To: EDF Action Supporters and Allies
From: David Kieve, President, EDF Action
Date: August 3, 2026
Re: EDF Action Sets $15 Million Political Investment Goal for Emerging 2026 Wave Election

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Overview

EDF Action and partnered entities plan to invest $15 million in the 2026 elections as a potential wave election comes into focus. In addition, we are urging supporters and allies to go all-in on 2026 to maximize our collective impact. This is for three key reasons:

1) **The Threat is Urgent**
Trump Administration energy and environmental policies threaten to do lasting damage. Electing a Congress that will stand up to Trump is essential to halting further damage.

2) **The Opportunity for Big Gains is Real and We Should Look to 2018 for Guidance**
A wave election looks increasingly likely. It's essential to take advantage of this opportunity to stop the current threat and build toward ambitious policy goals in the future. Some of the most impressive young stars of the party came from districts in 2018 that were not on the initial radar— candidates like Govs. Mikie Sherrill and Abigail Spanberger or Senator Elissa Slotkin.

3) **EDF Action is Expanding the Map in Areas that Favor Our Strengths**
Wave elections broaden the map, expanding the battleground beyond the traditional swing districts. EDF Action is committed to pushing the boundaries of the map in places that create opportunities to defeat some of the most extreme anti-environment incumbents. Rather than focusing primarily on the more moderate members who are typically the most vulnerable, we plan to leverage this opportunity to connect energy policy to issues for affordability and the Trump Administration's broken promises.

Winning in key races in 2026 not only helps us limit the damage, but will set up a positive agenda in the post-Trump era.

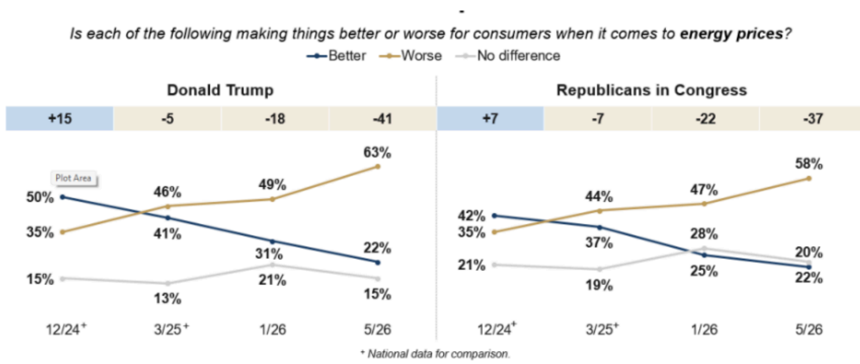
Background

A Critical Election

Environmental priorities are under assault and this election cycle will be critical in stopping the damage and building a cleaner future for all Americans. Seemingly every day the Trump Administration delivers a new threat to the environment and public health. From cancelling approved clean energy projects and forcing utilities to keep aging coal plants online, to rolling back protections against toxic chemicals and air pollution, this Administration is threatening long-standing damage to our environment that could take many years to fix. November's elections offer a path to stop the worst damage: a Congress that stops misuse of taxpayer dollars for dirty coal; more Senators who will thoroughly vet key nominees; and state officials who can balance federal rollbacks with forward movement.

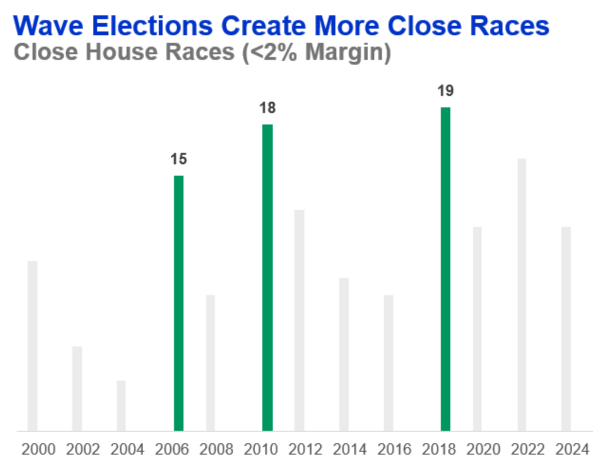
An Electoral Rebuke for Environmental Rollbacks

President Trump's energy and environmental positions are making electoral trouble for MAGA allies. Polling shows voters think the Trump energy policies have made energy prices worse. Specific policies such as forcing ratepayers to bear the cost of keeping old coal plants online, halting approved clean energy projects and bailing out special interest energy allies at taxpayer expense all have the potential to further solidify voters against MAGA allies on the ballot.



A Wave Increasingly Likely

With the president's approval below 40 percent, conditions for a wave election are coming into place. Importantly, past elections show wave elections create more close races—with more races on the board there will be more chances for investment to swing the outcome. The opportunities tend to come in the more challenging districts: in 2018, 13 of the 17 closest races came from seats rated Lean or Likely Republican, not Toss-Ups. Races on the outer fringe receive less investment overall, meaning additional investment in these races could make the difference. Moreover, incumbents in these districts tend to be more extreme, creating more vulnerabilities with the electorate and more opportunity to bring significant change by electing more pragmatic alternatives.



Impact Beyond 2026

Elections like this one have both immediate consequences, like stopping the Trump Administration's assaults on clean energy and pollution protections, and long-lasting consequences including U.S. Senators, governors and other state officials whose terms will last beyond the current administration. We need not look further than 2018 for an example of how the rising stars and majority makers who get elected in 2026 will chart the course for elections years down the line. The class elected that year included future Senate leaders Elissa Slotkin and Andy Kim, future governors Abigail Spanberger and Mikie Sherrill, and a host of influential voices who continue to shape policy at every level of government.

Closely divided legislative chambers in states such as Arizona could shift in 2026 and meaningful gains are possible even in unlikely states such as Texas. The 2026 elections are not simply about defense: they are critical to being able to deliver durable policy gains at the federal level well into the next decade.

Investment Matters

In recent wave cycles there have been more than a dozen US House races, and more than 200 state legislative races, decided by margins of less than 2 percent. In every election cycle over the past decade, at least one U.S. Senate race has been decided by 1 point or less—with winners serving six-year terms that shape the chamber for years after. EDF Action aspires to engage in these races—races where we can be impactful and sometimes determinative. Over a decade of political engagement, EDF Action and EDF Action Votes have engaged in two dozen federal races decided by margins of 2 percent or less.

While the levels of political spending can prove mind-boggling, history shows that wave elections deliver opportunities to make an impact with strategic investments. In 2018, the last wave election, outside groups spent an average of $12M per race in toss-up House districts — more than eight times the $1.4M average in Likely Republican seats. Yet 11 of those Likely Republican races were decided by under 5 points, and 3 by under 2 percent. Across Lean and Likely Republican districts combined, 27 races came within 5 points despite attracting a fraction of toss-up spending. The races that broke late were the least resourced — and that is where EDF Action has historically found its greatest leverage.

AdImpact projects $11.6B in total political spending in 2026, but a small share of races will absorb the lion's share of that spending.

The peripheral races that still get decided by a point or two remain structurally under-resourced, and that's where EDF Action and EDF Action Votes can have a disproportionate impact. Their model is designed to identify races where additional investment can still change the outcome, rather than competing in contests already saturated with outside spending. In 2024, that approach paid off: EDF Action Votes ranked among the top non-party outside spenders in four of the most competitive House races in the country.

EDF Action Investment

EDF Action’s $15 million goal includes political spending from partnered entities: independent expenditures by EDF Action Votes (a SuperPAC) and a robust ground game funded by EDF Action PAC that embeds EDF Action members in some of the country's closest races.

Conclusion

Despite recent setbacks, the country is approaching a defining moment for environmental progress. Renewable energy is ready to deliver what fossil fuels cannot: cleaner energy that makes life more affordable. This election offers voters an opportunity to rebuke politicians who sought to thwart this progress. But it also offers the chance to begin shaping the future of environmental policy. EDF Action is prepared to seize this opportunity and meet the moment.