

*Prelude from Aidan:*

*This is a document I wrote when PAF was in the midst of deciding which campaigns to launch in 2025. We had narrowed it down to three possible ballot initiatives:*

- *Force-fed foie gras ban in Denver, CO*
- *Force-fed foie gras ban in Washington, DC*
- *Pasture requirement in Clackamas County, OR*

*We had polling for each campaign showing that DC had the highest support (61%) and Clackamas was the most narrow (53%). We also had to choose whether to concentrate our resources or spread them across more campaigns.*

## **Leveling Up**

The most important consideration in deciding our 2026 campaigns is: **what will result in the most powerful version of Pro-Animal Future?** Our goal should not be wins for wins' sake. And grimly, for 2026, it is not primarily wins for animals' sake. The wins on the table won't do enough for animals to justify the time and money we are asking people to invest in us.

The primary goal is to most directly build the version of PAF that is powerful enough to achieve wins that actually matter for animals. Wins that matter more than anything else our activists and donors can achieve if they focus elsewhere instead. If our goal for 2026 is to win, it is because we believe winning is what we need to level up. I do believe this, but it's an important distinction to keep in mind as we get into the details.

Reading everyone's thoughts from the team and consulting outside advisors, my thinking on what will most cause us to level up has evolved.

### **Version 1: where I started before some advisor conversations**

The key to leveling up is to force ourselves to stretch as hard as we can. To choose exactly the most ambitious plan we can accomplish if we give our absolute best performance: the plan that will force us to innovate the most effective & efficient version of PAF's model. Having already scaled down from my earlier hope of 10 campaigns in 2026, I thought that surely all three of the campaigns we identified would be within our capacity. I envisioned all the full-timers gaining a new confidence and authority in our respective roles by recreating the desperate life-or-death struggle that brought us to where we are now from who we were 1-2 years ago. I've also been thinking about grassroots fundraising in the last couple weeks, and having campaigns in three different cities would give us a wider base of activists and donors to draw on.

Yes, the risk of spreading our resources too thin was real, and it gave me pause. (See budget analysis in the final section.) I knew that if we lost all three campaigns, it could mean the end of PAF, or at the least downsizing and focusing on lobbying campaigns for a while. But I was also worried about the risk of becoming a bloated, complacent organization with too many staff and

not enough ambition if we grew our paid team and budget as much as I expected to while running only two campaigns, neither of which pitted us directly against the larger meat industry. (Prior to receiving Denver and DC poll results, I assumed Clackamas would be the first campaign to cut.)

### **Version 2: Where I ended up after my call with Dave Coman-Hidy**

My first shift here came from a call with Dave Coman-Hidy. Whatever you think of The Humane League's work, Dave built the organization from an all-volunteer group in one city to a worldwide behemoth of hundreds of staff, an 8-figure budget, and countless high-profile wins for animals. He has also been a champion for PAF, a strong believer in our work who is invested in our success. Though we talk infrequently, there are few advisors whose words carry as much weight for me.

I shared the above thinking with Dave and asked for his response. He argued that purely from a standpoint of strengthening PAF, winning is almost all that matters. Having wins in our hands will attract more activists, more funders, and better talent to future full-time roles enabled by the additional money. I pushed, asking if there was ever a time in THL where they were under a ton of pressure and it made them perform better. He responded that it was more the opposite: they performed their best and upskilled more when they slashed programs and focused on fewer, more impactful campaigns, with some room to breathe and do things well instead of having to rush everything out the door. And, he added, we aren't even at that stage yet. We shouldn't really be trying to scale a model until we have a proven winning model in hand. Yes, two wins would be better than one, but one win only would be better than one win and one loss, or one win and two losses. No wins, he agreed, would be existential.

Coming away from my conversation with Dave, I felt much less determined to push us as hard as I could. I was still flirting with running all three campaigns— after all, while three campaigns means spreading resources thin, it also means more chances for a win. (Yes, this doesn't really hold up when DC seems like a secure win while the others seem much riskier.)

Actually, I started zeroing in on an option Eva and I had thought of just before speaking to Dave: we could launch all three campaigns and get them on the ballot while vigorously fundraising. Then next summer, we could run another round of polls, look at how our fundraising was going, and decide if we had the resources to fight all three at once. If not, we could decide then on which campaign to throw to the wolves. We could let it fail without any budget and take what earned media we could get as a consolation prize. Better yet, we could offer to withdraw the measure, using it as negotiating leverage to get the city/county council in that area to pass a compromise bill. This may be disappointing to activists, but it would give us a year's worth of additional information about our position in each county.

### **Version 3: After speaking with Ben Newman (Animal Rising)**

The next shift came from talking to Ben, the leader of Animal Rising. Spoiler: it was a shift further in the same direction. Ben is an outstanding grassroots leader, one of the most successful in the movement. He understands (and often spontaneously lectures about) the importance of a bold vision for galvanizing grassroots activism— that believing something is possible, and convincing a bunch of other people that it's possible, is often the thing that makes it possible.

Ben shared several thoughts in favor of concentrating more of our energy on one campaign:

- DC is far more symbolically potent than Denver or Portland (not to mention Clackamas.) He hadn't really heard of Denver or Portland, but thinks activists from the UK (not to mention all over the US) would flock to DC to help with the campaign. With the AVA summit taking place there in 2026, we could make this a major focus of the movement—he thinks we'd need to book out entire hostels to house all the activists who'd want to be part of a convergence here.
- At our current stage, upskilling our next generation of leaders will actually be easier concentrated in one place than spread across several cities. Putting more of our energy into DC will create the kind of grassroots milieu that exists in London, with activists constantly sharing ideas, learning from each other, and inspiring each other to step up their game. This frenzy of concentrated energy will birth a cadre of leaders who can spread across the country bearing a message: We won, and now you're going to win.
- We've had our test run. We used up our one chance to say "we failed but we learned a lot." Nobody holds that against us, but we don't get to say it a second time. (I do wonder if we could get away with saying these three campaigns are an A/B/C test but that's probably stretching it.)

Only after talking to Ben was I willing to seriously entertain the possibility of running just one ballot measure in 2026. Now I can see how one riveting campaign in the nation's capital that wins decisively could give us the leaders, funding, and momentum we need to rocket straight toward statewide campaigns. I'm not (yet) saying it's definitely the best option— two wins would still be better than one, and it sure would be nice to test out our factory farm measure at the county level. It would be nice to run an ambitious, highly partisan measure in *some* purple county in 2026 to take advantage of the likely blue wave. But more clearly rooted in priorities, I'm ready to re-evaluate the decisions, as parts and as a whole.

## Interlude: Naivety vs. Ignorance

There are two ways to evaluate our chances of winning in each city. As I've been trying to reason through each possible 2026 campaign, I've been running up against my ambivalence between these two ways of thinking. One focuses on trying to collect and weigh as much information as possible, aggregating all this information together to yield a data-rich predictive model. The other believes in naively trusting our poll results. I finally decided to sit these two parts of me down for a good talk. For my benefit and your own, here's the transcribed dialogue between the first, named **Yielded Aggregate (YA)**, and his friend **Naïve Observer (NO)**.

**Yielded Aggregate:** This is the most important decision PAF will make in the next two years. We've got to give it the utmost rigor by collecting and weighing as much information as possible. Look here: what I've done is gathered up every data point, factoid, and observation we think might help us predict the likelihood of different outcomes in each campaign, depending on whether we run one, two, or three campaigns. I've put each datum as a row in this spreadsheet, and assigned each one a weight between 100 and -100. The weight represents how much that factor will influence the outcome of the campaign, with negative numbers pulling us towards a loss. In the final step, I convert the weights to ratios so they can be averaged together, and voilà, I've got an informed prediction about the probability of success in each city. If you want to experiment with different variables or scenarios, you just add the new hypothetical factors, assign them a weight, and see how it affects our chance of winning.

**Naïve Observer:** I see a problem.

**YA:** Let me guess. You object to the subjectivity of the assigned weights. It's true that in most cases these weights came from our educated best guess about how important each datum is based on our experience so far (though a few of them were produced by genuine math from observational data.) But it's better than nothing, right?

**NO:** Actually, that's not my main issue. I'm inclined to agree that our brains are sometimes pretty good at weighting factors intuitively, once we've had some experience to draw on and our brains start to grok the patterns. No, the problem I see is the unknowns. Your sheet currently has a lot of factors with low weight and a few factors with high weight that are doing most of the work. I'm sure we both agree, however, that there are some important data that we just don't have, including both known unknowns and unknown unknowns. Off the top of my head, here's a few known unknowns— that is, I think these could be important factors but I don't have any confidence in assigning a subjective weight:

- *How hard will the restaurants campaign against foie gras in Denver?* It's only one menu item and won't much impact their bottom line. But Denver has a disproportionately high number of restaurants and their financial trouble has been a major local news story lately, so they might seem sympathetic.
- *Will Denver voters get over their animal-rights-ballot-measure fatigue by November 2026?* 4x as much time will have passed from 308 and 309 when voters go to the polls on foie gras.
- *Will a nationwide blue wave boost our numbers in the uber-partisan pasture race in Clackamas?* 81% of Democrats in the poll want to vote yes, so national wave dynamics totally beyond our control could play a big part.

And these are just known unknowns. It sure would be fortuitous if the things that were going to play a big role in determining the outcome were also the things we knew about. It brings to mind the old EA parable about someone who drops their keys at night, realizes a while later, then, retracing their steps to look for the keys, only looks in the part

of the street lit by the streetlight because they don't have a flashlight. Maybe the keys are in the place you could see them, but then again, maybe they aren't.

**YA:** Hang on. I certainly agree there were lots of unknown unknowns when we were embarking on our pilot campaign two years ago. Uncovering those unknowns was a primary goal of the campaign, and in that regard it was wonderfully successful! We know so much more about ballot initiatives now, remember? We wrote it all up in that [blog post](#).

**NO:** I'm not so sure. I mean, I definitely agree we learned a lot. The blog outlines a new theory of how ballot initiative campaigns work. It's a much richer theory than the one we had two years ago. I think it's an accurate story that is usefully action-informing. I doubt it's the only such story, or at least that it's fully complete yet. But even if we think there aren't any more devastating unknown unknowns lurking in the wings, do you agree that the known unknowns alone could suffice to foul up your spreadsheet simulation? That if it turns out these unknowns lean positive or negative in the aggregate, they could outweigh most of your known data?

**YA:** Yes, these known unknowns are definitely troubling. I've played around with different combinations of possible weights for those factors, but the number of different possibilities quickly gets overwhelming. I'm not happy about it. But I don't see an alternative.

**NO:** I've got one.

**YA:** I'm listening.

**NO:** Throw it all out and blindly trust the polling.

**YA:** You can't be serious.

**NO:** Sure I can. From now on, why not let the polling do the hard work for us? We could pull every factor into a spreadsheet and guess how much each will influence the outcome, all while attempting to control for known and unknown unknowns. Or we can recognize that the polling *already does that*, including the unknown unknowns. It runs the computation, distributed across 500 voters' brains, and spits out a remarkably accurate answer.

Consider: in July 2023, Embold conducted a poll on our Denver fur and slaughterhouse bans. This was nearly 18 months before the election, and before any campaigning by either side had commenced in earnest. Looking at post-messaging support and treating all undecideds as eventual nos, this poll was accurate to the final result *within a single percentage point*:

- Fur poll after messaging: **43%**
- Slaughterhouse poll after messaging: **35%**
- Fur final result: **42%**
- Slaughterhouse final result: **36%**

I think we haven't properly updated on this. We weren't thinking about this poll the night of the election, because we'd initially written the results off. Remember: we commissioned that poll from Embold at the same time as several much cheaper versions of the same poll using paid online panels, and the latter all found close to 60% support for the slaughterhouse ban. We concluded at the time that polling was all bogus. It took a few days to remember the Embold poll, and when we first looked, we somehow didn't notice how close it actually was. We went around for the first few months saying the results had been accurate within three points. I don't know what we'd misread initially. This wasn't front of mind when we debriefed as a team or wrote the subsequent blog. We only realized Embold had been accurate within 1pp this week. This was an embarrassing oversight but it's time to correct it now.

**YA:** Hang on, I think you're exhibiting survivorship bias. If there had been only one possible way to interpret the poll, then nailing the result within 1pp would be highly unlikely to be a fluke. But there were several possible interpretations, making it much more likely one of them would happen to be correct. For instance, there's one support number before messaging and one after, and then there's the undecideds. You could count all the undecideds as Nos; as Yesses; you could split them 50/50; you could ignore them and refactor the ratio between Nos and Yeses. You'd have needed to narrow down to one interpretation before seeing the results for this to be robust. And that's just counting our poll. DxE's first poll with the actual ballot title for measure J registered 45% yes votes, and the final result was 15%.

**NO:** DxE worked with a different pollster, but obviously that's not enough to explain a 30 point swing. I agree an explanation is needed there— let's come back to that in a moment. Josh Balk, who has run half a dozen statewide ballot measure campaigns, told us exactly how to interpret our poll with Embold. He said the number after messaging is the one to watch, and explained the Maybe-Naught rule (no matter how hard we campaign, the percentage of *maybe's* we'll win over is precisely naught.) We chose to put his conventional wisdom to the test, envisioning a massive grassroots campaign transforming public opinion in time for the vote. (After all, if we won over all the undecideds, we could win, and we weren't ready to accept the claim that the undecided votes aren't really in play, that the maybes are all for naught.)

We failed to deliver that massive campaign. Yet despite our novice campaign and our opposition's more savvy (and *much* better funded) campaign, our opponents failed to erode our initial support. At all. We lost, but if we had trusted the experts (the professional pollsters and our most experienced advisor) we would have known all along that we were going to lose, and by *exactly* how much. From that standpoint, there would be no need to update the finer points of our strategic thinking based on the specifics of how things played out during the campaign. We just recognize that we should trust the polling from now on.

**YA:** I can see where this is going. Do you really think that everything that happened in the campaign had no effect on the final outcome? That every penny spent by both sides

was wasted? Many respondents to the post-election study described being influenced by campaign materials from one side or the other.

**NO:** I'm flirting with that position, but I don't need to stake it out for what I've claimed so far. Rather, I'm saying that to the extent any drama during the campaign had an effect on the final vote share, the poll was able to model and account for that. Think about the structure of the poll for a second:

1. First, people learn of the policy, and are asked to form an opinion *prima facie*. Most of them do, though a few hold out for more information.
2. Then people see all the arguments for and against the measure. They evaluate how convincing each argument is.
3. Based on the messages, they make a final decision. A small number of people who staked out an opinion initially change it after messaging, but most of the movement comes from people who were initially undecided and were moved by one message or another.

The above description applies equally to what happens in the poll *and* what happens in the actual campaign. The poll simulates the campaign. The fact that it was so astonishingly accurate 18 months in advance illustrates the fact that most people form a quick judgment upon hearing of the measure, and it's devilishly hard to change people's opinions. The reality is, in the five or so minutes it takes to fill out the poll, those respondents have thought about the measure more than most voters will when they actually vote.

Perhaps the post-election study accurately documented the process by which the voters who would have initially marked "undecided" in the poll reached their "no." Perhaps it just describes how voters rationalized sticking to the initial gut decision they'd have gone with regardless. What matters is that the simple Maybe-Naught rule predicted all of it before it happened. The simplicity of this explanation makes it far more useful to us than more complex phenomena that may be happening on a lower level of abstraction.

**YA:** Look, I obviously agree that polling is an important factor to consider. See here, I've included the polls for each campaign in my spreadsheet, and given them quite a high weight, higher than almost any other factor. But to say it's the only factor, and that we should ignore all this other information, is surely a mistake. Incorporating more information at the appropriate weight gives us a more informed decision, by definition.

**NO:** I think I see the crux here. You see a lot of data points about the campaign that are important to different *degrees*, but are the same *kind*. You're flattening all these inputs into one dimension and assigning them weights on that dimension. I think this is a mistake. Polling is different from these other points not just in degree, but in kind. To me, the polling is not a data point like any others, but a simulation that accounts for a vast set of data points, much as your spreadsheet is trying to do. Yes, that's it— the polling isn't the same kind of thing as the rows in your spreadsheet, it's the same kind of thing as your spreadsheet. It's a system that computes lots of inputs and gives as an output a

prediction about the campaign— just like your spreadsheet does. But the poll is a much more powerful tool. It is able to account for data we don't know, data spread across the minds of hundreds of random voters. I've offered a theoretical argument for why polling is a better simulator than your spreadsheet, but the results speak for themselves. It is, historically, a much more empirically accurate one. Do you really think your spreadsheet can predict the outcome within one percentage point? My polls have done it before, and I'm willing to bet big that they will do it again.

**YA:** You noted before that DxE's poll represents a major hole in this story. Actually, what we have is a sample of just three polls, two of which were highly accurate, the third being wildly inaccurate. How much credence do you really think we should place on polls to hold down to 1pp over an entire campaign, given such a small and heterogeneous sample?

**NO:** The probability of an imprecise measuring tool landing within 1pp of the mark twice in a row is quite low, so this is strong evidence the tool is precise. The probability of that precise tool then missing the mark by 30pp is staggeringly low. This certainly needs an explanation. Here's mine.

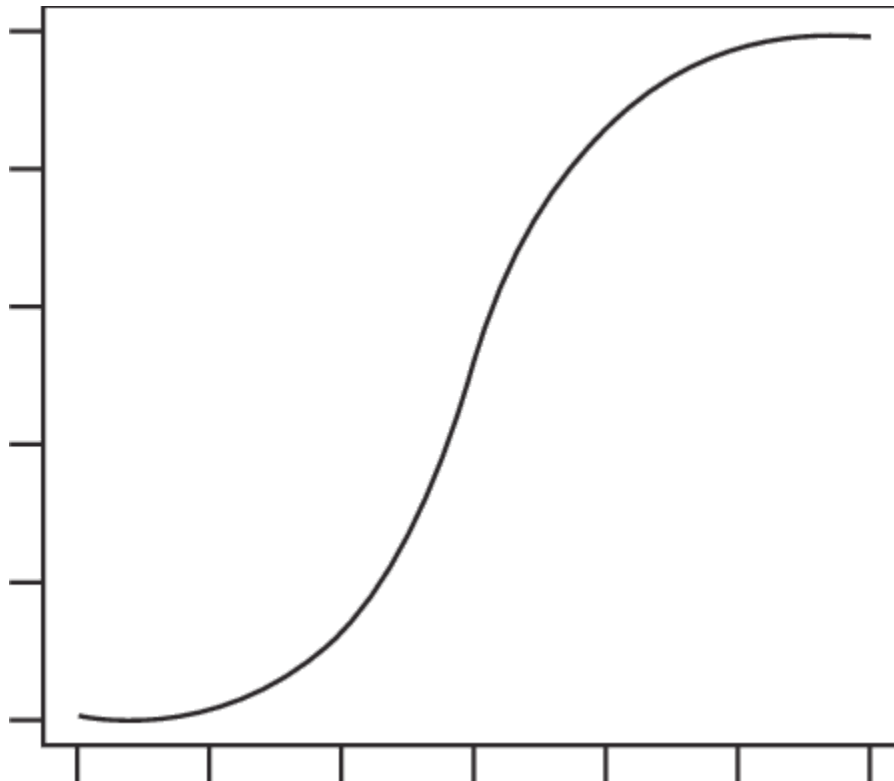
The opposition to the Denver measures spent over \$2 million. The Democratic party, Denver Post, Mayor, and several city council members all came out against us, along with unions and progressive groups like the Working Families Party. As bad as this felt to us, I wager that most voters in Denver didn't know about any of these endorsements. 308 and 309 were the top local political issues, but that's just not saying very much. Average voters were so much more concerned about the presidential race that these issues barely registered in their awareness.

The opposition in Sonoma spent the same amount, but this goes much further. Sonoma is sleepy compared to Denver, and half the size. It has a much stronger local identity with deeper relationship networks. Opposition to measure J was dramatically more salient in Sonoma than opposition to 309 in Denver. The Dems, newspapers, and elected officials didn't just endorse against it, they crusaded against it almost full-time for six months. Ag is far more powerful in Sonoma, a much greater part of the county's identity, and it all showed.

This all calls to mind something our advisor Carey shared. (In the early 2000s, Carey lost a ballot measure to ban greyhound racing in MA, then came back and won round 2 a few years later, following up with another win in FL. Where Josh sees polling numbers below 60% and tells us to abort, Carey has run campaigns that have delivered final vote totals above initial poll results. He's broken the Maybe-Naught barrier and believes we can too.) Whenever Carey talks about the importance of television ads, he mentions that there's always a certain threshold you need to meet for the ads to be effective. When he starts running ads, he also sits watching the poll numbers. For the first few days or \$100,000s, nothing happens. Then, finally, the Maybe-Naught barrier shatters and he sees polling start to visibly climb before settling back in once he's reached everyone he can persuade through TV ads.



The spread of norms through social networks is nonlinear. It involves tipping points and information cascades. Indeed, just based on theory, we should expect the ROI on campaign activities to follow a logistical curve, where the X axis is input (paid media, earned media, and well-spent volunteer time) and the Y axis is votes gained.



Below a certain threshold, your campaign isn't really able to break through the noise. Even a tenfold increase in spending might barely get you more votes. (I don't know whether the X-axis is linear or logarithmic, we'd need more data.) Then, above that threshold, you start earning rapid returns as information cascades through the network. This snowball effect takes on a life of its own such that relatively soon after crossing this threshold, you start getting rapidly diminishing returns on input again as you exhaust the pool of voters who can be moved at all.

It turns out that in Denver, the campaign against us, with \$2m and halfhearted opposition from the press and political insiders, fell short of this threshold, while the opposition in Sonoma broke through it. This is what it takes to falsify initial polling. You asked earlier if I think the money spent by the opposition was a waste. At this point, I'm inclined to say that a large amount of it was, since they fell short of critical mass. There may have been a much lower amount they could have spent to at least ensure that voters had about as much access to the opposition arguments as did the people filling out the poll 18 months earlier. If so, the delta between that number and \$2 Million was acausal. Of course, the same principle goes for us. I suppose there are two sub-versions of my theory here:

- a) The outcome would have been the same if either or both sides did practically no campaigning.

- b) The poll accurately predicted/modeled the impact that both campaigns would actually have, including insofar as they just canceled each other out.

I admit I feel confused about which of these two is simpler, and would need more data and experimentation to start preferring one over the other.

Last note: the critical threshold in a given jurisdiction would be a complex function of the size of the population, the average level of political engagement, and certain properties of the social network like insularity and density. The fact that our opposition in Denver couldn't reach it is a good sign that they won't be able to when we scale up to statewide campaigns either— it should take at least 10x as much input (I'm naively assuming this latter point and haven't actually thought it through.) It's also a bad sign for our ability to reach it ever, unless we are able to achieve the kind of mass grassroots mobilization we were dreaming of two years ago.

Note on this note: probably, the effectiveness of our campaign also raises the critical threshold for our opponents. Under this model, we wouldn't expect to be able to win over any undecided voters at the current scale of resources we're able to mobilize. But we'd still want to run the best campaign we can in order to decrease the chance that our opponents reach the critical threshold.

**YA:** This explanation seems plausible. It's a convenient explanation after the fact. But before putting significant credence on it, we'd need to see it predict an outcome in advance more accurately than my method.

**NO:** I agree, except for the part about assuming your method should have higher starting credence. Unfortunately, there's no inexpensive way to test either. I'm not saying—*yet*—that we should run out and start 10 initiatives that all have winnable polling without putting any money or effort into campaigning for them. I would want to test that in one campaign first. But while we should plan to work hard and run the best campaigns we can run in 2026, I think that naively trusting the polling is a better predictor of outcomes than your more complicated system.

I suppose I'd better start making predictions now if I'm going to validate (or invalidate) my approach, so here's one: if the campaigns against 308 and 309 weren't enough to reach a tipping point in Denver and take away literally any of our support from the initial poll, the campaign against foie gras won't either. It's one menu item, nobody's going to spend \$2M defending it and nobody will believe that it will put restaurants out of business. Same thing in DC. Clackamas, I'm not so sure about. In a number of obvious ways, it's more like Sonoma than Denver (similar size, mixed urban/rural, etc.). The policy is more similar to Sonoma. If there's any campaign on the table for 2026 where the opposition will be able to reach a tipping point, it's Clackamas. I still wouldn't *expect* it to happen, because there are many fewer farms in Clackamas and ag is, as far as we can tell, not nearly as big a part of the identity. Clackamas also has wider uncertainty because we modified the measure after polling in ways that we expect to marginally increase support.

In light of all that, here are my specific predictions (credence between 0 and 1 where 0 means certainly false and 1 means certainly true):

- DC foie: 60-62% at .85 credence
- Denver foie: 54-56% at .85 credence
- Clack pasture: 51-57% at .65 credence

Blindly trusting the polling would be a riskier bet in Clackamas, and doubly so if we don't spend much money on a campaign. But if it worked out, it would be that much stronger evidence for the naive approach. I'm definitely tempted to try out just that. You know, for science.

**YA:** I take your point that my system hasn't actually been better tested than yours. And I appreciate the specific predictions. I will try to generate some from my original system as well. But I'm actually feeling more inspired to combine our two approaches. Here's how: we grant that the poll will fall within 2 or 3 percentage points of the final result *if* neither campaign (support or opposition) is able to reach critical mass. (I think 1pp is too confident for now given just two examples. I don't even think Embold seriously claims their poll is that reliable.) Then, we use my system to evaluate the likelihood that the opposition will rally enough resources to reach critical mass. It will involve fewer variables, and hopefully fewer unknowns, than what I was doing originally. And for now, we focus our campaign strategy on trying to undermine their ability to reach critical mass. For the long term, we try to increase our capacity to the point that we might eventually be able to raise enough money, mobilize enough activists, and build strong enough political relationships to trigger a positive information cascade ourselves.

**NO:** I like it! Let's get to work.

## The Balance of Forces

With my inner conflict at least partly reconciled, I'm ready to get into the weeds of each specific measure. First, here are some broad budget projections informing my thinking.

### Budget projections

Expenses		Revenue	
9 staff	\$585k	<b>Dependable</b>	<b>\$825k</b>
Media: OR	\$350k	Phauna	\$400k
Media: CO	\$125k	CL	\$125k
Media: DC	\$125k	Navigation	\$300k
Lobbyists	\$60k	<b>Stretch</b>	<b>\$205k</b>
Other costs	\$60k	ACE	\$80k
<b>Total for 3</b>	<b>\$1.3M</b>	EAAWF	\$75k
		Aceso	\$50k

		Grassroots	
		Low end	\$150k
		High end	\$300k

The total cost of fully funding all three campaigns is not likely attainable (at least, everything would have to go perfectly our way.) That's if you agree with these costs for funding campaigns. \$350 for Clack came from our advisor Carey. Our Naive Observer thinks it should be less, at least for DC. You might think we should spend more in Denver given the low pre-messaging result (NO would like it to be known that she objects to that reasoning.)

Removing Denver or DC, or reducing all media budgets by 20%, would bring us into an attainable zone. Removing Clackamas makes it look easy overall.

Now I'll share some assertions, with credence between 0 and 1.

**1. We will definitely run a campaign in DC (.95)**

Seems uncontroversial at this point.

**2. If we pare down to two campaigns, Clackamas should be the first to go (.85)**

For:

- 2.1. The polling is the worst.
- 2.2. The opposition will be strongest, probably several times over, making a worse result than polling more likely than anywhere else. The chicken industry in Clackamas has much more to lose than the restaurant industry in both cities combined, and that's before you think about national groups climbing into the ring.
- 2.3. Given 2.1 and 2.2, we ought to budget more for Clackamas than the other campaigns, meaning not running it frees up more money than any other.
- 2.4. Unlike any other city (see 3.1-3), we have a strong alternative to a ballot measure. We have earned allies on the city council who owe us one (or more) and want to deliver it. There's a case to be made that even if we thought we could definitely win in Clackamas, it would be better for the long term to focus this year on developing the voter bloc part of our model in Portland.
- 2.5. It will be much less strain on our comms team to focus on two measures of the same policy than on two wildly different campaigns. Eventually, we want to be capable of the latter, but there's no good reason to overextend ourselves in 2026 when we haven't won yet.
- 2.6. If we kick ass in 2026 and attract more funding, we can run this for 2028 and be more likely to win. Based on the polling and expected opposition, we'd need more money here.

Against:

- 2.7. **NO:** money doesn't matter because campaigns don't matter. At the very least, we should test this hypothesis someday, and now seems as good a time as any.
- 2.8. We could probably get away with losing here— nobody cares about Clackamas, nobody would even notice, and our funders might accept our explanation that this was a different kind of experiment than the Denver campaign, especially if we tell them in advance and have a win elsewhere in hand.
- 2.9. Delaying our trial of the factory farming measure postpones the earliest date we could do a statewide campaign. If things go incredibly well in the next two years, it's possible we'd feel ready for a statewide campaign by 2028, *if* we'd had a chance to test this measure out.
- 2.9.1. Counter from NO: you don't need to test anything, just trust the polling.

### 3. If we don't do a ballot measure in Denver, there's nothing for us here (.75)

For:

- 3.1. Unlike Portland, we seem to have no significant inroads with the City Council. City Council elections don't take place until April 2027, fully two years from now. We are fresh on the heels of a high-profile double animal rights campaign losing in a way that most political insiders agree was a total defeat.
- 3.2. Every AR legislative campaign in recent months has failed, all in places where there was nothing similar to the shadow cast by 308 and 309: Chicago fur ban, Washington fur and foie gras bans, DC fur ban. Am I forgetting anything?
- 3.3. Initial efforts to excite activists around conventional lobbying do not indicate that this strategy on its own will be a pathway to serious mobilization.
- 3.3.1. I don't want us to give up on this but Portland is the place to try it, not Denver, at least not until we can jump into the ring on city council races in 2027. I'm guessing that wins will be the key, and I don't see any wins on the horizon.
- 3.4. If the plan is to let Denver cool off until 2027-28, there's no point in pouring energy into sustaining a small activist presence and winless lobbying operation during that time. Almost none of the activists will last that long. We might as well restart in Denver in 2027 when an exciting campaign will, I expect, enable us to easily jumpstart right back to 2023 levels of mobilization.
- 3.5. I don't think there's much we can do to build relationships in Denver in 2025-26 without a winnable campaign (ballot or legislative). Nobody wants to talk to losers. Momentum creates alignment, alignment does not create momentum.
- 3.5.1. I expect city council people and Dems to sort of string us along but not actually *do* anything for animals in the next two years.
- 3.5.2. I expect that we'd have at least as much relational capital immediately upon winning a ballot measure as we would after two years of polite

relationship building, because we'd have elbowed our way to the table, and that's how power actually works.

- 3.5.3. Same as 3.5.2 but for 2 months of work supporting city council candidates.

Against:

- 3.6. Low credence on 3.5. I would consider trying it for a few more months. I have much higher credence on 3.3, but I'm open to being proven wrong.

#### 4. Running foie gras in Denver is a totally reasonable option (.75)

For:

- 4.1. Polling is good enough, considering adversaries ran an exemplary campaign last year and couldn't budge our polled support by even 2%, and our adversaries this year will almost certainly have considerably less money. *This point is doing most of the work for point 4.*
- 4.2. Betsy and Jessica pointed out that Denver voters seem to be burned on fur, and that the specific shape of this burn is that "it seemed reasonable on its face but then I found out it had all these issues," and we're pretty confident foie doesn't have any lurking bullshit like that so undecideds could come our way.
  - 4.2.1. **NO:** "This only describes people who were undecided in the poll but eventually voted no. But I'll allow it since those are different people than the undecideds on foie gras."
- 4.3. Though not as much as Clackamas, partisan split on foie gras (Ds 64% yes | Rs 26% yes) leans in our favor in a blue wave year.
- 4.4. We're way smarter this year and are going to run a better campaign, so we really should be able to hold onto our support.
  - 4.4.1. **NO:** [glares silently]
- 4.5. There are at least some people who feel bad about their stupid ass votes against us last year and would jump at the chance to redeem themselves.
  - 4.5.1. **NO:** "But—"
    - 4.5.1.1. Yes, yes, this is already accounted for in the polling numbers.

Against:

- 4.6. Losing again in Denver will get us driven out of town.
  - 4.6.1. Counter arguendo: if we're going to leave anyway, we might as well try one more time. Do we really think things will change that much if we wait until 2028, but won't change similarly between now and 2026? That's a long time for the average voter's memory.
  - 4.6.2. *Added later:* it probably gets us driven out of Denver at least temporarily, but we could just run a bunch of campaigns in smaller cities and then bypass Denver and go straight to statewide from there.
  - 4.6.3. *Added 4/11:* 350 Colorado has only lost BMs but they're still a significant force because they've built up other relationships

- 4.7. From a nationwide perspective, a Denver campaign really is not necessary. We can get everything we need out of the DC campaign plus either option in OR. Given that and 4.6, this is high risk, low reward.

## Diagnosis

Based on all this, I am leaning towards the following updated plan. We will of course re-evaluate after each campaign cycle, but I think it's worth having a sense of where we're trying to get beyond the next two years while making the immediate decisions.

- 2026
  - Foie gras in DC and ~~maybe~~ probably Denver
  - Lobbying for foie, fur, and other small wins in Portland and surrounding cities
  - (Later in the cycle) Kick off in a few new cities with electioneering
- 2028
  - Fur in DC
  - Pasture in Clackamas & Maricopa
  - Tbd in CO
  - Launch in several other cities with foie
- 2030
  - First statewide campaign: pasture in OR (or maybe somewhere else)
- 2032
  - Statewide pasture campaigns
    - Possible states: CO, OR, WA, AZ, NV, MI
- Late 2030s
  - Repeat loss states and tackle more challenging states: CA, OK, OH, FL
- 20??
  - Whenever ASI is poised to solve cultivated meat, pivot to repealing cultivated meat bans<sup>1</sup>

### One more advisor conversation: Josh Balk

Josh is a key advisor to us for two reasons. First, he has more experience running ballot measures than practically anyone in the movement, with a perfect winning record. Second, his experience and record have earned him enormous influence among potential funders and allies, including Humane World for Animals.

Eva and I spoke with Josh the second week of April. There were two important takeaways from the conversation. First, we discussed Josh's experience with polling on his measures. He's previously said he wouldn't run a measure that polled under 60%, but notably, all of his measures *passed* by more than 60%. I asked if his campaigns came in under polling, and he acknowledged that his campaigns all maintained the support they originally polled at. He pointed out that HSUS usually weren't outspent by their opponents, but was interested to learn that we held onto our support despite being dramatically outspent. We considered whether that

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<sup>1</sup> Subject of another doc for another day 😊

had to do with the initially low support, i.e. there are 36% of people who'll vote with us no matter what, but eventually agreed that the size of that nearly-unshakeable base is different for each policy, and that's exactly what polling measures. Ultimately, we converged on something like the "critical threshold" model described in the dialogue, and Josh ended in favor of the Denver campaign.