

# WORKING WITH CANDIDATES:

## Candidate Forums, Appearances and More

All attendees will receive a copy of this PowerPoint presentation and a link to the recorded webinar

Presented by



# ABOUT US

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Founded in 2005, Nonprofit VOTE partners with America's nonprofits to help the people they serve participate and vote.

We are a leading source of nonpartisan training, materials and other resources for nonprofits doing voter engagement work.

Find out more about our mission and partners on our site  
[www.nonprofitvote.org](http://www.nonprofitvote.org)



# TODAY'S PRESENTERS

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Cheryl Clyburn Crawford  
Executive Director  
MassVOTE



Julian Johannesen  
Director of Research  
Nonprofit VOTE

# AGENDA

- ✓ CANDIDATE FORUMS
- ✓ CANDIDATE APPEARANCES
- ✓ SHARING RESEARCH AND QUESTIONNAIRES



# CANDIDATE FORUMS

- ✓ Collaborating with partners
- ✓ Organizing the forum
- ✓ Staying nonpartisan



# WHY HOST A CANDIDATE FORUM

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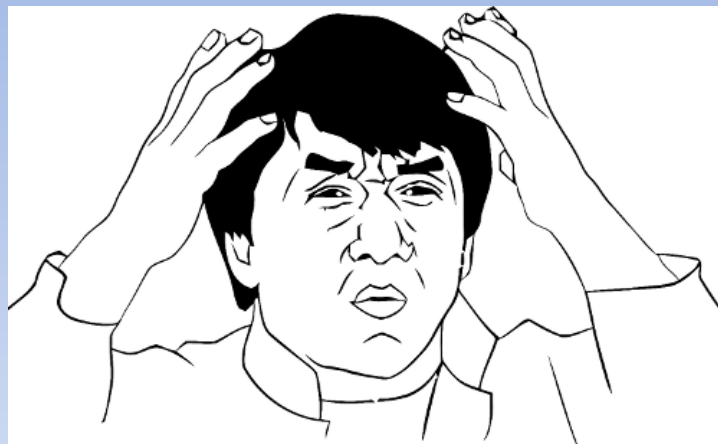
- Get your issues in front of the candidates and future office holders
- Provide an opportunity for voters to learn about and meet the candidates
- Build relationships with the candidates
- Become known as an organization connected to politics



# PARTNERS: CHALLENGES

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- Coordinating meetings
- Maintaining communication
- Sharing the work – one group takes the lead

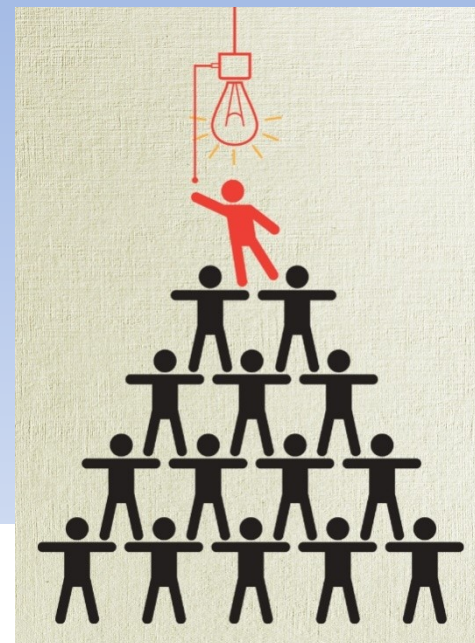


# PARTNERS: BENEFITS

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## Having co-sponsors...

- Increases the likelihood that candidates will participate
- Can mean a larger audience turnout
- Strengthens relationships for future work



# ORGANIZING

- ✓ GETTING STARTED
- ✓ RECRUITING CANDIDATES
- ✓ CHOOSING A FORMAT
- ✓ TURNING OUT YOUR AUDIENCE
- ✓ PUBLICITY



# GETTING STARTED

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- Starting early
  - 4 months out from event
- Having a plan
  - A date, a location, etc.
- Targeting your audience



# RECRUITING CANDIDATES

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## Candidates want...

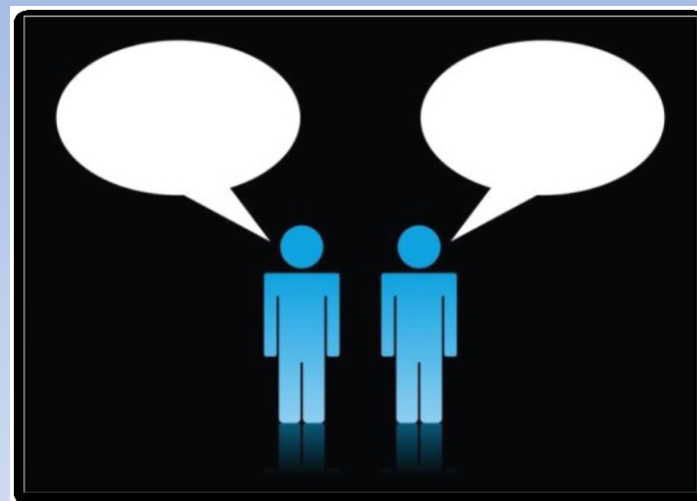
- A large audience
- A guarantee of neutrality
- Well known and respected sponsors and partners
- Time at the forum to meet with the audience informally



# CHOOSING A FORMAT

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- Equal Time Q&A – The standard format
- Other Formats



# TURNING OUT YOUR AUDIENCE

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- Planning early and starting early
- Targeting your audience
- Making it personal



Organizing

# PUBLICITY

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- Using all your communications vehicles
- Recruiting a media partner
- Getting a well known moderator



Organizing

# STAYING NONPARTISAN

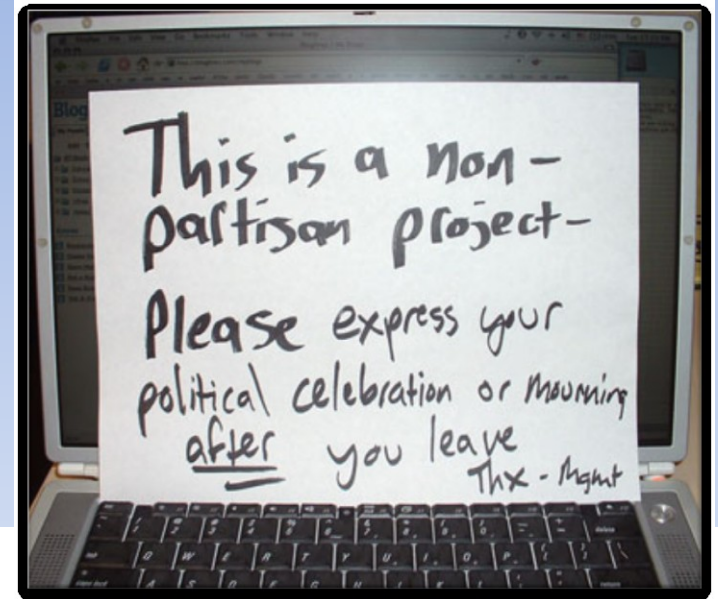
- ✓ THE BASICS
- ✓ INVITING CANDIDATES
- ✓ CANCELLATIONS
- ✓ DURING THE FORUM



# THE BASICS

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- Cover a range of issues or topics within your own issue area
- Provide equal time for the candidates during the forum
- No “litmus test” questions



# INVITING CANDIDATES

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- Ask all viable candidates to attend
- Follow up
- Must have at least 2 candidates to have a “forum”



# CANCELLATIONS

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- For last minute cancellations, either cancel or change from a forum to a candidate appearance
  - No politicking or fundraising
  - Announce that appearance is not an endorsement



# DURING THE FORUM

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- Maintain a nonpartisan atmosphere in the hall
- No leading or biased questions
- Allow candidates to meet voters after the forum and allow literature outside the hall





## Candidate Forum Checklist

### BEFORE THE EVENT

#### 4 MONTHS:

- ☐ Approach partners about collaborating
- ☐ Select potential dates and locations for the forum
- ☐ Decide on a forum format.
- ☐ Draft a budget

#### 3 MONTHS:

- ☐ Contact the candidates. Get their agreement on participating and dates.
- ☐ Make preliminary media contacts to promote and cover the event

#### 2 MONTHS:

- ☐ Select a moderator
- ☐ Follow up on the candidates.
- ☐ Develop a plan for publicity and audience turnout

#### 1 MONTH:

- ☐ Final confirmation of candidates
- ☐ Reconfirm site arrangements
- ☐ Recruit and confirm volunteers
- ☐ Create promotional materials: poster, social media, press release.
- ☐ Ramp up media contact and other communications.

#### LESS THAN 1 MONTH:

- ☐ Continue to recruit attendees. Emails, social media, calls.
- ☐ Contact volunteers to confirm their duties at the forum
- ☐ Final media reminders and press release
- ☐ Select a timekeeper
- ☐ A/V and other advance set up arranged.

### ON THE DAY OF THE EVENT

- ☐ Complete set-up at forum
- ☐ Have staff or volunteers greet people
- ☐ Set up the head table, hall and A/V
- ☐ Open the forum with a welcome and thank yous
- ☐ Review ground rules for forum for candidates and attendees
- ☐ Budget time for informal Q&A or mingling after the forum



Gubernatorial Forum sponsored by the Providers Council of Massachusetts – 2010 – Faneuil Hall

### AFTER THE EVENT

- ☐ Send thank yous to the candidates, moderator and others
- ☐ Share your success

#### Resources

A Nonprofit's Guide to Hosting a Candidate Forum, [www.nonprofitvote.org/candidate-engagement-2](http://www.nonprofitvote.org/candidate-engagement-2)



## Lista De Comprobación Para Foros De Candidatos

### ANTES DEL EVENTO

#### 4 MESES:

- ☐ Hablar con socios sobre la posibilidad de colaborar.
- ☐ Elegir fechas y lugares posibles para el foro.
- ☐ Decidir el formato del foro.
- ☐ Preparar un presupuesto.

#### 3 MESES:

- ☐ Comunicarse con los candidatos. Conseguir que acepten participar y confirmar las fechas.
- ☐ Hacer contactos preliminares con los medios para que promuevan y cubran el evento.

#### 2 MESES:

- ☐ Elegir un moderador.
- ☐ Volver a comunicarse con los candidatos.
- ☐ Preparar un plan de publicidad y asistencia del público.

#### 1 MES:

- ☐ Confirmación final de candidatos.
- ☐ Volver a confirmar con el sitio.
- ☐ Reclutar y confirmar voluntarios.
- ☐ Crear materiales promocionales: carteles, medios sociales, comunicado de prensa.
- ☐ Intensificar el contacto con medios y otras comunicaciones.

#### MENOS DE 1 MES:

- ☐ Seguir reclutando asistentes. Correo electrónico, medios sociales, llamadas.
- ☐ Comunicarse con voluntarios para confirmar sus funciones en el foro.
- ☐ Últimos recordatorios a los medios y comunicado de prensa.
- ☐ Seleccionar quién llevará cuenta del tiempo (cronometrador).
- ☐ Hacer arreglos para el equipo audiovisual y otros preparativos preliminares.



Foro de gobernadores patrocinado por el Providers Council de Massachusetts - 2010 - Faneuil Hall

### EL DÍA DEL EVENTO

- ☐ Completar los preparativos para el foro.
- ☐ Hacer arreglos para que los empleados o voluntarios reciban a la gente.
- ☐ Configurar la mesa principal, la sala y el equipo audiovisual.
- ☐ Abrir el foro con un mensaje de bienvenida y agradecimiento.
- ☐ Repasar las reglas básicas del foro para los candidatos y los asistentes.
- ☐ Planificar tiempo para preguntas y respuestas informales y para que la gente se reúna después del foro.

### DESPUÉS DEL EVENTO

- ☐ Agradecer a los candidatos, al moderador y a otros.
- ☐ Difundir el éxito del evento.

#### RECURSOS

A Nonprofit's Guide to Hosting a Candidate Forum, [www.nonprofitvote.org/candidate-engagement-2](http://www.nonprofitvote.org/candidate-engagement-2)

Hunger Housing Advocacy  
Environment  
Immigration Child Care  
Families Human Services Arts  
Education Neighborhoods  
Disabilities Jobs  
Community Social Services Literacy  
Youth Citizenship



## A Nonprofit's Guide to Hosting a Candidate Forum

[www.nonprofitvote.org](http://www.nonprofitvote.org)

Prepared by the  
Nonprofit Voter Engagement Network  
A national nonpartisan program of  
Minnesota Council of Nonprofits



# CANDIDATE APPEARANCES



# 3 WAYS CANDIDATES MAY APPEAR

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During an election season, candidates may appear at your nonprofit in one of three ways:

- As a candidate
- As a public figure
- On their own at a public event



# APPEARING AS A CANDIDATE

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## If you invite candidates to *the same* event:

- Invite all candidates in the same race (they don't all have to come)
- Campaigning and political fundraising are prohibited
- Remind the audience this is a nonpartisan event

## If you invite candidates to *different* events:

- Provide all candidates with a similar opportunity to speak to your audience – similar time, venue and format

presentation  
appearance

# APPEARING AS A PUBLIC FIGURE

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You may want to invite a candidate to an event in their capacity as a current or former office holder, an expert in their field, or as a celebrity. If so:

- The public figures candidacy can play no part in your decision to invite them
- Their candidacy may not be mentioned
- Campaign activity of any type is prohibited



# SHARING RESEARCH AND CREATING QUESTIONNAIRES



# SHARING RESEARCH

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You may share research with candidates, as long as

- The same information is to all candidates



You may respond to requests for information from candidates, as long as

- You do not expend resources creating new research or information



# CANDIDATE QUESTIONNAIRES

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- Ask questions on a range of topics
- Not just yes or no. Let candidates explain view, but give a word limit
- Send it to all candidates in the race
- If a candidate doesn't respond - may list "no response" or use official statements from the candidate's website



Research  
& More

# Candidate Questionnaires and Voter Guides

Nonpartisan Guidelines for 501(c)(3) Organizations

## CANDIDATE QUESTIONNAIRES

Candidate questionnaires are a good way for your organization to help your clients and constituents become familiar with the candidates and their views. It's also an effective way to let candidates know what issues are of concern to you and your community.

Creating a questionnaire and getting candidates to respond takes time and persistence. Consider partnering with other organizations or forming a coalition to distribute the workload and increase the likelihood that your questionnaire will be taken seriously. Be prepared to do a lot of follow up with candidates and their campaigns. Keeping the questionnaire relatively short will increase the likelihood of getting responses.

501(c)(3) nonprofits must remain nonpartisan. A questionnaire or guide cannot be created and distributed with the intention of swaying voters for or against specific candidates. Your goal should be to provide nonpartisan education about the candidate's positions on issues important to you and the general public.

### Content

- Include questions on a broad range of issues or a range of diverse topics within an area of focus like education or immigration reform.
- Keep your questions open-ended. Avoid yes/no, support/oppose or multiple choice formats. Candidates must be allowed to explain their answers within a reasonable word limit.
- Questions should be neutral and not hint at a "correct" answer

### Distribution to Candidates

- Distribute the questionnaire to all candidates running for the same office.
- Allow sufficient time (three-four weeks) to follow up with the candidate's campaign. Do follow up by email and phone.

- Don't share one candidate's answers with another candidate before the final questionnaire or guide is published.
- You may answer questions about the questionnaire or clarify the meaning of a question, but don't coach the candidates on their answers. Nor should you ask or alter a question at a candidate's request.

### Publishing the results

- Publish the responses of the candidates without editing/paraphrasing. As noted you can set a word limit for answers
- Make the responses publically available to your audience and the general public on your website.
- Do not rank or comment on candidates' responses

#### What if a candidate does not respond?

Assuming you've made repeated attempts to get answers, you can list "did not respond". You may also include the candidate's position based on neutral and unbiased information from their website and publicly available sources. If you do, be sure to footnote where you got the information when you publish the results.

#### Can we share results if only one candidate responds?

No. In the case only one candidate responds, sharing the results would appear to reflect partisan support for that candidate. Only publish the results if at least two candidates respond. While it's always good to have responses from the leading candidates, you can publish the results if most of those running have responded.

# Cuestionarios para candidatos y guías para votantes

Normas no partidistas para organizaciones 501(c)(3)

## CUESTIONARIOS PARA CANDIDATOS

Los cuestionarios para candidatos son una buena manera en que su organización puede ayudar a sus clientes y a los votantes a familiarizarse con los candidatos y sus puntos de vista. También son una forma efectiva de informar a los candidatos acerca de los temas importantes para ustedes y su comunidad.

Crear un cuestionario y conseguir que los candidatos lo contesten lleva tiempo y perseverancia. Considere la posibilidad de asociarse con otras organizaciones o de formar una coalición para distribuir el trabajo y aumentar la probabilidad de que el cuestionario se tome en serio. Esté preparado para comunicarse repetidamente con los candidatos y sus campañas. Si el cuestionario es relativamente breve, es más probable que lo contesten.

Las organizaciones sin fines de lucro 501(c)(3) deben mantener la imparcialidad. No pueden crear ni distribuir un cuestionario o una guía con la intención de influir en los votantes a favor o en contra de candidatos específicos. La meta debe ser ofrecer información no partidista sobre las posiciones del candidato con respecto a los asuntos importantes para su organización y el público en general.

### Contenido

- Incluya preguntas sobre una amplia variedad de problemas, o de temas relacionados con un asunto específico, como educación o reforma migratoria.
- Haga preguntas abiertas. Evite formatos de respuesta de sí o no, a favor o en contra o de opción múltiple. Debe permitir que los candidatos expliquen sus respuestas con un límite razonable de palabras.
- Las preguntas deben ser neutrales, sin sugerir una respuesta "correcta".

### Distribución a los candidatos

- Distribuya el cuestionario a todos los candidatos que se postulan para un mismo cargo.
- Dele suficiente tiempo (de tres a cuatro semanas) antes de volver a comunicarse con cada campaña. Haga el seguimiento por correo electrónico y por teléfono.
- No comparta las respuestas de un candidato con los otros antes de publicar la versión final del cuestionario o de la guía.

- Puede contestar o aclarar el significado de las preguntas del cuestionario, pero no asesore a ningún candidato con respecto a las respuestas. Tampoco debe hacer ni alterar preguntas a pedido de un candidato.

### Publicación de los resultados

- Publique las respuestas de los candidatos sin editarlas ni aclararlas. Como se explicó anteriormente, puede establecer un límite de palabras para las respuestas.
- Ponga las respuestas a disposición de sus clientes y del público en general en su sitio web.
- No clasifique ni comente las respuestas de los candidatos.

#### ¿Qué ocurre si un candidato no contesta?

Si ha hecho varios intentos de conseguir respuestas, puede poner que "No respondió". También puede incluir la posición de un candidato basándose en información neutral y objetiva de su página web y de fuentes públicas. Si lo hace, cuando publique los resultados, asegúrese de incluir una nota de pie de página citando la fuente de la información.

#### ¿Se pueden difundir los resultados si contesta sólo un candidato?

No. Si responde sólo un candidato, la publicación de los resultados podría dar la apariencia de apoyo partidario a ese candidato. **Publique los resultados solamente si contestan al menos dos candidatos.** Aunque siempre conviene tener respuestas de los candidatos principales, puede publicar los resultados si la mayoría de los que se postulan a un cargo han respondido.

# VOTER ENGAGEMENT



# RESOURCE LIBRARY

MAKING A  
PLAN

STAYING  
NONPARTISAN

VOTER  
REGISTRATION

VOTING IN  
YOUR STATE

BALLOT  
MEASURES

CANDIDATE  
ENGAGEMENT

GETTING OUT  
THE VOTE

ENGAGING  
YOUR STAFF

VOTER  
TURNOUT

OUR  
RESEARCH



## TOOLKITS & GUIDES

### Hosting a Candidate Forum

To-do lists, dos and don'ts, and a planning timeline, as well as tips on how to attract candidates, select a format, publicize the event, and ensure your forum stays nonpartisan.

[DOWNLOAD PDF](#)

[DOWNLOAD PDF IN SPANISH](#)



## CHECKLISTS

### Candidate Forum Checklist

A countdown to your candidate forum beginning four months out with a checklist of items for each month and the days and weeks leading up to the event.

[DOWNLOAD PDF](#)

[DOWNLOAD PDF IN SPANISH](#)



## FACTSHEETS

### Working with Candidates

Learn how nonprofits can engage candidates on a nonpartisan



## FACTSHEETS

### Candidate Appearances at Your Nonprofit Event

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