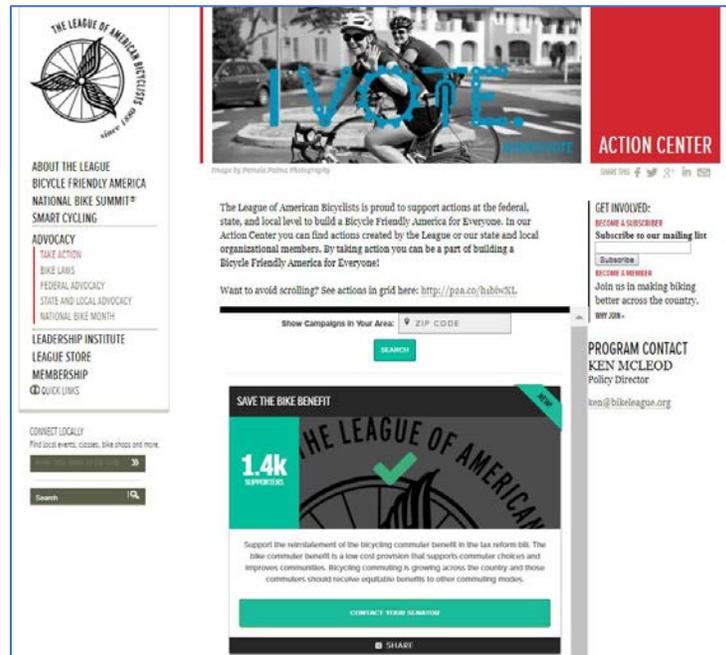


# How to Use the League of American Bicyclists' Action Center for Advocacy

Do you have a state, regional, or local issue that you'd like to take action on?

If you or your organization is a League of American Bicyclists' member, then you can use our Phone2Action advocacy software to reach our members and others to take action!



By using the Phone2Action system your advocacy effort will be featured on our action center, available as a shareable standalone site, and all contact information gathered will be available to grow your organization.

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## Getting Started

To take action through our Phone2Action system, we will need the following information:

What type of Action would you like people to take?

What do you want to do?

-  Connect my advocates with their elected officials >
-  Create a signup list >
-  Create a petition to gather signatures on an issue >
-  Create a "find my legislators" page >

Each of the Action options, other than the "find my legislators" page, will then ask you to select a template for the standalone site associated with the Action.

Choose a Template

Select a layout for your campaign from one of the templates below. Mouse over any thumbnail to preview or activate it. You can change colors later, on the Design page.



**THE ORIGINAL**  
The original Phone2Action campaign layout.



**MÍNIMO**  
Ample white-space narrows your advocate's focus to the actions, rather than the content.

Cancel

The rest of this Guide will focus on the "Connect my advocates with their elected officials" (Connect to Officials) Action.

The Connect to Officials action is the most complicated action possible and the most common action. It can be used for any targets, including agency contacts, private individuals, and any other contact that has an email address, facebook account, or twitter account.

## Creating a Public Message

The first step in a Connect to Officials action is creating the message that will display for the public on the action's site. There are four required components of this message:

### 1. Call to Action Headline

- a. This Headline will appear at the top of the page and should give a quick, easily shared, summary of the action

### 2. Message body

- a. This message is where you can explain the issue and make your case for people to take action. The message should be short to limit the need for scrolling, but can contain images and a video if you wish. The message should end with a call to action clearly identifying the next step you would like a person to take to support your cause.

### 3. Call to Action

- a. This text will appear over the area where a person enters their contact information to take action. The Call to Action should be very short, the default text is "Enter Your Information to Take Action Now!"

### 4. Thank You Message

- a. This text will be displayed when a person has entered information and taken action. It should be short and provide additional information about your organization so that an advocate can become more involved with your organization.

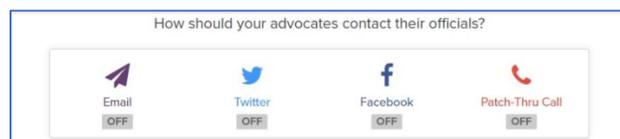
There are two optional features that you may want to use when creating your message:

1. **Campaign Focus** – this feature allows your campaign to be limited to a geographic area so that people outside your jurisdiction are not allowed to participate. Officials are more likely to listen to their constituents than to people outside their area. By adding a campaign focus you can ensure that only constituents take action.
2. **Smart Targeting** – this feature allows you to send different messages to different targets. It is most commonly used when targets have known stances on an issue and you would like to send supportive messages to targets that support you and persuasive messages to targets you do not support you.

## Creating a Target Message

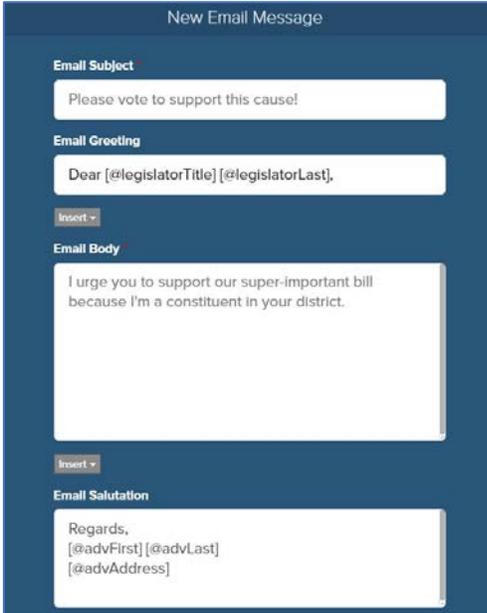
The second step in a Connect to Officials action is deciding the message types that your targets should receive. Phone2Action provides four ways to contact targets:

1. Email
2. Twitter
3. Facebook
4. Phone Calls



## Email

You can create multiple email messages for your campaign so that officials receive multiple messages about your issue. For any message to be sent to an official the following information is required:



The screenshot shows a 'New Email Message' form with the following fields and content:

- Email Subject:** Please vote to support this cause!
- Email Greeting:** Dear [@legislatorTitle] [@legislatorLast],
- Email Body:** I urge you to support our super-important bill because I'm a constituent in your district.
- Email Salutation:** Regards, [@advFirst] [@advLast] [@advAddress]

**Email Subject** – The Subject line you would like to appear in the official’s inbox.

**Email Greeting** – The greeting you would like to appear at the top of your email. Phone2Action has names and titles for federal and state elected officials, so you do not need to provide that information. In those cases, the only information needed is the introductory word, e.g. “Dear” or “Hi.”

**Email Body** – The message you would like sent to the official. This is where you make your case to the official so that they are aware of your issue and the action that you would like them to take. A good length is 3-5 paragraphs that clearly introduce the issue, any information about your group that you want to provide, and the action(s) you would like the official to take, including any timing that they should be aware of.

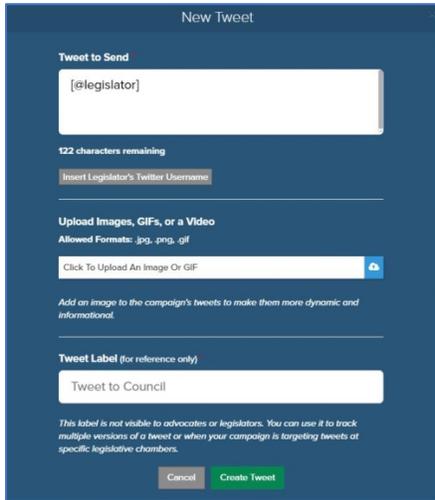
**Email Salutation** - The salutation you would like to appear at the top of your email. Phone2Action has names and titles for federal and state elected officials, so you do not need to provide that information. In those cases, the only information needed is the salutation word, e.g. “Best Regards” or “Sincerely.”

There are several options that you should be aware of when setting up messages:

1. Delivery Mode – Messages can be delivered immediately or deferred to be delivered all at once.
2. Options for Changed Messages – By default, people taking action can alter messages. You can specify that people are not allowed to alter messages or you can hold altered messages for review.
  - a. If you elect to hold altered messages for review, you are responsible for reviewing them. We will provide altered messages to you upon request, but will not review them for you.

## Twitter

You can create multiple twitter messages for your campaign so that officials receive multiple messages about your issue. For any message to be sent to an official the following information is required:



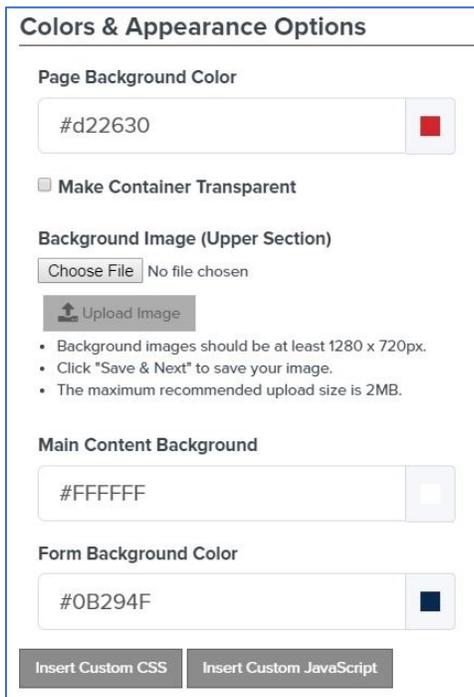
**Tweet body** – The tweet must be 140 characters or less including the officials twitter handle. If your campaign is targeted at multiple officials, please be aware of the longest twitter handle in that target list.

Phone2Action has twitter contacts for all state and federal elected officials.

**Tweet Image** – Your tweet can contain an image, GIF, or video.

## Design Your Action

Phone2Action makes creating a shareable page for your action easy. All formatting is handled by Phone2Action. However, you can control how the format uses colors and images in order to make an attractive and engaging action page.



**Page Background Color** - This option allows you to pick a background color for your action page. The default is a red background, based upon the League of American Bicyclists' branding.

By default text appears on a white background container. This container can be made transparent so that an image underneath can be seen.

**Background Image** – The background image must be at least 1280 x 720. Most of a background image will be covered or obscured by text. A good image should have its focus on the perimeter of the image.

**Main Content Background** – This is the background for the text container.

**Form Background** – This is the background for the Action container on the right hand side of

your text.

**Share Image and Alt Text** *(optional)*

When this campaign is shared (advocate and/or organization) on social media the image will be included in the post

Choose File | No file chosen

Alt Image Text

Upload Image

- Click "Save & Next" to save your image.
- The maximum recommended upload size is 2MB.

**Share Image** – This option is great to use if you want your action to be shared on social media. The image must be at least 800x500.

A good image identifies your organization or the issue you are advocating for.

**Alt Text** – You can provide a short text caption for the share image.

**Field Display Options**

**Caution**

Hiding fields on an email-the-official campaign can affect message deliverability for the U.S. Senate and some state-level officials. Many of these officials use web forms instead of email addresses, which often require every field listed below.

**SETTINGS LEGEND**

Required **R**    Optional **O**    Hidden **H**

**FIELD SETTINGS**

You can change a field's setting from required to optional to hidden by clicking on the field until it is the appropriate color.

Email

Email

Title

Name

Phone

Address

ZIP Code

Custom Fields

Advanced Options

**Field Display Options** – This menu allows you to control the information that is required before a person can take an action.

For an email contact action, the required information is generally set by the contact forms of the officials contacted. For this reason, the default fields include email, phone, address, and zip code.

For social media contact actions, less information can be required.

## Targeting Your Action

Phone2Action comes pre-populated with contact information for all Federal elected officials, state elected officials, and the elected officials for the 100 largest US cities.

In addition to these pre-populated contacts, Phone2Action can create custom targets for any individual, private or public, and for many administrative actions. If there is an email address or social media id, then Phone2Action can be used to target messages to that id.

### Advocate's Own

*Target elected officials based on the advocate's location.*

**Federal**

**Federal**

Senators

House Representatives

**State**

**State**

Governor

Senators

Representatives/Assembly Members

**Municipal**

*Municipal targeting is available in the [top 100 largest US cities](#).*

**Municipal**

Mayor

City Council At-Large

City Council Member

By using the pre-populated contact information, your actions will target all elected officials for the relevant group.

Phone2Action will route messages to targets based upon the information given by advocates so that targets only receive messages from constituents.

### Special Delivery

*Target committees, leadership, or private citizens (CEOs, etc.).*

Group Name	Officials
<i>No special delivery groups enabled</i>	

[+ Add Special Delivery Group](#)

**Special Delivery Groups** – By creating custom target groups you can further refine who is contacted about an action. This is especially helpful for targeting committees before a bill is introduced to the entire legislature. This is also how you would target an individual or administrative action.

Special Delivery Group

Group Name: House Republicans

States: Select states to a

Legislative Districts: Select legislative

Exclude?:

Email: Select Messages

Name	Title
+ Add Group Member	

Cancel Save

### To Create a Special Delivery Group:

**Group Name** – Internal name for the person or group.

**State** – This limits the constituents who are allowed to send a message to the target so that they only come from the target’s state.

**Legislative District** - This limits the constituents who are allowed to send a message to the target so that they only come from the target’s legislative district.

**Exclude?** – This allows you to customize targets by excluding an official or officials rather than specifying the official(s) that receive a message.

**Email** – This specifies the message(s) created for the action that a target will receive.

**Group Members** – You can have multiple members in a Special Delivery Group. However, constituent targeting is specific to each group and cannot vary for multiple members. If you need to restrict constituent targeting for multiple custom contacts then each needs to be its own Special Delivery Group.

## Add Members

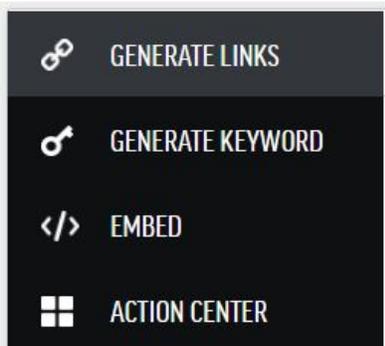
Group members can be pre-populated legislators or custom contacts.

For custom contacts, Phone2Action requires a name and title. You can provide the following additional information as is appropriate for an action:

- Email address
- Twitter username
- Facebook ID
- Phone Number

## Sharing your Action

When you are finished building your campaign there are four ways in which the campaign can be shared.



**Embed** – This option allows you to embed a Phone2Action module in your website. You can customize the colors used in the embedded module if you wish, but they default to the same colors as the shareable action page.

**Generate Links** – This option allows you to generate a link to your custom action page. There are three url stems that are available through Phone2Action:

- P2a.co/
- Actnow.io/
- Mobilize4change.org/

Each stem can be used to generate a link that can be shared. The link will be a random alphanumeric ending to the stem. Additional customization is not possible without additional fees or outside redirects.

**Generate Keyword** – This option allows you to generate a keyword that can be included in a text so that people can take action by text.

**Action Center** – This option allows your action to be included in the League’s Action Center or other Action Centers operated by the League. The League’s Action Center can be found at <http://bikeleague.org/TakeAction>.

## Help Us Take Action in Your State

The League of American Bicyclists is actively looking to support the state, regional, and local actions of our members in addition to League-generated federal actions. We hope that this Guide provides you all of the background information that you need in order to help us create a great action on your behalf.

Here are links to sample campaigns so that you can get a sense of what the final action will look like:

- <http://p2a.co/RoNWsJg>
- <http://p2a.co/cnr9175>

If you have any questions about using the League's Phone2Action system please contact Ken McLeod, at [ken@bikeleague.org](mailto:ken@bikeleague.org).