

Voter Education Toolbox

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prepared by

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and

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Voter Education Options

There are many different options for nonpartisan voter education that your nonprofit can utilize. This toolbox is focused primarily on candidate events, candidate questionnaires and voter guides. The last three options, legislative scorecards and voting records, issue advocacy, and candidate education, are discussed here with key points for organizations interested in pursuing them.

Candidate Events: Debates, forums, meetings or fairs, candidate events are designed to connect candidates with their constituents and communicate to them their positions on key issues. As nonprofits, we are poised in a unique position; our nonpartisan nature helps ensure that the event is not biased, which attracts candidates, while also connecting the people and communities to an excellent opportunity to become better acquainted with the candidates for public office.

Candidate Questionnaires and Voter Guides: As a part of your voter education efforts, you may consider putting together a voter guide to educate the public on each candidate's positions. There are two steps to creating a voter guide: 1) creating and sending out your questionnaires, also called surveys, to the candidates and 2) compiling and publishing the responses.

Legislative Scorecards and Voting Records: Both of these are used to report how incumbents voted on important issues. For legal reasons, neither of these voter education options may be timed to coincide with an election. There are also key differences between them. Voting records must be made available to the general public and legislators, they must cover a broad range of issues, and no commentary is allowed. Legislative scorecards, on the other hand, may only be distributed to members of your organization and legislators, can cover only those issues that are important to your nonprofit, and allow for scoring and commentary. For the purposes of 501(c)(3)s, both are allowable forms of voter education but care should be exercised by any organization that desires to issue a legislative scorecard, since scoring incumbents can indicate a bias for a particular candidate. Be sure to see the section on legislative scorecards and voting records in this toolbox for more specific dos and don'ts.

Issue Advocacy: Many organizations create fact sheets and information on the key issues that affect their organization or the people they serve. During an election year, these may be included as a part of your voter education efforts. However, it is especially important during election years that your issue advocacy is done in a nonpartisan way and that there is no "ramping up" of your organizations activities. You should not be creating new fact sheets which are special for the election. Rather, you should continue to use materials that were put together prior to the election season or develop your materials well in advance of the election so as to avoid the appearance of electioneering.

Candidate Education: You may educate candidates on the key issues that affect your community or your nonprofit. Typically, this involves a meeting between your organization and the candidate so that you can convey your position.

MPP: How to Host a Successful Candidate Forum

Forums are opportunities for improving knowledge of societal issues and the election process; therefore, planning is essential. These easy steps should prepare you for hosting a successful forum.

Before the forum:

- Allow plenty of time for proper planning.
- Decide on forum format.
- Begin volunteer recruitment.
- Collaborate with other local nonprofits.
- Make media contact/get coverage.
- Become aware of Legal Limitations (consult handbook).

Select a Format *(for more, see the next section):*

- **Equal time Q&A:** An impartial moderator and panelist's questions candidates. Candidates are given equal amounts of time to respond. Candidates do not need to be asked the same questions, only given the same amount of time.
- **Prepared and Spontaneous Debate:** Candidates receive questions prior to debate that elicit specific responses. Candidates will answer these questions and those that arise from audience and moderator during debate.
- **Follow-up Q&A:** The moderator and panelists ask questions of the candidates. Follow-up questions are permitted (to avoid evasive answers), follow-up questions by opponents force candidates to present exact answers.
- **Discourse Debate:** Moderator asks questions, candidates discuss the issue. It is very important to have moderator control dominating candidates. Strong nonpartisan moderator is a must for this forum.
- **Town Meeting Q&A:** Members of audience ask questions. People asking questions will educate the candidate to the concerns of constituency.
- **Feedback/hearings:** The focus of this forum deals with issues specific to your organization. An expert presents concerns and solutions. The candidates respond to the concerns presented and make closing remarks.
- **Adding on informal Q&A:** With any format, you may add an informal Q&A session at the end of formal forum.

What not to do in planning a forum:

- Do not start planning late.
- Do not assume people will attend. Remind constantly.
- Do not underestimate the power of media; be sure to follow up.
- Do not forget to instruct people on what will happen at the forum.
- Do not ignore special publications (La Prensa, Hmong Times, etc).

Tips for Inviting Candidates:

- Send out personal letter inviting candidate three months prior to holding forum.
- Emphasize that this is required to be nonpartisan because of legal requirements.
- Emphasize the impact nonprofit organizations have in the district.
- Follow up with candidates each month using different methods of contact (phone, face-to-face).

Getting the Media to cover your event:

- Get information to the media early. Be aware of media's deadlines.
- Try to be the earliest forum (in terms of date); media will be "fresh" and interested.
- Show the media that your forum will cover a large public appeal. It helps to get a forum's story to be told as part of a larger, regional story.

Selecting a Moderator:

- Find someone that lives outside of voting district and can be nonpartisan.
- Find someone that is well respected within your community (example: journalist).
- Prepare this person in advance (questions, review with them, do practice runs).

Selecting a Timekeeper:

- This should be a staff person with the main objective to keep the forum on schedule.
- This person should be able to interrupt people in order to keep time.
- Provide color-coded cards for timing (green = start, yellow = 30 seconds, red = stop).

Helpful Hints:

- Candidates want neutrality.
- Partner with a well known and well respected non-profit. The candidates are more likely to attend a forum if a non-profit has had a successful forum in the past.
- Make sure the topics in your forum cover a broad range of issues, including those of particular importance to the sponsor's members.
- Make sure you invite all major candidates in the district where forum is held.
- Generate a large audience.
- Very important to collaborate with other organizations. Combine efforts and increase chances that candidate will attend (officials are hard to get most of the time).

Timeline To-Do List

- **6 weeks until forum:** Collaborate with other nonprofits to choose date, time and place for forum. Decide format and develop budget. Initiate contact with candidates and with media.
- **5 weeks until forum:** recruit volunteers and follow up with invited candidates.
- **4 weeks until forum:** assign tasks to volunteers, confirm candidates, hold mock forum with staff, reconfirm staff arrangements, distribute promotional materials, contact media to confirm coverage.
- **Less than three weeks until forum:** select moderator, finish recruiting volunteers, recruit attendees, contact volunteers and confirm forum duties, confirm with media, write op/ed piece, select timekeeper
- **Day of forum:** set-up, greet audience and candidates, provide head table for candidates/moderator, welcome, review rules of forum, hold Q & A after forum.

Candidate Events: Finding Your Format

A great way to engage voters and acquaint them with the candidates and their issues is to organize a candidate event. There are many different formats to choose from – from a traditional debate style forum to something less formal, such as a candidate fair, with the opportunity for voters to speak directly with their elected officials.

General Rules around Candidate Events:

Federal Tax and Election Laws permit 501(c)(3) and (c)(4) organizations that do not endorse, support, or oppose candidates or parties to stage candidate events in which:

- the sponsoring organization invited all qualified candidates,
- an independent panel prepared the questions,
- the topics cover a broad range of issues, including those of particular importance to the sponsor’s members,
- each candidate has an equal opportunity to present his or her views, and
- the moderator is neutral and acts in an unbiased manner, including making a statement at the beginning and end of the program that the views expressed are not that of the sponsoring organization.

FEC rules, which the IRS is likely to follow, provide that at least two candidates must participate for the event to be nonpartisan; minor party candidates do not always have to be included. These rules apply to any candidate event, no matter the format.

Debates	Forums
<ul style="list-style-type: none"> - Equal time for each candidate - Candidates attend event at same time - Prepared and Spontaneous debate* - Discourse debate* 	<ul style="list-style-type: none"> - Equal time for each candidate - Candidates attend event individually <ul style="list-style-type: none"> - Town Hall* - Q and A*
Fairs	Meetings
<ul style="list-style-type: none"> - Equal time and visibility - Candidates table and speak with public 	<ul style="list-style-type: none"> - Equal time with each candidate - Representatives from organization meet with Candidates privately

* See page 2 of *A Nonprofit’s Guide to Hosting Candidate Forums* for details on these formats

Information in this document is courtesy of the Alliance for Justice, *The Rules of the Game: An Election Year Legal Guide for Nonprofit Organizations*. 1996. www.afj.org.

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Candidate Questionnaires and Voter Guides

As a part of your voter education efforts, you may consider putting together a voter guide to educate the public on each candidate's positions. As always, nonprofits can and should do this type of work, but should do it in a way that is nonpartisan and does not favor a candidate. There are two steps to creating a voter guide: 1) sending out your questionnaires, also called surveys, and 2) compiling and publishing the responses.

Key points for developing your questionnaire:

- Select questions that cover a wide variety of issues.
- Select questions that matter to the entire electorate.
- Questions that focus on issues of importance to your organization may be included so long as they are not biased, i.e., not worded so as to indicate the “right” response or otherwise reflect your organization’s agenda.
- Consider whether you want the candidate’s responses to be yes/no, support/oppose, multiple choice, or in an open-ended, written format.
- Give all candidates for the office an equal opportunity to participate.
- Wait until after the filing deadline for candidacy before sending out your questionnaire.
- In general, if you think the question is biased or will elicit a response that will clearly indicate your preference for or against a particular candidate, you probably shouldn’t ask it.

After you have determined the questions to be included in the candidate survey, it’s time to send them out and wait for responses. Candidates are becoming more and more reluctant to participate in questionnaires, so a good tip is to talk to the candidate or campaign manager before you send it out, and get their confirmation that they will fill it out and return it. Once you have received the responses to your questionnaire, it’s time to put together the voter guide.

Key points in developing your voter guide:

- If you choose to ask questions in an open-ended, written format you should:
 - Limit the number of words.
 - Print the candidate’s answers in full – do not paraphrase or summarize!
- Design a voter guide that doesn’t highlight or accentuate one candidate over another.
- Your guide should not suggest how people should vote.
- Do not score or rate the candidates’ responses
- Make your guide available to the general public

Helpful Hints from the Alliance for Justice*:

In evaluating all such questionnaires, the IRS mainly tries to decide if the overall impression given to the reader by the selection and presentation of issues “evidences a bias or preference with respect to the views of any candidate or group of candidates.” Consider these examples:

- The Friends of the Parks asks the candidates for mayor one question: “What are your views on the operation of our city parks?” The answers, limited to 100 words, are printed in full and distributed to the public

Arguably, this is a nonpartisan public service, particularly since voters are unlikely to learn the candidates’ views on the parks any other way. The question contains no bias and does not reflect any organizational agenda. Hopefully, the IRS would agree, even though the issue is narrow.

If the Friends instead asked, “What will you do to increase funding for the city parks?” then the questionnaire would be biased, because it would suggest what answer the organization would prefer to hear.

- The Progressive Forum poses a broad range of questions to candidates for U.S. Senator, asking for a single-word answer: “Support” or “Oppose”
 - “Do you support a woman’s right to choose to have an abortion?”
 - “Will you oppose repeal of the Endangered Species Act?”
 - “Do you favor cutting school lunch funds?”

Such questions reflect a particular agenda, and the answers are likely to indicate to the voter who the organization thinks is a better, more progressive candidate. The IRS would not approve.

On the other hand, if the Forum stated the same questions more neutrally (“What is your position on abortion?”) and mixed them in with questions about sending troops to Bosnia, repealing the gasoline tax, raising the minimum wage and increasing jail terms for child molesters, the nonpartisan informational value of the questionnaire could overcome any suggestion that it was designed to favor certain candidates over others.

**Examples are courtesy of the Alliance for Justice, *The Rules of the Game: An Election Year Legal Guide for Nonprofit Organizations*. 1996. www.afj.org.*

Legislative Scorecards and Voting Records

Legislative scorecards and voting records are an important tool in not only keeping elected officials accountable but also educating your members and subscribers as to how elected officials are voting. It is important to understand the distinctions and limitations of these two forms of voter education, as failure to follow these rules could compromise your tax exempt status.

As a 501(c)(3) organization, you can publish and distribute voting records and legislative scorecards, though there are certain rules and restrictions you must follow. These records and scorecards are most useful with state legislators and US senators and representatives. According to the Independent Sector's, *Playing by the Rules*, in order to maintain the nonpartisan character of legislative reporting, here are a few things you should keep in mind:

1. The voting records of *all* incumbent members of the legislative body who represent the region (e.g. Minnesota or Minneapolis) you're working in should be represented. You may NOT limit your voting or scorecard to a particular swing district.
2. The report should not identify legislators as candidates for reelection.
3. The voting records should not be linked to any election campaign.
4. Voting records should cover a broad range of issues.
5. Legislative scorecards can focus on specific issues of interest to the organization
6. Voting records that include any evaluation of the votes cast become legislative scorecards, at which point they MAY ONLY BE distributed to members and/or subscribers and MAY NOT BE targeted to areas where incumbents whose votes are reported are candidates for reelection.

Voting records differ from legislative scorecards in two significant ways. Voting records do not include any evaluation of how a legislator voted, and it may be made available to the general public. A legislative scorecard is a voting record that includes evaluation of how an official voted, and, with regard to a 501(c)(3), may only be distributed to members and/or subscribers.

IMPORTANT NOTE: In order to remain compliant with federal law, it is important to begin your voting record activities well before an election (prior to the few months leading up to an election). For example, if your organization is considering compiling voting records or scorecards after the 2006 legislative session, you should be developing and distributing your voting record or scorecard in 2005 or very early in 2006.

Planning Your Candidate Event

Pick Your Format

Candidate Forum

Candidate Debate

Candidate Meeting

Candidate Fair

Set the Dates for:

Candidate Forum
Candidate Invites
Confirmations
Moderator and
Timekeeper
Selection

August

September

October

November

S	M	T	W	U	F	S	S	M	T	W	U	F	S	S	M	T	W	U	F	S	S	M	T	W	U	F	S
		1	2	3	4	5						1	2	1	2	3	4	5	6	7				1	2	3	4
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7				
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21							
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28							
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31											

Potential Partners: Create a list of nonprofits with whom you have a relationship or are in your district

Where will you host your candidate forum? Think about neutral, easily accessible locations in your community

In what district(s) will you be conducting your candidate event?	1A 1B 2A 2B 3A 3B 4A 4B 5A 5B 6A 6B 7A 7B 8A 8B 9A 9B 10A 10B 11A 11B 12A 12B 13A 13B 14A 14B 15A 15B 16A 16B 17A 17B 18A 18B 19A 19B 20A 20B 21A 21B 22A 22B 23A 23B 24A 24B 25A 25B 26A 26B 27A 27B 28A 28B 29A 29B 30A 30B 31A 31B 32A 32B 33A 33B 34A 34B 35A 35B 36A 36B 37A 37B 38A 38B 39A 39B 40A 40B 41A 41B 42A 42B 43A 43B 44A 44B 45A 45B 46A 46B 47A 47B 48A 48B 49A 49B 50A 50B 51A 51B 52A 52B 53A 53B 54A 54B 55A 55B 56A 56B 57A 57B 58A 58B 59A 59B 60A 60B 61A 61B 62A 62B 63A 63B 64A 64B 65A 65B 66A 66B 67A 67B
Which candidates will you invite? To determine who is a candidate in your district, go to: candidates.sos.state.mn.us	
Who is your target audience?	
How will you publicize your candidate event? List specific media contacts.	<p style="text-align: center;"> <u>Radio</u> <u>Television</u> <u>Newspapers</u> <u>Your Contacts</u> </p>

<p>Develop a Budget: Think about the costs that come along with holding your event</p>	<p style="text-align: center;"> <u>Space Rental</u> <u>Refreshments</u> <u>Childcare</u> <u>Audio/Visual Needs</u> <u>Printing Costs</u> </p> <p>*The Minnesota Council of Nonprofits has grants of \$250 to offset costs!</p>
<p>Who will moderate your event? Consider individuals who will be perceived as neutral and nonpartisan.</p>	
<p>If you need a timekeeper for your event, who will it be and how will they do it?</p>	
<p>What are the other staffing needs for your event? Do you need to recruit volunteers?</p>	

<p>What are the questions you want asked and how will you ask them?</p>	
<p>What will be the rules of your format?</p>	<p><u>Speaking Time</u></p> <p><u>Managing Questions</u></p> <p><u>Allowing Candidate Literature, T-shirts, etc.</u></p> <p><u>Groundrules on Nonpartisanship</u></p>
<p>Timeline for the day of the event. Think about set-up, meet 'n' greet, welcome, and clean-up</p>	<pre> graph LR A[1 hr before] --- B[1/2 hr before] B --- C[Event Kick-Off (set time)] C --- D[After the Event] </pre>
<p>How can MPP assist you in your candidate event?</p>	