THE INS AND OUTS OF FIELD REPORTS

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Hi everyone. This is Adeline DeYoung, CCL Project Specialist, and this is Sandy Simon, CCL Help Desk Coordinator. Welcome to our lesson on field reports. We appreciate you taking the time to watch this short video on submitting field reports. We track our activity in CCL using the field report form, and this lesson will give you information on the ins and outs of reporting.
What is a field report?

- A field report is a form which field reporters complete online.
- The data contained in the report is used to demonstrate to members of Congress, the media, foundations, donors and others that our volunteers are actively engaged in building political will in tangible ways.
- The information in a submitted field report comes back to the field reporter immediately in an email confirmation, as well as in a report to group leaders once a month.
Who are “field reporters?”

- Any designated volunteer
- Usually one per group

- A field reporter is a designated volunteer in a group who files all of the reports for the group’s activities and published media.
- Usually one person in each group is assigned to this task, and group members are reminded to report their activity to the “field reporter.”
- Although in some groups the field reporter is the group leader, this is not always the case, especially in larger groups.
- Any detail-oriented person can do this job! In a few very active groups, two people may be designated to do field reporting, for instance one to do published media and the other to report on other activities.
When to submit a field report

- Ideally, ASAP!
- By the Wednesday before the monthly international conference call

When to submit a field report
- We appreciate your submitting reports as soon as possible after the print media publication or event occurs.
- Some reporters find it easiest to create reports as events take place, and we encourage groups to do this so that none of our published media and activities fall through the cracks.
- Whether you report events as they occur or only once a month, it’s important that group reporting for the previous month be up-to-date by the Wednesday before the next month’s monthly international conference call.
TYPES OF EVENTS FOR WHICH FIELD REPORTS ARE FILED

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This is what a field report form looks like. When you get to the page to file a field report, you’ll have a drop down menu where you can select which type of field report you are filing. Sandy will tell you about print media field reports.

Make sure you select the correct type since some of the forms look identical.
Articles

- Use this form to report articles (print or online) that cover or mention CCL volunteers or activities.
- Articles are almost always written by a publication’s reporter.
Editorials

- Editorials are opinion pieces written by the editors of the newspaper, not by volunteers or columnists.
- Report editorials that we can reasonably say we have influenced in some way, such as after an editorial board meeting, providing information, sending an editorial packet, or other communication with one of the editors.
- They do not need to mention Fee and Dividend or CCL, but we love it when they do.
- To determine whether an editorial should be counted, ask yourself "Does this piece build political will for action on climate change?" and “Did someone connected to our group influence the editors in their writing of it?"
- If more than one CCL group relates to this paper, make sure only one group files a field report for the editorial.
Editorial Board Meeting

- Use this form to report meetings with the editorial board, even if it included just one editor.
- In the meeting notes, state who was present - both CCLers and the newspaper’s staff - the topics discussed, actions agreed to, and who is following up.
Letter to the Editor

- Written by CCL volunteers
- Do not have to mention Fee and Dividend or CCL
- Ask yourself "Does this piece build political will for action on climate change?"

Letters to the Editor

- Use this form to report letters to the editor written by CCL volunteers that have been published either in print or online.
- Although the letters do not have to mention Fee and Dividend or CCL, we love it when they do. To determine whether a letter should be counted, ask yourself "Does this piece build political will for action on climate change?"
- Letters to the Editor are generally between 150-300 words, depending on the newspaper’s guidelines.
Op-eds and Guest Columns

- Use this form to report op-eds, guest columns and viewpoints written by CCL volunteers that have been published either in print or online.
- Although they do not have to mention Fee and Dividend or CCL, it's great when they do! To determine whether it should be counted, ask yourself "Does this piece build political will for action on climate change?"
- Op-eds are much longer than letters to the Editor, generally between 600-1300 words, depending on the newspaper's guidelines.
- And now Adeline will tell you about the other types of field reports.
Outreach

- Outreach events are things where CCL was in the public eye.
- They include tabling events and presentations.
- They do not include events that volunteers attended. For example, your monthly chapter meeting does not need to be recorded as an outreach event.
- If you collected postcards or letters at the event, report that separately under “Personal Letters to Members of Congress.”
Personal Letters

- Report letters or postcards that you are sure have been sent by postal service or web form, or will be delivered to their office.
- You only need to enter the total number of pieces of mail/webmail for each MOC.

**Personal Letters**
- Use this form to report letters or postcards that you are sure have been sent by postal service or web form or will be delivered to their office.
- Don't include emails to staff.
- You only need to enter the total number of pieces of mail/webmail for each MOC.
- You can enter the month's total all at once, using the last day of the month as the date or you can enter each letter-generating event as it happens.
- You can count and report letters to your member of Congress using their constituent contact webform. As with our paper letters, these communications should be personalized by the constituent, not copied and pasted verbatim from a template.
- If you have an outreach event that generates letters or postcards, you'll need to submit two Field Reports -- one for the event itself under Outreach, and a second for the number of Personal Letters generated.
Radio and TV

- Use this form to report radio and TV stories about CCL, interviews, public service announcements and anything else where CCL is on the air or has influenced the station to cover climate or carbon fee and dividend.
Meeting with Member of Congress/Other

- Meetings with Members of Congress are filed in a separate field report system.
- Once you click any ‘file field report’ button, you will see an option to follow a separate link to submit meeting minutes. Or, you can…
- Follow this link: https://community.citizensclimatelobby.org/meeting-minutes/ to enter meeting notes for meetings with a member of Congress or to record CCL questions asked at MOC town halls.
- For meetings with others such as Non-governmental organizations (NGOs), influential community leaders, or candidates, use the Outreach Database, also known as the Endorser Program database. You can use the Notes section to record information about your meetings, such as with city councilmembers when working on a municipal resolution. For questions concerning the database, email endorse@citizensclimatelobby.org
- At this time, we are not collecting data on emails to congressional staff or phone calls to congressional offices or local elected officials.
- Now Sandy will cover some of the common field report mishaps and best practices.
Common Field Report Mishaps and Best Practices

<table>
<thead>
<tr>
<th>Auto fill</th>
<th>Incorrect type of field report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of publication</td>
<td>Missing links</td>
</tr>
<tr>
<td>Name of author</td>
<td>Use the correct dates</td>
</tr>
</tbody>
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Common Field Report Mishaps and Best Practices

- **Auto fill**: By far the most common error in field reports occurs when auto fill automatically enters the field reporter’s name in the Media Title field instead of putting in the newspaper’s name. Be on the lookout for auto fill errors and watch for this, especially when using a Chrome web browser.

- **Name of publication**: Fill in the full and correct name of the publication in which the published media appeared in the field “Name of Media/Publication.”

- **Name of author**: This can be the same name as the field reporter but often is not.

- **Incorrect type of field report**: Another common error is incorrectly identifying the type of field report being filed. An editorial is not an op-ed. Neither is an article. Please read the field report instructions carefully to determine the type of report being filed. In a nutshell: Op-eds and LTEs are written by CCL members. Articles are written by reporters. Editorials are written by newspaper editors.

- **Missing links**: Fill in a link to the published media whenever possible. LTEs and op-eds can often be found with a Google search using the name of the newspaper and the newspaper’s assigned headline. If possible, go to the newspaper’s online website and find the published media. Copy and paste the link into your field report. Most newspapers
have an online edition as well as an e-edition and hard copy print edition. Online content readers are generally subscription only services. Please do not include e-reader (subscription only) links.

- Use the correct dates: The date of publication should always be before or on the same day as the date of submission of the field report. A common mistake is to enter the wrong month of publication. For an activity, use the date that the activity actually happened, not the date you are creating the report.
Common Mishaps & Best Practices

- Editorial reprints
  - Classify as op-eds

- Articles
  - Copy and paste the complete article text into the field report whenever possible. In the case of hard copy only articles, send a readable digital copy of the article for review to fieldreports@citizensclimate.org.

- Text of LTEs and op-eds
  - Please copy and paste the entire text of the published media you are reporting.

- Editorial reprints: Editorials which are originally published by one newspaper’s editorial board are sometimes reprinted by other newspapers. These reprints should be classified as “op-eds” rather than editorials.
- Articles: Copy and paste the complete article text into the field report whenever possible. In the case of hard copy only articles, send a readable digital copy of the article for review to fieldreports@citizensclimate.org.
- Text of LTEs and op-eds: Please copy and paste the entire text of the published media you are reporting.
CCL uses the information from field reports in many ways:

- Monthly National Call Meetings
- Meetings with members of Congress
- Congressional Education Day
- The CCL website
- Handouts
- In general, to share our progress with others

- CCL uses the information from field reports in many ways:
  - Monthly stats are shared at the monthly National Call meetings
  - Danny reads through every meeting minutes form submitted from Lobby Day to help determine how CCL is progressing with Congress
  - Our CCL website shows current and past statistics based on our field reports (CCL main website – About – Accomplishments)
  - Handouts with CCL statistics that can be found under event resources on Community
  - Having accurate information about published media, outreach events, meetings with members of Congress allows us to share our progress with other NGOs, members of Congress, donors and funders, and to the general public.
Accuracy matters

- The integrity of our data
- Please try to avoid submitting duplicate field reports
- If more than one chapter was involved, make sure only one chapter is filing a report.
- Double check the information in your report before hitting the blue Save button.

Accuracy matters
- The integrity of the data matters—we would like it to be complete and accurate, and we are grateful for your help with this.
- Please try to avoid submitting duplicate field reports and be as thorough as possible in your reporting.
- If an activity involved more than one chapter (such as tabling or a lobby meeting), only one report should be submitted, so please decide among the groups which one will file the report.
- Since you can’t go back and correct a report yourself once it’s submitted, please double check all of the information in your report before hitting the blue Save button.
Where to go to for answers and corrections

- If you discover that you overlooked an activity that needed reporting, you can do it at any time. No report is too late to file!

- If you accidentally created a report twice for the same event or made a mistake on a report, please send an email explaining the error to fieldreports@citizensclimate.org.

- Be sure to include the field report number you were sent in a confirmation report.

Where to go to for answers to questions and to correct errors

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- If you accidentally created a report twice for the same event or made a mistake on a report, please send an email explaining the error to fieldreports@citizensclimate.org.

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THANK YOU for filing field reports, and especially for your group’s work in the community that leads to field reports being submitted. Our teamwork is making a difference! For general questions about field reports, please email us at fieldreports@citizensclimate.org.
**Where to go to file a field report**

There are several ways to access the field report form on Community:

- The direct URL: [https://community.citizensclimate.org/tools/meeting-minutes](https://community.citizensclimate.org/tools/meeting-minutes)
- Under the “My Tools” section of your CCL Dashboard (home) page
- Through the Group Administration Topic page and Submitting Field Reports training
- Typing “field report” on any search bar within CCL Community
QUESTIONS

email: fieldreports@citizensclimate.org

fieldreports@citizensclimate.org