of public greenwashing. Who are their allies? How much will they spend to oppose your campaign?

In 2023, Chevron made \$21.4 billion in profits,⁴ paying their CEO a bloated \$26.5 million that year.⁵ Today, Chevron is the second largest oil company in the U.S. Despite making billions in profits, Chevron and other industrial polluters have cost many Richmond residents their health, while failing to pay their share in taxes.

Instead, Chevron has poured millions into local and statewide oil lobbying efforts. Donations to local nonprofits, schools, libraries, and hard-fought community benefit agreements (won thanks to the organizing of community activists) are repackaged as proof of the oil giant's "neighborly" presence in Richmond.⁶ Corporate philanthropy, of course, is cheaper than paying higher taxes: Chevron continues to pollute local politics while shirking environmental and corporate

accountability. *The Richmond Standard*, the oil giant's media outlet, provides Chevron's spin on local news.

But Richmond—home to a progressive political community of environmental justice, labor, and racial justice organizers—has rarely only been on the defensive.

Political Conditions

“I was terrified. Most of all, I was scared for my little sister, who was only two years old,” said Rafa Castro-Chavez of Urban Tilth, describing the 2012 fire. “Watching the news, we learned that many people ... were going to the ER. I rushed into action, shutting the windows and covering any gaps with wet towels. My whole family slept together in the living room that night—the only room in the house that didn’t smell like burning plastic.”

Over the past twenty years, Richmond residents and progressive organizers have worked to take City Hall back from a political alliance fostered between Chevron, the city's police union, and real-estate developers. Years of bureaucratic stagnation and Chevron's control of City Hall had brought the city to bankruptcy.

The Richmond Progressive Alliance (RPA) was formed to combat the dirty politics in the city, and only backed candidates who rejected corporate donations. The 2006 election of Mayor Gayle McLaughlin, the co-founder of the RPA, was a turning point for residents' health, well-being, and the city's finances. In 2007, residents campaigned to pass a first Chevron tax, "Measure T." While the courts struck down Measure T, this first effort demonstrated the popularity of a tax on the oil giant and reinforced the need for a truly airtight and legally defensible measure.

Five years later, Richmond's organizing infrastructure was soon to be tested again. On August 6, 2012, the Chevron refinery exploded in flames—the result of a corroded, leaky pipe. The fire burned for more than five hours and endangered scores of refinery workers. The black, toxic smoke sent 15,000 residents to local clinics and emergency rooms that day.

4. News release, "Chevron Reports Fourth Quarter 2023 Results," February 2, 2024, <https://chevroncorp.gcs-web.com/static-files/4effcd00-378a-4f24-9846-8e6dcd40b8bd>

5. Collin Eaton and Jenny Strasburg, "Oil Profits Keep Flowing for Exxon and Chevron," *Wall Street Journal*, February 2, 2024 <https://www.wsj.com/business/energy-oil/oil-profits-keep-flowing-for-exxon-and-chevron-458b3b83>

6. The 2014 Community Benefits Agreement and Chevron's "Richmond Promise," scholarship program, for example, was the result of local organizers' efforts to resist the refinery expansion and added pollution.



APEN Action members enjoy banh mi at the June 2024 rally at City Hall.

For years, residents had feared a disaster like the 2012 fire. Environmental justice organizations like APEN and CBE, alongside the RPA, quickly launched a series of town halls and led a massive campaign to try and oppose a new expansion project at the refinery. In the years to come, and despite a nearly \$3-million dark-money blitz by Chevron, community activists and progressive groups succeeded in electing a progressive super-majority to the Richmond City Council for the first time in Richmond’s history. Richmond residents were fed up.

“ We have to think of the future. Richmond has been a refinery town for the past 100 years—but it won’t be a refinery town 100 years from now.”
—Mayor Eduardo Martinez, introducing the Polluters Pay ordinance on May 21, 2024, at the Richmond City Council.

Working Towards a Just Transition

In 2019, nearly 3,000 miles away from Richmond, California, a massive fire ripped through another ancient refinery. Residents sheltered in place for over 24 hours next to the Philadelphia Energy Solutions refinery as clouds of highly toxic gas poured into the air.

This time, the damage was permanent: private equity investors had shuffled the property between hands before finally declaring bankruptcy a month before the explosion, leaving taxpayers with the heavily contaminated land. Cleanup cost estimates for the Philadelphia Energy Solutions refinery, the oldest refinery on the East Coast, stretched into the hundreds of millions.

Closer to home, in October 2020, the Marathon oil refinery in Martinez shut down after 100 years of operation, laying off hundreds of union workers. Two years later, Marathon reopened as a biofuel refinery, enabling the corporation to rake in \$74 million a year in state subsidies,⁷ continue polluting the air and bodies of local residents, and avoid cleanup costs—without hiring back the laid-off union workers.

For residents, workers, and elected leaders studying these examples and others like them, the threat and opportunities for Richmond’s future became clear: we needed to plan now for a refinery transition ahead of closure, bankruptcy, or the next major disaster. As California sets timelines for

7. Marathon’s estimated daily output will be 17,000 barrels of biodiesel. At \$0.40-0.45 a credit per gallon at 42 gallons in a barrel, the LCFS credits for a single day of refining would be \$286,600. A working year of 260 days would bring the total credits to \$74,256,000.

the last gas-powered car to leave production lines, cities and counties have the ability and responsibility to implement policies to offset plant closures and the clean-up costs.

It's time to make these major polluters pay.

Our Measure

By December of 2023, with a major general election year approaching, our coalition moved forward with a new plan to Make Polluters Pay. We had two choices for the kind of ballot measure we would run [see: "Critical Choice Points" below]. Given Richmond's progressive local leadership on council, the lessons learned from previous efforts to tax the major polluter, and a powerful corporation anticipated to spend millions against us, the Polluters Pay Campaign opted to run a Council-referred general tax. Together, we set the following goals:

Campaign Goals

1. Win 50% + 1 of the votes in Richmond, California, to pass the Polluters Pay measure.
2. Secure funding for essential needs, services, and refinery cleanup and transition costs.
3. Build people power and knowledge of the polluting impacts of oil refining and the need to start to prepare today for a future beyond oil.

Our Measure

"For general government use, including City services and programs such as clean air and water treatment, parks, roads, fire and emergency preparedness and response, and improving public healthcare and youth services, shall the measure establishing a tax on the privilege of conducting oil refining, volumetrically at a rate of \$1.00 per barrel of input feedstock, estimated to generate approximately \$60 million to \$90 million annually, until ended by voters, be adopted?"



A still from our digital ad campaign, which ran on local news outlets' websites.

▶ Critical Choice Points for Any Tax Measure Campaign

Structure of the tax

We taxed “input feedstock” — currently crude oil or petroleum — coming into the refinery at a rate of \$1 per barrel. If the refinery transitioned to processing other types of biomass, our tax would also have applied to other types of “input.” Our measure was developed in the context of California law — depending on which state you’re in, other state laws may impact the design of your measure.

Where should the money go?

Once we clarified how the money would come in, we had another decision to make. If we limited the types of spending for our measure, it would become a special tax and, since it was Council-referred, have a two-thirds voter threshold. We opted instead for a *general* tax, meaning the revenue would go to the *general* fund, and the measure could pass with a 50% + 1 threshold under California law.

Is the measure even feasible?

We tested the strength of our ballot measure language with a poll of Richmond residents. How does your ballot language poll side-by-side with possible oppositional messages? In our surveys, a definitive majority of Richmond voters supported the Polluters Pay concept so we knew we had a strong shot at victory.

Choose your pathway to the ballot:

OPTION 1. Citizen-referred (Signature gathering): Gather 10% of registered voters’ signatures. This route allows organizers to lay the narrative groundwork and popularize the idea of the measure ahead of time. *Check the timelines and qualification thresholds with your city and review with a lawyer—there are unique deadlines to qualify an initiative depending on your local jurisdiction.*

- A strong volunteer and/or field program will be needed to gather signatures!

OPTION 2. Council-referred: Advocate at your city council to pass an ordinance to place a ballot measure before the voters. The trade off (depending on your conditions) means that the council will have final say on whether or not to proceed, but it may also give the municipality a chance to edit it to make it easier for them to implement — avoiding issues further down the road.

- Due to Chevron’s ability to outspend us, we chose option 2 and traded the extra organizing and “norming” of the tax that usually comes with a signature-gathering campaign for an early and aggressive start to our campaign.

Coalition buy in: do you have the people and organizations you need?

We started as a coalition of environmental justice organizations and the City workers’ union, SEIU 1021. Together, we built out a coalition of unions, community-based organizations, and health organizations. For a full list of our endorsers, please see page 21.

Campaign planning: do you have the staff and resource capacity in each organization?

A campaign of this size will consume a sizable amount of organizational time and staff resources. We identified core roles and hired consultants where our staffing capacity was low.



Photo: Megan Zaparita

Residents discuss refinery flaring at a townhall meeting in Richmond, 2024.

STRATEGY

Our Strategy to Win

- 1. Frame the problem and the choice.** Corporations like Chevron might have massive resources, but their wealth has been built at the expense of people's well-being and to the tune of millions of dollars in healthcare bills. We planned to build on the years of local organizing with poll-tested messaging that reminded voters how little the polluters pay versus the residents who breathe their pollution every single day.
- 2. David vs. Goliath meant strike first.** Outpace the opposition's campaign if we can't outspend it. Chevron's resources will always outmatch us. We needed to frame the issue first and be able to pivot quickly to succeed. This meant starting with an early media and organizing program.
- 3. Invest in a wrap-around paid media and earned media program.** In order to reach both the base and persuadable voters, we needed an electoral paid media program to get ahead of Chevron's messaging and respond to attacks. Cultivating local and reliable spokespeople was a key strategy to get quotes in the media from residents and experts.
- 4. Evidence-based field program to reach our target voters.** Identify core audiences and talk to them! Richmond is a small community and past campaigns like the successful progressive Mayor and City Council races have demonstrated the impact of a strong field program. Due to the decades of canvassing in Richmond by community-based organizations (CBOs), Richmond residents and voters are able to identify the truth we're telling from the lies Chevron is selling.

▶ *What is the narrative landscape?*

▶ *Who are the key audiences and what are their concerns and values?*

Core Challenges and Conditions

The following political challenges led to some of the strategic choices for our campaign:

- 1. Lack of public trust in government.** Across the Bay Area, as in much of the State, voters increasingly indicate that they do not trust local governance and government. Given that our measure was a general tax for the general fund and would be administered by the City Council, this lack of trust was identified as an immediate narrative challenge for our campaign. If the measure had continued to November, we planned to make the campaign a referendum on Chevron, rather than on the City itself, to counter the lack of faith in government.

2. Industry tends to get litigious (and sneaky). No corporation will take kindly to an additional tax measure. From the example set by Measure T (see: Political Conditions, page 5) we knew that our campaign would be examined under a highly-powered legal lens—it is likely that yours will be, too! Planning for different scenarios with a legal team and preparing your coalition is critical. Be prepared for litigation throughout the entire life-cycle of the measure from placement on the ballot to implementation. It is very common for any ballot measure to face legal challenges by opponents seeking to end your campaign in the courts.

- ◆ *Courts are hard to predict!* Our measure faced a pre-election challenge to the wording of the ballot label. Opponents argued that since the ballot label listed examples of City services, it was misleading without a guarantee of how the money would be spent. Despite past court decisions supporting our view, and although 80% of other general taxes in California were just like ours, the court agreed with our opponent. Setbacks like this can quickly shift the momentum in a campaign.

▶ *What conditions exist that will inform your strategies?*

Foundational Polling Research

An early poll was necessary eight months out to test feasibility for the campaign and for buy-in from coalition partners and elected officials to support a Council-referred measure. We paid for a professional polling firm to test feasibility and identify core messaging for the campaign.

Because we were on the “Yes” side of this ballot measure, our poll needed to show at least 60% support in order for the campaign to be seen as viable. Past campaign cycles and electoral mentors cautioned us: It’s always harder to run a YES campaign than a NO campaign. We also relied on the polling crosstabs to identify a “base” (voters we identified as likely supportive) and “persuasion” universes (voters we would need to persuade).

We planned to track support throughout the campaign and did a second tracker poll in June–July to gauge the success of the messaging. The third tracker was planned for September–October in the run-up before the elections.

The increase, or at least consistency, in support from March to June told us we were building in the right direction to reach voters and illustrated the relative success of our messaging versus the opposition’s messaging.

Goals:

1. Determine viability of our measure concept, structure, and language (Round 1)
2. Identify and test messaging to move segments of our voting audience via head-to-head testing of our messaging against what we predicted our opponent would say (Round 1 and Round 2)

Outcome:

1. Yes, our campaign was viable.
2. We confirmed that the message of “Polluters pay so we don’t have to” was popular with our core demographics—and we ran with it for our campaign!

▶ *Do you have the resources to hire professional firms for polling, research, and paid media?*

Telling Your Story, Reaching Voters

“Speaking in a room packed with Chevron supporters was intimidating—but mostly, it infuriated me to hear Chevron’s talking points deny the public health data,” said Lazuli Trujano, an organizer with CBE Action, describing their experience at the June 2024 City Council meeting. “I focused on the stories of people who are sick due to living close to the refinery. I shared neighbors, friends, and loved ones’ experiences of asthma, cancer, and the constant fear of refinery disasters. I left the podium empowered to continue defending the voices of my community.”

We worked to build a program of earned and paid media to shine a light on Chevron’s role as a major local polluter undermining community health. We aimed to reach our target voters several times with our frame and messaging before they cast their ballots in November.

◆ Earned media (news reporting: print, television, and radio)

Goals:

1. Reach and persuade Richmond residents to vote for the Polluters Pay measure.
2. To win voters, lead with the following frames:
 - Chevron needs to pay for and clean up their toxic mess—so we, the people of Richmond, don’t have to
 - Establish culpability of the oil giant: Chevron has contributed to 100+ years of refinery pollution, health problems for residents, and hundreds of millions of dollars in medical bills
 - Establish our trusted messengers and our campaign as “from-and-by the Richmond community” and establish relatability: we are Richmond, parents, workers, members of the community (not special interest groups or outsiders)
3. To set us up for the longer-term policy fights, establishing the fund would both:
 - Pay for essential services for Richmond residents
 - Ensure polluters are paying into a cleanup fund ahead of closure and transition

◆ We prioritized community messengers to focus attention on the “what” (deliver essential services to address real problems in the community) rather than the “how” (via the procedural, city governance).

KRON 4

‘Historic settlement’: Chevron to pay \$550M to Richmond

by Hamsa Fahmy
August 14, 2024

KQED

Richmond Oil Refining Tax on Chevron, a Major Polluter, Moves Closer to Ballot

by Laura Klivens
May 22, 2024

POLITICO

Can a ballot initiative transform Richmond from a refinery town?

By Will McCarthy
07/15/2024

Audiences

While Richmond voters composed the majority of our audience, we identified the following groups as core audience members for different stages of the campaign:

◆ **June–July primary audience:** members of our organizational base, environmental justice and climate justice activists, City Council members

◆ **July–August primary audience:** high propensity Democratic and no-party-preference voters

◆ **August–November primary audience:** persuadable voters: Latino and Black Democratic voters, high propensity no-party-preference voters

NOTE: *Our core audiences shifted as the campaign continued. Additional tracker polls would have provided more specificity.*

◆ **Paid media** (mailers, digital ads, billboards, television ads) were a cornerstone of our campaign. We started to run ads as soon as the council voted to place the measure on the ballot and launched our 15–30 second digital ads in the local outlets as well as on Youtube, Facebook, and Instagram.

We knew the ads were effective: people we canvassed and even Chevron spokespeople confirmed they had seen the ads. “Click-through rate,” (the number of times someone engaged with our ad) and “through plays” (the number of times the video is played start to finish) confirmed that residents were watching.

Had the campaign continued to November, we would have run billboards, produced mailers, and “over the top” (commonly abbreviated as “OTT”) streaming ads running on popular streaming platforms. We prioritized this paid media budget, anticipating that streaming ads would be most expensive, followed by mail and then billboards.

▶ **Legal review is critical for all materials. Build in time in the production schedule for review and edits to ensure election law compliance and consistency with your measure itself.**

◆ **Digital organizing.** Weekly emails went out to our volunteer and supporter lists with opportunities, campaign updates, and key endorsements. A public-facing website absorbed more volunteers and shared core campaign goals.

◆ **Social media** [sharing, posting to X, Instagram, Facebook] was a lower-tier priority for the campaign. Social media was a place to engage those who are on board with us already, to build grassroots support, and to host the digital ads we were running as part of the paid program.

▶ **Use a professional media firm and don't try to write, edit, produce, and run all of your paid media in-house!**

NOTE: Our coalition determined that hiring an outside media firm was necessary to provide the expertise to create and purchase digital advertising and provide support for design, production, and distribution of campaign materials (mailers, literature, etc.)

Structuring Your Campaign

To confront and respond to quickly changing conditions, it was crucial to establish a solid decision-making and roles structure within our coalition. Here are some of the central roles and committees that guided our campaign:

STRATEGY AND DECISION-MAKING

Core decisions:

Ballot Measure Committee:

- Campaign Manager (from APEN Action) >>>
- Consulting Core Team from lead organizations: organizers, political directors, communications, field manager

Legal guidance:

Two rounds of review:

- internal review by a movement lawyer with CBE Action
- a firm for compliance and support for the Ballot Committee

SAMPLE OF COMMITTEE STRUCTURE

Core	Campaign management & overall strategy Who: Campaign Manager, Political Leads from core organizations
Endorsers	Receive updates & asks for volunteer requests, comms support, provided feedback on how campaign was received within groups/ memberships/bases
Organizing	Small business outreach <ul style="list-style-type: none"> • Presentations to neighborhood councils & community groups • Organizing rallies & leader events • Engaging members & staff into volunteer roles • Rallying & advocating at council
Comms	Executing earned media, social strategy; managing paid media strategy
Field	Coordinating field strategy

COALITION

Organizing tier:

Local legacy orgs should put in time and consulting on decisions, big events, big canvassing days

Endorsing organizations / supporting organizations:

Have clearly defined responsibilities (flyering, pulling in other endorsements, turning out at the City Council meetings, etc.)

Comms committee:

Made up of staff from coalition orgs to share press pitching, media lists, and identifying different spokespeople

▷ *What is your coalition's capacity to have dedicated staffers on this campaign?*

▷ *What are the relationships like within the coalition?*



Richmond community leaders, doctors, and union leaders speak at the June 2024 rally.

Planning Your Organizing and Field Program

While our campaign came to an end before the final GOTV effort, we staffed up and prepared for a volunteer program that would phone and knock doors in key Richmond districts.

May–June: Rallying to City Council

We introduced our measure with a bang. We rallied residents to two City Council meetings, vastly outnumbering opposition speakers at the first meeting, and turned up the energy and volume at the second Council vote with a rally and press conference.

Prep included: music, food, banners, and screen-printed and hand-drawn signs (created at an art-build beforehand)

August–September: Phone Sweep

Starting in August, we launched a phone program that reached hundreds of Richmond households and confirmed what we had also seen in our polling: our measure was overwhelmingly popular with core audiences.

September–October: Doors and Community Canvasses

We prepared to launch our team with both paid staff and a volunteer program to knock on doors up until November. Our coalition built on existing best practices for Richmond to create our field plan.

We were building a volunteer list from endorsing organizations and supporters from inside and outside Richmond who were excited to join. We worked with members to plan visibility events and actions, including a banner drop and campaign rally.

Volunteers talked with voters at neighborhood block parties, local farmers markets, coffee shops, and grocery stores to garner support for the campaign. We reached out to small businesses and mapped local neighborhood councils and faith-based institutions.

▶ ***Where do people meet or gather in your city or community? What events can you attend or table at—for example, farmers' markets, picnics, parades, night markets?***

KEY LEARNINGS AND RECOMMENDATIONS

We share these reflections and tips so you can build upon our learnings.

Calendaring/Timeline

Plan around your local filing and election deadlines, city council schedule, and local events. These dates—and your organizing timeline—may vary by city or county.

Sample Timeline



Timeline	Planning and Action Steps
Up to 5 years ahead	<ul style="list-style-type: none"><input type="checkbox"/> Community visioning processes to understand goals for a local just transition and impacts of current refinery pollution: understand membership/constituencies' priorities, including community surveys, series of meetings with local residents, organizations
1–3 years ahead	<ul style="list-style-type: none"><input type="checkbox"/> Legal research, feasibility of your idea, coalition-building<input type="checkbox"/> Popularize the problem/solution—start building towards the campaign launch<input type="checkbox"/> Develop fundraising strategy and plan<input type="checkbox"/> Find consultants if needed
1 year ahead	<ul style="list-style-type: none"><input type="checkbox"/> Decide on the mechanism for your measure: citizen-referred vs. council-referred (or even earlier!)<input type="checkbox"/> Identify elected champions/supporters for your campaign<input type="checkbox"/> Determine/decide ballot specifics<input type="checkbox"/> Set overall campaign strategy◆ TIP: Know your filing dates, city charter, county board meetings, and other key deadlines. Power map your community.
8–9 months out	<ul style="list-style-type: none"><input type="checkbox"/> Polling: the sweet spot for polling depends on whether you are running a citizen-referred or council-referred measure. For our measure, we polled eight months ahead, leaving us time to build campaign materials, but not too far from the election!<input type="checkbox"/> Confirming vendors and contacts for paid media, ad placement, graphic and video design and production<input type="checkbox"/> Bring in your coalition: discretion and strategy allowing, start to seek endorsements for your campaign<input type="checkbox"/> Produce and manage round one of video ads (writing, filming, editing should be done by a media firm!)
6–7 months out	<ul style="list-style-type: none"><input type="checkbox"/> Develop communications strategy and campaign branding<input type="checkbox"/> List building—volunteers, supporters, donors<input type="checkbox"/> Confirm key endorsements: unions, faith groups, other community leaders who reach voters and have standing in the community<input type="checkbox"/> Public campaign launch<input type="checkbox"/> Launch digital ads across social platforms, online papers





3 months out

- Voter identification and persuasion canvassing/phone program
- Volunteer recruitment (intensive)
- Billboard goes up
- Mailers designed 1–2 months out

6 weeks out

Note: *We didn't get here with our measure—the following is our best-laid plan for how we *would* have run our campaign!*

- Volunteer recruitment and field canvasses/phones
- Industry-standard—this might change depending on your budget and voter universe: buy the equivalent of at least 1,000–1,500 gross rating points per ad on a combination of broadcast, OTT, CTV, and cable/satellite
- Mailers go out
- GOTV canvassing, phoning
- Op-ed placed in local outlet

3 weeks up until Election Day

- All-out field program: knocking, phone banking
- GOTV visibility event
- GOTV earned media
- Send out last mailers
- Last round of digital ads running



Post Election Day & Victory

- Implementation and budgeting: how will your coalition work to ensure that the city/county follows through to invest the tax funds?
- Coalition alignment
- Advocacy or campaign work at council

Campaign Management and Hard Decisions

- ◆ Plan and clearly delegate roles for proactive campaign management. Plan for clear, coordinated timelines and bottomliners for the different components and tactics of the campaign. Create an internal decision-making structure with leads who are empowered to “call the questions” and propose and execute shifts in strategy.
- ◆ Prepare for hard decisions ahead of time. Think about early settlement offers—they may come earlier than anticipated. Discuss and address the following questions: What constitutes “victory” for your campaign? How might that definition vary across your coalition partners? What unique pressures are faced by your campaign partners (e.g., organizing capacity, funding that will expire if not used for this campaign, reelection and public scrutiny for public officials, and/or your community’s ability to handle litigation)? What does settling now allow you to avoid or get to faster? How does a win, by settlement or by election, set you up for your next battle?

Coalition: Partners, Allies, and Moving Political Power

- ◆ Build a strong coalition: Identify community leaders who can inform, motivate, and provide feedback to/from their constituencies. Agree on clear commitments and roles for partner organization campaign staff and make clear requests for materials production and thought-partnership. Identify representatives who can be featured in campaign storytelling and media.

- ◆ If you are working with a public relations consultant, share the scope of work of that consultant’s work with the full coalition. Share examples ahead of time so that the coalition understands the look and feel of the electoral communications materials. Request memos or strategy check-in points from consultants and review together as a coalition to stay aligned.
- ◆ Stay powerful and united. Isolate the opposition and don’t let them divide your coalition or spokespeople. Stay consistent with your framing (i.e., “oil giant” or “big polluter”). Your community members have powerful personal stories that will burn through the opposition’s spin.

Research

- ◆ Foundational research—including pollution impacts, tax stats and studies on health outcomes—is critical to building and keeping trust with your coalition, voters, and reporters.
- ◆ Profiling the polluter:
 - ◆ Commission a researcher for opposition research on the polluter
 - ◆ Document the air quality violations locally to frame the cause of harm and the cost of that harm (check CalEnviroScreen and your local Air District)
- ◆ Power map your community. For helpful resources, visit: <https://commonslibrary.org/guide-power-mapping-and-analysis/>



Photo: Isa Flores-Jones

Art builds—to create banners, signs and other props for rallies—are a fun, collaborative space for people to plug into the campaign and build relationships.

Tax Structure

- ◆ What's the best structure for your tax? Before launching the campaign, research and develop a defensible measure.
 - ◆ In California, a *special* tax is a tax that is collected and earmarked for a specific purpose and deposited either into a separate account or a city's general fund. A two-thirds vote of the electorate is required for a local government to impose, extend or increase any special tax. A 50 + 1% vote is required for any citizen-referred initiative to place a special tax—although in California, a powerful anti-tax lobby has tried to challenge this cut-off.
 - **Pros:** Easier for voters to understand where the tax funds will go, less advocacy and policy battles later on
 - **Cons:** Higher threshold to pass—66% vote for a council-referred measure to place a special tax, greater effort and organizing work needed to collect signatures!
 - ◆ A *general* tax is a tax imposed for general governmental purposes, the proceeds of which are deposited into the general fund. A majority vote of the electorate (those voting on the measure) is required to impose, extend, or increase any general tax.
 - **Pros:** Broader parameters for use of funds, advantage of surprise if council-referred, lower threshold to pass (51%) if council-referred
 - **Cons:** Uphill media battle given general public's lack of faith/trust in local government and uncertainty as to how funds will be spent

Legal

- ◆ Build in time for your legal team or lawyer to review policy and materials at every step. Always strive to balance and assess risk between what's needed for campaign momentum versus any legal caution. Electoral campaigns have strict rules and regulations that could result in fines or legal risk to your organization.
- ◆ You will need two kinds of legal review (they can sometimes come from one legal counsel or entity). In our case, we contracted two separate legal firms:
 - ◆ Campaign legal compliance and counsel: setting up your ballot committee paperwork, reviewing your ad disclaimers, donor disclosures, political reporting
 - ◆ Policy and measure language guidance: We were fortunate to have the legal guidance of a movement lawyer working with CBE Action to support various rapid-response decisions throughout the campaign. We also relied on support from an external firm for vetting ballot measure language.
- ◆ Anticipate early lawsuits: Build city council and coalition members' confidence in the measure and the long game early on—no matter when or if you face a lawsuit! Prepare a rapid-response plan ahead of time.

Polling

- ◆ Polling is a critical part of building a ballot measure campaign and an essential tool for testing the viability of your measure and developing messaging and targeting. Prioritize polling as a tool for organizing, fundraising, getting supporters on board, and testing messages.

- ◆ Hold trainings and skill-shares within the coalition on how to construct and read polls to support the decision-making of communications staff and campaign leads.
- ◆ Decide how and if the polling data can be used as a media tool. Use caution and be strategic about releasing the numbers and assess where those numbers are most helpful for you. If they are not strong enough to intimidate your opponent, then seek other strategies.

Media

- ◆ Bring in economic and legal experts to engage with reporters and preemptively counter any of the opposition messaging. Having the experts onboard will validate your claims in the face of the challenges. Lead with the research.
- ◆ Be prepared for the opposition’s fear-based messaging (for example, “This tax will raise gas prices”) and counteract it with sound research and community-tested messaging of your own. Don’t repeat their messaging in order to rebut it—focus on your own!
- ◆ Corporations like Chevron have the resources to file lawsuits to generate media in their favor. How can you build and grab media cycles with your budget and capabilities? What opportunities are there for interventions? What other organizing or communications tactics do you have access to?



Social media post.

Organizing/Field

- ◆ Communications and media work cannot replace organizing. Spokespeople should come from existing relationships in the community. Create a political education curriculum for your community to build momentum. Get boots on the ground and start talking to residents in the build up to the launch to prime the wick of the narrative. Give volunteers creative ways to join or offer their skills, such as with art builds.
- ◆ Start early for canvassing with volunteers/canvassers so that they can practice and feel comfortable with campaign talking points.
- ◆ Identify where your relational gaps are with influential groups such as small businesses and neighborhood councils and proactively engage them before the opposition gets to them.

Making Your Case at City Council

- ◆ Testimony at council meetings is both an organizing and a communications priority. Public comments at council meetings shape the media coverage and are often the content of early reported pieces. By getting your endorsers on board early their constituencies can be prepared



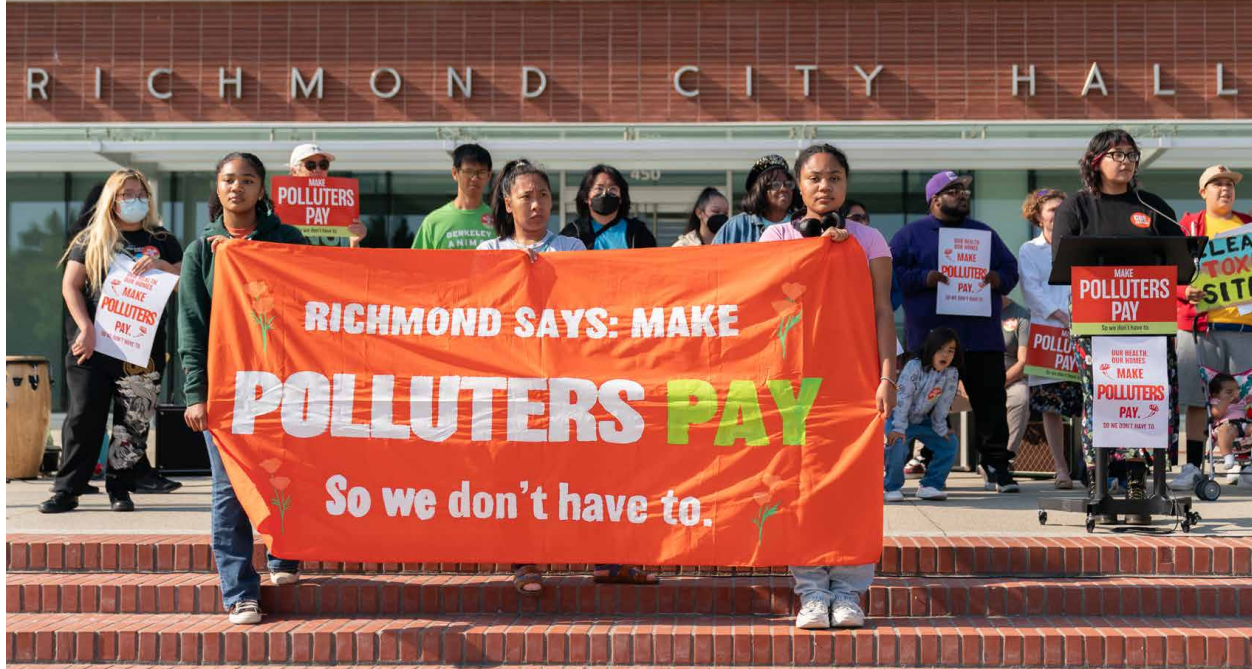
Turn out at City Council in June.

to turn out and share their experiences of living near a major polluter and their hopes for their city. In our case, Chevron brought in their employees to pack the City Council meetings and oppose the measure—be prepared for the opposition to turn out strong!

- ◆ Have designated roles filled to film videos, photograph, and document any big mobilizations.
- ◆ Check for possible lobbying registration and reporting requirements. Advocating for the city to place a measure on the ballot is generally considered lobbying and may be subject to disclosure requirements, depending on the jurisdiction.

Fundraising

- ◆ Political fundraising is subject to many legal restrictions. These are different, state to state. Have professional legal counsel for election compliance at a minimum. Otherwise, you run the risk of severe state penalties. We recommend contracting either a professional election compliance firm or a dedicated bookkeeper familiar with election compliance, nonprofits and political fundraising, to file reports and to serve as the committee treasurer. In California, due to strict political donor Sunshine Laws, some political contributions are required to be filed within 24 hours.
- ◆ In California, nonprofits that raise funds for their general accounts for ballot measure activity may subject the organization’s donors to public disclosure. Generally, nonprofits should only solicit funds for ballot measure work into a separate ballot committee.
- ◆ In our campaign, we balanced institutional with grassroots fundraising from public foundations and individual donors. We built a grassroots fundraising structure with call time, email fundraising, and hosting house parties.
- ◆ Your fundraising should match the budget for your campaign, which should be calculated from your expected win number and voter targeting strategy. Campaigns typically need to find a balance between field costs and paid media. Paid media costs can often run into six-figures depending on the type of media and your local media market (for example, large urban media markets like Los Angeles or the Bay Area can be very costly).



BE PREPARED TO WIN

The Polluters Pay campaign intended to go all the way to November to pass our measure and tax Chevron between \$60–90 million a year. From a temperature check in the form of a second July poll and feedback from voters in the community, the outlook was promising. Prepared to make calls, email, and knock doors straight through to Election Day, we felt optimistic about our chances of victory.

By August, it seemed that the oil giant had reached the same conclusion: the Polluters Pay measure was on track to sweep the vote in November.

In an unprecedented move, Chevron requested talks with the City Council and finally agreed to a historic \$550 million dollar settlement for the City of Richmond. It was a compromise: less than the amount of the full tax but still enough to fund essential services and jump-start badly-needed refinery transition planning.

Our campaign had not planned for a pre-election settlement and coalition members faced a range of emotions: disappointment, victory, and relief. But everyone recognized that we had put Chevron on the defensive. Our grassroots campaign forced the oil giant to offer up \$550 million to the people of Richmond. A new way to think about the settlement emerged: what if we were, in fact, winning... ahead of schedule?

Working for a just transition requires us to think in the short and long-term, beyond one campaign cycle. As movement organizers say: “If we are not prepared to govern, we are not prepared to win.” Too often, our movements are stuck playing defense—fending off attacks on our personhood, livelihoods, health, and well-being. With all of our planning, we didn’t anticipate being so successful—but you can!

The conditions, assessments, and stakes are different for every refinery town, along with the experiences of residents and the history of that community. In sharing this playbook, we hope to pass on a few of the insights and tools we gained in running our campaign. Do your scenario planning, plan for your threat and your power, plan for what comes next, and **be prepared to WIN!**

References

Richmond Polluters Pay: <https://richmondpolluterspay.com/>

CalEnviroScreen: <https://experience.arcgis.com/experience/6b863505f94>

Who We Are

Polluters Pay Coalition:

Asian Pacific Environmental Network Action

organizes Asian immigrant and refugee communities across California to fight for clean air and a better future. Since 1993, our sister organization, the Asian Pacific Environmental Network (APEN) has built a membership base of Laotian refugees in Richmond and Chinese immigrants in Oakland. Together, we've fought and won campaigns to make our communities healthier, just places where people can thrive.

Communities for a Better Environment (CBE)

Action builds people power in California's communities of color and low-income communities to achieve environmental health and justice by preventing and reducing pollution and building green, healthy, and sustainable communities. CBE Action is one of the preeminent environmental justice organizations in the nation with member-bases in Richmond, East Oakland, Southeast Los Angeles, and Wilmington, California.

SEIU Local 1021 represents over 70,000 employees in local governments, non-profit agencies, health care programs, and schools throughout Northern California.

With support from:

Richmond Progressive Alliance (RPA):

The RPA prioritizes the needs of communities historically and currently disadvantaged by the system. Join our fight to put power back into the hands of Richmond residents by becoming a member.

With Appreciation to Campaign Partners and Endorsing Organizations:

1000 Grandmothers for Future Generations
350 Contra Costa Action
ACCE Action
Arab Resource and Organizing Center (AROC) Action
Bay Area Divest! (BAD!)
California Nurses Association
Center for Biological Diversity
Citizens' Climate Lobby, Alameda County
Climate Health Now

Climate Justice Alliance
Committee of Interns and Residents (SEIU/CIR)
Contra Costa Young Democrats
Cooperation Richmond
Fossil Free Media
Healthy Martinez: Refinery Accountability Group
Idle No More SF Bay
Labor Rise Climate Action Committee
Lead Locally
Oil and Gas Action Network
Point Molate Alliance
Reimagine Richmond
Richmond Firefighters L188
Richmond Our Power Coalition
Richmond Progressive Alliance (RPA)
Richmond Shoreline Alliance
Safe Return Project
San Francisco Bay Physicians for Social Responsibility
San Francisco Baykeeper
SEIU 1021
Stop OAK Expansion Coalition
Sunflower Alliance
The Watershed Project
United Teachers of Richmond, CTA/NEA
Urban Tilth
Youth Vs Apocalypse

Acknowledgements

Thank you to every Richmond resident, organization, and organizer who volunteered, canvassed, shared your stories, and stayed late at City Council meetings to support the Polluters Pay campaign. This is your victory. Thank you to Jim Ross and Alex Banash of *Telegraph Media* — we are so grateful to your expertise and support for Polluters Pay. Thanks to David Sharples and Edith Pastrano of ACCE Action, Dr. Amanda Millstein of Climate Health Now, Rafa Castro-Chavez of Urban Tilth, Sandrine D. and Francisco Ortiz of the United Teachers of Richmond. And lastly, a big appreciation to staff and volunteers with CBE Action, APEN Action, SEIU 1021, and the RPA who contributed to this campaign.



Contact Us

with your ideas and questions—we'd love to hear from you at
richmondpolluterspay@gmail.com