

Former campaign hacks
reveal best tactics for
**wielding your local
Indivisible power**



INDIVISIBLE ENDORSEMENTS

A PRACTICAL GUIDE *for*
ENDORISING IN PRIMARIES AND BEYOND

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INTRODUCTION—2018 IS COMING

The original Indivisible Guide focused on how to act locally to influence your elected officials. This guide focuses on how to act locally to replace them.

What we wrote in the Guide nearly a year ago remains true today: Trump's agenda doesn't depend on Trump, but rather on whether your elected officials go along with him or resist. Indivisible groups in every congressional district in the country have taken that to heart.

Your local application of constituent power has, incredibly, altered the national political landscape. Ten months in, Trump's plutocratic, white supremacist cabal has yet to enact a single significant piece of legislation. Instead, a ragtag bunch of volunteers just doing their civic duty on their home turf have won a breathtaking series of victories.

But you know these victories aren't final. To stop the Trump agenda of racism, authoritarianism, and plutocracy, we have to take back power.

The authors of this guide are political staffers who have worked on campaigns all over the country. But you don't have to be a campaign veteran to know that we're all at risk as long as Trump's forces control Congress and the states. To make our victories against this regime permanent, we have two electoral goals:

First, we must retake the reins of power. It matters who controls Congress, state governments, and local institutions. Beating Trump's lackeys is a general election goal, and it's absolutely necessary if we are to stop this Administration from causing further harm.

Second, we need leaders who will not just be anti-Trump, but who will fight every day for progressive values and stand indivisible with us all. That means we have to care about who wins not just the general election, but primary elections as well.

We know elections—especially primaries!—can be scary for many groups. We also know there are best (and worst) practices for engaging in campaigns. This guide demystifies the process a bit, with guidance for local Indivisible groups on how best to engage in both primaries and generals.

2018 is coming. It will be here sooner than you think. Indivisible groups, acting in concert with thousands more around the country, have the potential to help bring about the change we need. We can't wait. Fight on—we will win.



WHO IS THIS DOCUMENT BY AND FOR?

We: Are former political campaign hacks who have worked on local, state, and federal elections.

You: Are an Indivisible group leader or member looking to build your power.

What: This guide aims to demystify the candidate endorsement process, including for (gasp!) primaries.

You: Should use this guide, share it, amend it, make it your own, and get to work.

ENDORSEMENT GUIDE SUMMARY

1: WHY CANDIDATES CARE ABOUT YOUR INDIVISIBLE GROUP

What the campaign wants: people, media, money. Campaigns are focused on one thing: winning. They win by getting votes. They get votes by acquiring and deploying three resources: people, media, and money. Indivisible groups are unique because you are real, locally-based, engaged constituents, which is rare. Candidates seek out Indivisible group support because they recognize it will bring people, media, or money.

CH 2: WHAT MAKES YOUR GROUP'S ENDORSEMENT POWERFUL

Powerful endorsements are not just empty statements. Powerful endorsements pack a punch. Specifically, these endorsements are three things:

1. A public, definitive, stated preference.
2. A commitment of tangible support.
3. A distillation of your group's values.

Powerful endorsements grow your group's power while influencing the debate (and potentially even getting your pick elected!).

CH 3: WHY YOUR GROUP SHOULD CONSIDER PRIMARY ENDORSEMENTS

Primaries are a critical part of the democratic process. They can be done wrong, and they can be done right. A key part of getting involved in elections is deciding if your group will get involved in primaries. This chapter walks through why primaries matter, how to decide if you'll get involved, and best practices to ensure the process strengthens your group—and the ultimate nominee—while actively promoting progressive values. It can be done!

CH 4: FACTORS TO CONSIDER WHEN ENDORSING A CANDIDATE

Policies and values, community representation, and (maybe) viability. What do you care about? Who is the candidate? And, how strong a candidate are they? This chapter walks through some common ways to evaluate candidates as your group considers whether to endorse.

CH 5: HOW TO MAKE AN ENDORSEMENT

Step-by-step advice on how to endorse and when. We take you from initial candidate conversations, all the way through the decision-making process and finally, the endorsement itself. And we walk through common pitfalls organizations run into when making these important statements of position and value.

PLEASE NOTE: *How you engage in elections depends a lot on your group's organizational status. This guide is intended for unincorporated local groups and those spending money under 501(c)(4) tax rules—independently, or through fundraising tools we plan to offer as a 501(c)(4) organization ourselves. We don't recommend you incorporate as a 501(c)(3); 501(c)(3) organizations have serious limitations on their ability to participate in elections.*

CHAPTER 1: WHY CANDIDATES CARE ABOUT YOUR INDIVISIBLE GROUP

Campaigns exist to win. To do this, they mobilize all the resources at their disposal to get their supporters out to vote. Whether the candidate is a seasoned campaign professional running for her second term as governor or a first-timer looking at challenging the incumbent in a local school board race, every campaign relies on the same basic tools and building blocks for success. This chapter explains what your local candidate's campaign HQ is thinking, and how your Indivisible group factors into their thinking.

WHAT THE CAMPAIGN WANTS

Campaigns win by mobilizing people, media, and money. The specific tactics that campaigns use for fundraising, communications, and volunteer coordination will vary depending on the circumstances of the campaign and the campaign manager's personal style. But, when coupled with messaging, these three elements are the foundation of every campaign.

- » **People:** When you get right down to it, people are the most important electoral resource. People vote themselves, and are crucial to turning out other voters. They phonebank, canvass, staff campaign offices, recruit volunteers, build word-of-mouth excitement, orchestrate people- and media-attracting events, and donate. Pretty much anyone who's worked a campaign will tell you that at the end of the day, the single most valuable resource is an engaged, supportive constituency.
- » **Media:** Media is all about getting name recognition and a favorable image of the candidate out to voters. The average congressional district has about 700,000 people, and many senators represent millions of constituents. The quickest way to reach the most voters is through media exposure, both "earned media" and "paid media." Campaign ads are one of the better-known forms of media. We've all seen them. They range from inspiring to corny to downright despicable.

In addition to this "paid media," or advertising, campaigns also seek "earned" media. Earned media is free media coverage of the candidate speaking at events, taking a stand on some policy issue, or giving interviews to the press. Candidates are relentless in seeking out earned media and extremely careful about crafting their image through these opportunities. Spoiler alert: local Indivisible groups are great at getting earned media, which can dramatically impact an election.

- » **Money:** Like it or not (we don't), money in politics is a reality. The [average winning campaign](#) for the House of Representatives costs \$1.3 million. The average Senate race is \$10.4 million! Candidates (and incumbent elected officials) spend a TON of their time raising money so that they can afford to actually run their campaign.

You can tell a lot about a candidate from where they get their money. Some campaigns are largely fueled by small dollar donations. Most candidates spend literally hours every day cold-calling rich people and asking for money. Often campaigns rely on Political Action Committees (PACs) that represent corporations or issue-advocacy groups. For federal election candidates, you can find out who butters their bread at [Open Secrets](#)—just search for the candidate's name to find past and current lists of donors.



DIFFERENT CAMPAIGNS, DIFFERENT MINDSETS.

Campaign professionals are used to working across a range of different types of races. Some of these differences will be familiar to many voters: elections can be statewide, like races for governor or senator, or confined to a single geographic district. They can be federal, where the winner moves out of state to represent their constituents in Washington, D.C., or take place on a state or local level.

Just as important as whether a race is state or local is what type of election the candidate is running in. There are a few key types of elections:

- » **Primary elections with an incumbent** are elections in which a new candidate is challenging a member of their own party who currently holds office. Incumbents often build up large campaign bank accounts and endorsements to scare away primary challengers. But they know that turnout in primaries is much lower than in other elections, and so results are more unpredictable than general elections.
- » **Primary elections with an open seat** are primary elections without an incumbent. These primaries happen when an incumbent is term-limited or chooses to resign, leaving a seat open, or in cases where one party will be challenging an incumbent of the other party in the general election. While front-runners often emerge, open primaries are often real free-for-alls, attracting multiple candidates. For this reason, and because turnout is usually low, no race is more unpredictable than an open primary.
- » **General elections with an incumbent** are elections in which a candidate challenges a current office holder from another political party. Typically, this will involve Democrats challenging Republicans or Republicans challenging Democrats, but general elections can also include independents, as well as Libertarians and Green Party members. Generally, candidates will move to the center politically in the general, but every state and district are different. [Cook Political Report](#) is a great resource to take the political temperature of your state or district.
- » **Open general elections** are elections without an incumbent. In these cases, both major parties usually field candidates that they've chosen through a primary election. These candidates then face each other, along with any candidates from other parties, in the general election. General elections are typically, but not always, held in early November.

WHY CAMPAIGNS CARE ABOUT YOUR INDIVISIBLE GROUP

Indivisible groups are a legitimate source of political power. While money flows into campaigns from just about every direction, independent groups of locally-based, engaged constituents are incredibly valuable in American politics. Indivisible groups around the country have demonstrated that you are committed to progressive action and are good at bringing people together and making stuff happen. These factors will make your Indivisible group a prime target for campaigns hoping to turn your success into success for their candidates.

Your Indivisible group's support is valuable. Campaigns seek an Indivisible group's support—either informally or through an official endorsement—because it will help them get money, media, or people.

Because of the value of your group's endorsement, you should think carefully about how to engage with candidates, how to make these decisions, and what type of campaign support you can commit to providing if you decide to support a candidate. Read on—that's the subject of the next few chapters.

CHAPTER 2: WHAT MAKES YOUR GROUP'S ENDORSEMENT POWERFUL?

Powerful endorsements are more than empty statements. An endorsement is a formal way of signaling and mobilizing your Indivisible group's support for a candidate. Powerful endorsements are real commitments that promise concrete actions by your group and members.

This chapter goes deeper on what a candidate endorsement is, what the campaign gets from your endorsements, and what your Indivisible group can achieve by using endorsements.

THE THREE FEATURES OF A POWERFUL GROUP ENDORSEMENT

Candidates receive endorsements from a wide variety of sources—community organizations, grasstops, media and entertainment personalities, labor unions, business leaders, and even other candidates. So what exactly does an endorsement mean?

A powerful endorsement is three things:

1. **A distillation of your group's values.** Endorsements aren't just about the candidate—they're also about what your Indivisible group stands for. A powerful endorsement requires that your group clarify your own values, and evaluate how those values line up with different candidates and campaigns.
2. **A public, definitive, stated preference.** Endorsements are a stated preference for one candidate over another. It means despite whatever disagreements you may have, you prefer your candidate over anyone else in the race. This does not mean that your Indivisible group must agree 100 percent with the endorsed candidate, but it does mean you must stand behind your candidate during the election. Barring extenuating circumstances, you won't want to withdraw an endorsement during a campaign or tell people a reason not to vote for your endorsed candidate. If you endorse a candidate, and then break with the candidate later, you'll find your endorsements are less meaningful in the future (unless of course you break the endorsement because the candidate did something particularly stupid or out of line with your stated values or in conflict with their positions they pledged to your group in the candidate questionnaire).
3. **A commitment of tangible support.** Powerful endorsements come with a commitment from your group and members to actually do something meaningful in support of the candidate. An endorsement has to be more than just a statement of preference to have real impact. If your endorsement is just words on a page, you'll quickly find that nobody cares about it. Indivisible has shown that our power is in our people. When it comes to Indivisible groups, support doesn't mean money here—in fact, the campaigns are going to care far more about your people power, and groups' ability to generate media exposure.

SIX BIG THINGS YOUR GROUP ACHIEVES BY ENDORSING CANDIDATES

By flexing your political power through endorsements, you're developing and growing a muscle. Affirmatively getting behind candidates has several benefits for your Indivisible group and, well, the basic functioning of our democracy (thanks!). These include:

1. **Creating meaningful pressure for your preferred policies and values.** By endorsing, you're rewarding candidates who share your values and policies—and creating incentives for the ones who don't to change their approach. And elections aren't just about the person on the ballot today; they're about everyone who holds elected office. When elected officials

know they are going to be challenged electorally, they alter their approach to better respond to that challenge. If you want a non-responsive elected to change her position on an issue or hold a town hall, a great way to achieve that is by very publicly announcing that you'll *only* support candidates that meet your standards on those fronts.

2. **Building stronger relationships with electeds.** You know who electeds are eager to meet with and work with? People who engaged in mobilizing around their last election. If your group endorsed a candidate in the general election, they'll view your relationship as one to be nurtured. This is true even if you endorsed someone else in the primary—if you wound up endorsing them in the general and showed up in support at the end of the day, you'll have a stronger relationship with them when they're in office. This relationship is important not because of your group's proximity to power, but because it will make it easier to hold elected officials accountable to your values, as well, they want to make sure you show up for the next election.
3. **Energizing your members and building your group's shared purpose.** Engaging as a group in an election gives your members a goal to work towards together that you're excited about, and interesting new challenges to take on. On the flip side, if you don't get involved in elections, it's possible that a lot of your members will end up doing so on their own anyways—diverting energy outside of your group.
4. **Contributing to the functioning of democracy.** Look, democracy is all about choices. If 95% of races with incumbents only give voters a single choice, it's not much of a democracy. Give people an actual debate, an actual discussion, an actual say in who their elected officials are, and you'll be strengthening democracy. When you endorse candidates, you help foster that debate.
5. **Having fun.** Campaigns are fun! They're a great way to meet new people, take on new challenges, and learn new skills. After months of advocating for your electeds to listen to you, you get to wield electoral power and *make* them listen. It's a blast.
6. **Possibly winning.** Well duh, right? But there's a reason this is at the bottom of the list. Winning is great, but it's far from the only reason for your Indivisible group to get engaged. Still, your group's endorsement very well might be what puts your candidate over the top. Especially in local elections and primaries—and even in statewide elections in some cases—small groups of people can absolutely alter the outcome of the race. Endorsements make you a player, and you might put somebody in office. That's pretty cool.

WHAT YOUR GROUP'S ENDORSEMENT OFFERS A CAMPAIGN

As discussed above, campaigns aren't just being nice when they ask for your endorsement. They want your help getting people, media and money. So when considering an endorsement, it's important to recognize your strengths in these areas. We'll take these in the order of strongest to least strong.

Indivisible Resource #1: People. Indivisible is a movement of people, so the first and most important thing you're going to be able to contribute with an endorsement is people power. An endorsement should signal that people in your group are excited to show up and work to support the candidate.

This is crucial because campaigns depend on motivated volunteers throughout the campaign cycle—from before the Primary to General Election Day.

People power can come in direct volunteer support for the campaign or as independent volunteer efforts run by your group. These activities may include:

- » Voter registration drives
- » Knocking on doors, phone banking, and other voter outreach
- » Bird-dogging opponents
- » Election protection and drives to sign up as poll workers
- » Get Out The Vote (GOTV) efforts, like training other volunteers and driving voters to the polls



COORDINATING WITH CANDIDATES

In order to get the most of your people power, candidates and their campaigns may want to coordinate with your group on planning volunteer activities like canvassing or phone-banking. That might be a good idea, but it imposes serious restrictions on your group: groups often aren't allowed to spend money on activities that are coordinated with a candidate for federal office, and once you learn non-public information about a candidate's strategy, you may not be permitted to run an independent program in that election. It's important to think through your plan at the beginning: will you work with other Indivisible groups, using Indivisible-provided tools and/or fundraising for election activities, or do the members of your group want to volunteer directly with a campaign, as individuals?

Indivisible resource #2: Media. In general, campaigns don't need national press to be successful—they need favorable local press coverage. Indivisible groups have been absolute experts at getting local press coverage of their actions (just [check out these local clips](#)). Your group's endorsement absolutely should come with media support. These media activities may include:

- » Press release announcing the endorsement
- » Hosting for rallies, forums, parties, and other media-luring events
- » [Letters to the Editor](#) or op-eds to increase the candidate's name recognition
- » Building grassroots buzz through social media

Indivisible Resource #3: Money. Let's be honest, Indivisible's competitive advantage is never going to be money. We're not billionaires and we're not big money interest groups—we're just never going to be able to compete on that level, nor would we want to. But there are still ways to contribute productively to campaigns. Good candidates like to trumpet their small dollar donations. It's a way not just to raise funds, but also to signal to the outside world that they are backed by a genuine base of ordinary engaged citizens. Campaigns will often report the *number* of donors, not just the total amount raised—that's why campaigns sometimes ask you and other individual Indivisible supporters for just a couple of dollars.

We'll have more guides in upcoming months about getting involved in the ways outlined, but in the meantime, you can reach out to field@indivisible.org to get connected with an Indivisible Organizer.



A NOTE ON MONEY

Note that there are legal considerations to make when it comes to fundraising and spending money on political activities, and fundraising election laws on the local and state level vary from place to place. Your group may not want to risk the legal and financial headaches that come with directly donating to a candidate as a group or spending money on a campaign, but you can always encourage your group members to consider a voluntary donation or to volunteer their time to a campaign.

CHAPTER 3: WHY YOUR INDIVISIBLE GROUP SHOULD CONSIDER ENDORSING IN PRIMARIES

It's common to worry about negative effects of primaries, like division or nastiness. But the reality is that primaries play a critical role in democracy—and they're as healthy and constructive as we make them. In a good primary, there's a robust campaign and a real exchange of ideas, allowing for the best candidate to carry the nomination into the general election. And in a healthy primary, everyone unites behind the nominee at the end of the day. This chapter is about how your group can make that happen.

FOUR THINGS PRIMARIES ARE GOOD FOR

First, let's talk about the role that primaries play in our democracy. Primaries accomplish the following things:

1. **Generate a healthy debate of ideas.** Without primaries, the only debate in the public square will come during the general election. And let's be honest—after decades of racist and misogynistic fear-mongering, one party is now fully controlled by a far-right, white supremacist cabal. This means you're not always going to get a very good debate about policy in the general election.

The primary creates a space for candidates to talk about who they are, compare their visions for the country, and debate different policy ideas and priorities. If you want to talk about Medicare for All, or how best to stop climate change, or reforming criminal justice laws, these types of debates usually happen in the primary. And if you want to ensure the candidates who ultimately take power share your values—well, that's decided by who wins the primary. A general rule of thumb is that candidates tack to the center during a general election. So if you wait until the general election to seriously engage with candidates about their policies, you'll have less of a chance to influence them.



HELP! MY PROGRESSIVE CANDIDATE IS BECOMING A CONSERVATIVE IN THE GENERAL!

In many states and districts, strong progressive candidates tack to the center during the general election to try to win over independent voters. While messaging may change between a primary and general, you don't want a candidate who abandons her principles as soon as the primary is over. That's why primary elections are so important for getting candidates on the record on the issues that matter most to you, before they feel the need to shift to the right during the general.

2. **Strengthen the general election candidate.** Every election cycle, at least a few candidates who look great on paper turn out to be duds. The primary process ideally eliminates these folks before they lose in the general. Competitive primaries work as a “stress test,” forcing candidates and campaigns to seriously consider what it will take to win, uncovering anything problematic in a candidate's background, and confirming that a candidate really has what it takes. And because a competitive primary forces candidates to start earlier and work harder, winning nominees tend to be stronger, more experienced candidates by the time they get to the general election.

This is [borne out](#) by the [evidence](#), which suggests that having a greater number of candidates in a primary race correlates with a stronger eventual party candidate.

3. **Build momentum for the general.** Political campaigns aren't born with a fixed amount of money, volunteer hours, or overall enthusiasm—for good campaigns, these are renewable resources.

Primaries are an opportunity to energize people and build a strong campaign earlier in the year. Voters will have more time to get to know the candidates, learn their platforms, and (hopefully) interact with them throughout the primary process. Starting this ramp-up of voter enthusiasm and investment in an election early in the year will help ensure progressives are ready to go for the general election.

4. **Ensure a more responsive elected official.** There's a reason why Indivisible groups' advocacy gets results: your electeds know that they will have to face you eventually when they run for reelection. And the risk of a primary tends to keep electeds—even the ones in very safe seats—on their toes and makes them more responsive to constituents.

The first rule of politics is that elected officials care about re-election. That means that they care about your advocacy to the extent they think it will impact their re-election chances. If your elected representative has been genuinely non-responsive, or out of line with your values, considering endorsing a primary challenger shows them that there are consequences of failing to stand indivisible with you.



THE TEA PARTY

For an example of how an active, independent movement can change the face of American politics, look no farther than the Tea Party. Since 2010, Republicans in Congress have been very attuned to the risk of primary challenges from the right. That year, establishment politicians faced challenges from upstart Tea Party candidates in both open primaries and primaries with an incumbent Republican. The Republican party had been moving to the right for decades, but the Tea Party accelerated that rightward shift.

We don't agree with their politics—and some of their primary challenges were short-sighted and not very strategic. But there's no denying that the Tea Party was successful at dramatically influencing the Republican party.

THREE KEY PRINCIPLES FOR A PRODUCTIVE PRIMARY

You can engage in a primary and fail to have the impact you want. There are three key rules to follow to productively engage in competitive primaries as an Indivisible group.

1. **No personal attacks.** Primaries work when they focus on ideas and policies, not personalities. If your group's effort to talk about a primary devolves into personal attacks on individual candidates (or each other), that's a warning sign you may need to pause and reset. If your group isn't sure if you're ready to endorse, our Organizing team is always on hand to talk it through (reach out by emailing field@indivisible.org).



HELP! MY GROUP IS STUCK IN 2016!”

If you listen to the news media, you might get the impression that 2018 will be a rematch between Hillary and Bernie. We know that that’s a real fear for some of groups, especially since Indivisible groups are composed of members who supported different candidates in the 2016 primary.

The truth is, no matter who you supported in 2016, all Indivisibles agree on core objectives: opposing the Trump agenda and embracing progressive values. Reliving fights from 2016 isn’t just unhelpful, it’s actively harmful to our movement. If your endorsement conversation has turned into an argument about the 2016 primary, something’s gone wrong. If you find yourself relitigating past elections, pause and reset by going back to look at the candidates’ policies and values.

2. **Have clear, transparent rules about how you’ll make decisions.** One of the most common ways for primaries to get messy is if people feel they weren’t heard or the rules weren’t fair. You can avoid this by having a clear, transparent process (see next section for guidelines on this). And one key part of this process is ensuring that...
3. **Everyone commits to supporting the nominee in the general election.** Emotions in primaries can run high. People get attached to their candidate and reasonable Indivisible members may disagree. But at the end of the day, we’re all here for a reason: we’re taking our country back from the plutocratic, white-supremacist forces currently in control. That *requires* winning general elections, and that means supporting the eventual nominee, even if they weren’t your first choice.

To help unify your group and continue to mobilize your group, you might want to consider hosting an Indivisible rally on the day **after** the primary election to throw your full support behind the general election nominee, and start gearing up for November. You can even ask that your endorsed nominee commit to attending the rally, whether they won or lost the primary.

Reiterating this shared mission from the beginning—and committing to endorse the winner of the primary as part of your decision-making process—helps to reduce the risk that a primary gets divisive and turns people off. This is how we continue standing Indivisible after primaries. This is how we win.



MYTH VS. FACT IN THE PRIMARY SYSTEM

Myth	Fact
Primaries weaken candidates ahead of the general election.	Reams of evidence show that primaries actually result in candidates who are stronger in the general election. Primaries are a chance for candidates to build their campaign, practice making their case, and engage substantively on the issues that matter to progressives -- and that makes them stronger.
Can't we all just agree to fight Trump and the white supremacist uber-conservatives?	Yes! There's no conflict between fighting the Trump Right and engaging in primaries. At the end of the day, a general election between a Trump supporter and a Democrat you have some quibbles with will be a no-brainer. It's crucial that all Indivisibles, whether or not they engage in primaries, recognize that ultimate goal.
Pushing a candidate too far to the left during the primary can hurt their chances in the general.	Primaries are about ensuring your Members of Congress are responsive to you, their constituents. If a candidate makes changes to their policy platform during a primary, they're being responsive to the wishes of their community.
Primaries burn campaign resources ahead of the general election.	There is no finite set of resources for a campaign. In fact, hard-fought primaries can elevate candidate name recognition, spur interest in a race, and lead to an influx of key small-dollar donations. Plus, they'll have a strong group of trained volunteers ready to talk to voters in the general.
Considering a primary endorsement will create divisions within your group that will weaken your organization.	Primaries can be emotional for groups and individuals—and they're not right for everyone. But as long as the primary endorsement process is fair, and your group commits to supporting whoever the winner is in the general, the process can leave your group stronger.
Primaries hurt the party.	Primary challenges certainly create headaches for the leaders of the party—any challenge to power does that. But they also bring new blood into the system and prevent parties from growing stale. And primaries for open seats are a golden opportunity to debate new ideas and hear from new voices. If we want a strong Democratic Party, primaries are a necessary part of the process.

CHAPTER 4: FACTORS TO CONSIDER WHEN ENDORSING A CANDIDATE

At the end of the day, you're endorsing a candidate because you think they're the best person to hold political office. But making that assessment involves thinking through a lot of factors about who the candidate is, what they stand for, and what their chances are. This chapter reviews key factors your Indivisible group will want to consider.

VALUES AND POLICIES

Candidates should share your values and care about the same bold policies that your group does. What issues does your candidate focus on? What policies do they support? Do they share your values? In order to answer these questions, you may need to define for your own group what's most important. No one knows your community or your group better than you do, and no one can better assess a candidate than you can. By clearly stating your values, your preferred policies, and what you're looking for in an elected official, you can help elevate your issues, shape the race and push the candidates to reflect your values.



HOW TO DEFINE YOUR VALUES—INDIVISIBLE OKLAHOMA

Indivisible Oklahoma was first formed in November 2016 as “Not My President - Oklahoma,” and evolved into an Indivisible group in January 2017. Today, the group has over 10,000 members in more than 50 affiliates. One of the group's primary objectives was defining what mattered to them: which issues they would engage on, and which might be outside their purview.

Together, the organization drafted a set of 15 key principles. As founder Beverly Tuberville writes, “We truly believe that our mission is not to oppose Trump. However, it is to oppose his agenda, an agenda that existed long before Trump and will exist long after.” With that in mind, the group created its primary organizing principles. Defining your values, as Indivisible Oklahoma did, will make it easier for you to determine where candidates line up with your group, and where they may fall short.

REPRESENTATION MATTERS

Public policy is better when the people at the table reflect the diverse range of backgrounds and experiences of our nation. Americans all have life experiences that impact their understanding of politics and policy, and every elected official—including people of color, women, religious minorities, and disabled and LGBTQ+ Americans—brings their personal background to the table.

Today, straight white men make up the vast majority of the U.S. House and Senate. This is a big problem, but it's not new and it's not an accident. Our government was originally structured to explicitly exclude participation from non-white and non-male Americans. Decisions are made by the people in the room, and for generations that room was intentionally kept white and male.

This is bad for democracy, and a progressive movement working to represent the people must aim to do better. Even among those who hold progressive beliefs, [unconscious biases](#) can still impact our perceptions of women and people of color who run for office. Unfortunately, well-meaning attempts to “not see gender” or “not see race” can still wind up putting candidates who are not white men at a disadvantage. We have to consciously overturn the patterns of discrimination that have historically kept women, people of color, and other marginalized groups out of political power.

When contemplating making an endorsement, we encourage you to recognize the importance of seeking out and supporting candidates from underrepresented groups. A candidate's race or gender will not be the only factor in choosing whether or not to endorse, but we cannot ignore these factors if we want politicians who truly reflect our electorate and movement.

VIABILITY—BUT ONLY TO A CERTAIN EXTENT

Viability is how we describe a candidate's chances of winning. To be blunt, "viability" is a buzzword for political hacks, and it's usually used to describe why some upstart candidate has no chance. The thing is, us hacks are often flat wrong. Remember when Trump was considered totally not viable? Yeah. This is why we include the "viability" factor with some strong caveats.

In reality, the importance you place on viability depends on the local context and your Indivisible group's goals. If you're in a swing district with an open seat, there may be a dozen candidates in the primary, some much stronger than others. Understanding who's got a strong foundation can help you decide where to focus attention. On the other hand, if you've got a front-runner who's the overwhelming favorite but consistently votes against progressive values, you may want to endorse a longshot progressive candidate—even if they don't have much of a chance of winning the primary.

Candidates anointed by a party—both those recruited to run and incumbents—aim to give the impression of invulnerability. This is a smart tactic. But no candidate is actually invulnerable. Even the most entrenched establishment politicians have vulnerabilities, and can be defeated by a great challenger with a good vision, strong fundraising, and an excellent campaign strategy.

Typical component parts of viability:

- » **Money:** The lazy political hack will look at money and little else to determine viability. There are two main factors to consider here: the candidate's overall financial strength and the percentage of donations that come from small dollar donors. For financial strength, what's most important is not exact dollar amounts but rather how each candidate is doing in comparison to the others. You'll want to look at current Cash on Hand to get a sense of campaigns' books. For federal elections, you can find candidate fundraising information on the Federal Election Commission's (FEC) [website](#). Federal candidates have to report their fundraising totals every quarter (this is why you get a barrage of fundraising emails in the final days of before a quarter ends—they're trying to goose their stats). For state elections (for governor, attorney general, state legislators, etc.), the information will be available on a state website—usually your state's Secretary of State or Department of Elections page.

Just as important as overall financial health is the percentage of donations coming from small dollar donors. As an organization, we believe that money in politics is a big problem and dilutes the voices of the American people. It is absolutely worth giving extra consideration to candidates with a strong record of small dollar donations. People with the wealthiest friends or an ability to self-fund shouldn't be able to buy their way into a seat. The FEC website does list small dollar vs. high dollar donations, but [OpenSecrets](#) does a particularly good job of laying out this information in a clear manner. If a candidate does have a lot of big dollar donations, it's also helpful to check out where that money is coming from: industries and companies who don't represent progressive values or good government and labor groups?

- » **Polling:** Polls seem objective—it’s just numbers!—but the reality is that they move up and down significantly over the course of a race, and different polls may show very different results. Polling can be a tricky business, and like anything in politics, candidates will try to use polls to their advantage. Upstart candidates will often release sketchy polls to establish that they have a chance, incumbents may trumpet their own popularity polls to show just how invulnerable they are.

In some races (particularly statewide races, like the Governor’s race or a Senate race), there will be frequent public polling. In others, including some House races, Mayor’s races, City or County Council elections, and State Senate or Delegate races, polling may be harder to come by. Some well-respected resources for both polls and general race monitoring include: [Daily Kos Election Report](#), and [Cook Political Report](#). You can sign up on the Daily Kos website to receive their daily election updates, which give a great nationwide look at key races. Cook Political keeps a tracker on races for the US House of Representatives, Senate, and Governor, and updates once a week as we get closer to election day

- » **Other Endorsements (including other Indivisibles!):** As you head into making your own endorsement decision, it’s helpful to be aware of the landscape of endorsements for all candidates in the race. Endorsements that take into account other progressive movement partners will be even stronger for this collaboration.

It’s also very important to consider how other Indivisible groups are approaching making an endorsement in the same race. There are at least two Indivisible groups (and sometimes dozens) in every congressional district, and your endorsement will be even more powerful if you coordinate on a fair process and end up uniting around the same candidate!

CHAPTER 5: HOW TO MAKE AN ENDORSEMENT

Chapters 1 and 2 discussed why campaigns care about your Indivisible group endorsement and what a powerful endorsement entails. Chapter 3 focused on the when—whether you should get involved early in primaries. Chapter 4 looked at what factors you should consider when thinking about candidates and campaigns.

This final chapter discusses how your Indivisible group can go about making that endorsement: from getting to know a candidate to issuing your endorsement statement, you'll learn what to do—and what not to do—when your group wants to throw its hat into the electoral ring.

Given this chapter's length, we wanted to give you some clear landmarks for where we'll be going over the next few pages. Below is a quick overview of what this chapter takes a look at.

- » Three first steps to set up your endorsement process
 - » Create a fair process
 - » Determine in which races you're going to endorse in 2018
 - » Team up with other Indivisible groups to stand Indivisible
- » Create a Timeline
- » How to Interact With Candidates
 - » Do Your Candidate Research
 - » Introduce Your Group to the Candidates
 - » Gather More Information
- » How to Make the Endorsement
 - » Hold an In-Person Meeting
 - » Set up an Online Vote
- » Make the Announcement
- » Now the Fun Starts!
- » Sample Endorsement Process

This chapter is the longest for a reason: Understanding these steps and establishing a formal process around endorsements is the most effective way to get involved in a race while maintaining the integrity of your group. Our Organizing team would be happy to talk through your process with you—reach us by emailing field@indivisible.org.

THREE FIRST STEPS FOR SETTING UP YOUR GROUP'S ENDORSEMENT PROCESS

Have a clear, fair process makes everything go smoother. In the weeks or months since your Indivisible group was established, you have had to make a number of internal decisions about how to operate. You've had to prioritize policy issues, choose which tactics to use to engage with your elected officials, and balance competing perspectives within your group itself. The fact that you are now looking to weigh in on politics, and contemplating an endorsement, is testament to the fact that you've learned to work together as an organization.

As your group wades into electoral work, you'll need a similar fair, transparent process like you've used for legislative advocacy. Primaries are a healthy part of the political process, but they can still get heated. Most group members will be OK if their preferred candidate isn't chosen, but they won't be OK if they feel like the process was unfair. That's why it's vital that you decide on rules and internal policies for endorsements that are transparent, fair, and agreed upon ahead of time. Here are four steps to get started:

Step 1: Create a fair process. Your internal processes should be open, transparent, and inclusive. Ensuring that everyone feels heard and respected throughout the decision-making process will make it that much easier for your group to hit the ground running following any endorsement you choose to make. Here are key questions to answer when setting up your internal processes for endorsement (See Chapter 5: How to Make an Endorsement for more information):

- » Who makes the decision on process? In general, the person(s) currently running your group are the people best suited to run this process and be the point person for the decision. The group leader may delegate this role if there is another person suitable within the group, but be mindful that the point person may wind up spending a lot of time defending and clarifying process as well as defending the eventual decision. The group leader, or their designated representative, will roll out the process, administer the process, determine the decision based on the vote, and announce the decision internally and externally.
- » Who can vote in your group? We would recommend that voting members be limited to people actively engaged with the group. Minimally, these are folks regularly attending offline meetings and events, but can also include people on other internal lists. You will have maximum buy-in from group members if you bring in the widest pool of people possible. That said, we err strongly on the side of not making voting open to publicly accessible venues like a public Facebook page, as these venues are susceptible to interference by candidates, their proxies, and trolls.
- » How will you vote? Voting systems matter! Just ask Putin. Seriously, the way you vote can determine who votes and whether or not your members feel the process was fair. Will you vote in person or online? Will the vote be anonymous or public?
- » What level of consensus do you need? We've been hearing from a number of groups that they're wary of engaging in a potentially contentious vote. One way to avoid that is to establish a required level of consensus your group agrees is fair from the get-go. What is your voting system (i.e., 2/3 majority, plurality, consensus, etc.)?

- » What happens to your group members who disagree? Except in the rare case where a group managed to achieve true consensus on a candidate, there will be some members of your group who would have preferred another outcome. We would recommend your group determine a plan for this in advance. One solution can be to clarify in advance that though the group will put their endorsement behind a candidate, individual members are welcome to volunteer in their personal time with any candidate. However, it's critical that all group members agree to support the ultimate decision in their capacity as a member of the group—leaving the debate and hard feelings in the deliberation space.
- » How will you roll the process out to group members? Last process question! You've determined all other part of the process. Now you need to take the time to let your group members know that you are engaging in the primary, why that work is important, and what your structure and process will look like. Not everyone checks their email or attends the meetings, so to the extent you can be vocal about all of this in multiple places it's important to do so.

Step 2: Determine in which races you're going to endorse in 2018. Your thorough, fair, transparent internal process may reveal deep disagreements about the candidates in a given race. After the voting is done, your group may choose to stay out of an election altogether. That's fine! That's the whole point of a process. The important thing is that this an affirmative decision your group makes using the fair, transparent process that you've all agreed upon. As your group considers whether or not to engage in an election, keep these two points in mind:

- » Engaging in elections isn't an all-or-nothing choice. Your group's decision may be different for primaries than it is for the general election, and it may be different for local races than it is for federal races. You may decide to endorse in your congressional election primary, only get involved involved in the district attorney general election, and sit out the school board elections entirely. This is all reasonable, and should be determined by your group's process, not by anyone else.
- » Your power, while mighty, is not limitless. There could be anywhere from a handful to dozens of races taking place in your area in any given election year. You likely won't have the time or desire to engage in every single race. Before you begin the full endorsement process, decide how much capacity your group has. Endorse only when you're confident you can commit real resources to the candidates you pick. This will likely limit the number of races you can engage in, but that's OK! Choosing to begin the endorsement process in a race doesn't necessarily mean you will wind up making an endorsement. But prioritizing your top races early in the process—or deciding to stay out of endorsements entirely—is the very first choice you should make.

Step 3: Team up with other Indivisible groups to stand Indivisible. Strength in numbers. The only thing better than endorsement of one Indivisible group is the endorsement of every Indivisible group in the district.

There are an average of 13 Indivisible groups per congressional district, and all of us are still learning how to best coordinate with each other. Indivisible groups across the country have approached coordinating with other groups in a variety of ways—and how Indivisible groups work together on

endorsements will vary quite a bit as well. But we are stronger when we stand Indivisible—and that includes when endorsing candidates! There's strength in numbers and if you choose to endorse together, you can have an even greater impact. It is also important to make sure you're aware from the get-go if multiple groups are planning to come out with conflicting endorsements or messages.

Groups that work together will be more powerful because of it, and groups that endorse competing candidates may end up frustrated that they're butting heads with each other. Here are some things to keep in mind about coordinating:

- » Reach out early. If you're planning to endorse in a race you share with another Indivisible group, it's a good idea to reach out to let other groups know—that way you can see if they have similar plans. It's OK, and expected, that different Indivisible groups may prefer different candidates—we're all independent—but you'll want to know that at the beginning. And if you talk about why you disagree, you may find a way to work through your differences, develop a shared process, and agree to support the same candidate.
- » Consider a joint endorsement. Especially if there is a nearby group or groups you've successfully collaborated with in the past, consider coming together for an endorsement. In this case, you should work together to determine a decision-making process and make sure all group members are up to speed.
- » Be clear on your group's process and values. Remember: before committing to work with another group, it's important to ensure your values and priorities in a candidate are similar. Take the time on the front-end to talk about what you're looking for, work out a process, and make sure the process is transparent for all your group members. If you'd like help connecting to other groups in your area, reach out to field@indivisible.org and an organizer from our team can follow up with you.

Standing Indivisible is especially crucial for races with a national profile. We'll be working to roll out a process for national endorsements that are reflective of our grassroots movement and based on input from all members of Indivisible in early 2018. We'll keep you posted on this - we want to maintain a high level of transparency with groups as we, too, grapple with these critical endorsement decisions at the national level. Stay tuned for more info on how we'll work with your group and others in your area to align on these key races.



WHEN NOT TO MAKE AN ENDORSEMENT

Endorsing is not right for every group. Just as important as recognizing when to make an endorsement is recognizing when NOT to endorse. The prospect of getting to endorse a candidate can be thrilling. Still, it's important to consider why you are endorsing and whether the process is working. If you're not sure if you're ready, you can reach out to field@indivisible.org to discuss further. If you find yourself falling into any of these categories, it means you're not in the right place to endorse:

DON'T MAKE AN EMPTY ENDORSEMENT

Are a lot of people in your group excited to work to support the candidate that you're endorsing? If not, you're not ready to endorse. Endorsements are a promise of hard work to come, and a commitment that your group is in it for the long haul. You don't want to commit your group's time and resources to a candidate you feel, at best, lukewarm about. Only endorse if your group members are enthusiastic about supporting the candidate—in the end, it'll come down to whether they're going to work on the candidate's behalf.

If you endorse just for the sake of endorsing, without enthusiasm from your group members, it could potentially undermine your power in the future. Candidates will be less likely to actively seek your endorsement in future cycles if they can't be sure that you really mean it, and are committed to putting the weight of your organization behind helping get them elected.

DON'T CREATE AN EXCLUSIONARY OR UNFAIR ENDORSEMENT

Endorsement decisions need to be inclusive. Your group members need to feel that the endorsement process was fair, transparent and accessible. If members feel like they were kept out of the process, either through direct exclusion or lack of consideration of special circumstances (transportation accessibility, late night meetings for parents of young children, meetings held in wheelchair-inaccessible buildings, etc.), the endorsement process will leave a sour taste in their mouth.

It is important that your endorsement process reflect your group's progressive vision of inclusion and solidarity. If people feel the process was unfair or exclusionary, the endorsement process could potentially hurt your group. On the other hand, if people feel like the process was thoughtful and fair, they will be far more likely to accept the outcome, even if it leads to their non-preferred candidate.

CREATE A TIMELINE

Endorsements are most meaningful when you leave yourself enough time to have an impact on the election. It's helpful to build a calendar backwards from the election date, and figure out when to take action.

You will want to make your final endorsement four to five months out for general elections and at least two to three months out for primary elections. This means you need to give yourself enough time to reach out to other Indivisibles, conduct candidate research, send questionnaires and pledges, and schedule Q&A sessions prior. You should plan to give yourself at least a month to conduct this research. Candidates have busy schedules, so you will want to get any “asks” into them as soon as you can.

Sample Timeline - General Election

Below is a sample timeline you can use when designing a process for endorsements for a general election. This timeline can be adapted for a primary—just bump it up another 4-6 months. And always remember to check the specific election dates in your state or city—they can vary pretty widely, especially for primaries!

- » April 2018
 - » Week 1: Evaluate what races will be on the ticket in 2018, and determine where your group wants to put your energies in making endorsements. Coordinate with other Indivisibles in the area to see if they are considering making an endorsement in the same races, and whether they want to develop a shared process.
 - » Week 2: Start doing research into candidate policies, teams, values and viability.
 - » Week 3: Write candidate questionnaires and questions for Q&A sessions, if applicable.
 - » Week 4: Reach out to all candidates to schedule Q&A sessions, and find a point of contact to send questionnaires and pledges. Send campaigns questionnaires and pledges, start holding Q&A sessions.
- » May 2018
 - » Week 1: Finish any remaining Q&A sessions. Send around any collected research to all your group members, and consider sharing with other Indivisible groups as well.
 - » Weeks 2 and 3: Allow your group time to review any collected candidate research, Q&A's, and questionnaires.



ENDORSEMENT DOS AND DON'TS

DON'T	DO
<p>Bite off more than you can chew: For many groups, there will be upwards of a dozen races taking place in 2018 that you might want to consider making an endorsement in. It can be tempting to try to weigh in on every single one, but doing so may drain your resources and cause you to burn out early in the election cycle.</p>	<p>Remember that your endorsement is as meaningful as the commitment behind it. Be careful and selective in the races you choose to get involved in, so that you have the time and the energy to devote to each one.</p>
<p>Ignore other local Indivisibles: Your group should make the decision that is best for you and your members, but you should absolutely reach out to other local Indivisibles.</p>	<p>Coordinate with other groups in your area: Your endorsement will be even stronger in instances where you come to the same considered decision as others. Check in with your neighboring groups to see if they are considering making an endorsement, and coordinate whenever you can.</p>
<p>Endorse prematurely: Take time to determine how you will endorse and ensure your group members are on board.</p>	<p>Establish a realistic timeline for endorsement, and ensure you have group buy-in. If your group is not prepared to make a decision, can't decide how to make a decision, or is not invested in any of the candidates, you may not be ready to issue an endorsement this cycle.</p>
<p>Let a single person make the decision: Indivisible groups have been successful because of their people power. Don't dilute that power now by putting the endorsement decision in the hands of a single person.</p>	<p>Create fair and transparent processes for decision making. Make sure you are involving as many group members as is realistically possible in the decision-making process, and that everyone knows how the final decision will be made. Remember the importance of accessibility.</p>
<p>Relitigate fights from 2016: 2018 isn't a rematch of 2016. Don't let your group become mired in old discussions of old elections.</p>	<p>Keep your eye on the prize: Remember to take a step back and focus on the actual candidates and actual issues up in this election.</p>
<p>Slack on candidate research: Endorsements are public and definitive. You don't want to be surprised at the last minute by information you could have found at the outset.</p>	<p>Gather all the facts before you make your decision. Make sure you head into the final decision with all the relevant facts.</p>
<p>Only follow the lead of other organizations: Looking into endorsements by other progressive organizations and grasstops leaders can be an element of your decision process, but should not be the only factor in your decision.</p>	<p>Consider other organizations, but make your own decision: It's helpful to see what other progressive organizations are saying to give context to your own endorsement, but make sure you are leading with your own values.</p>

- » Week 4: Hold a vote on which candidate, if any, to endorse (this can be within your group alone, or in coordination with other local Indivisibles). Alert all group members about the results of the vote. Consider coordinating media statements with other groups as appropriate.
- » June 2018
- » Week 1: Contact campaigns with the results of your endorsement process. Draft press release and begin media outreach on the results of your endorsement.
 - » Week 2: Start gearing up for the general election. Begin planning out how you will work to help get your candidates elected, and get excited for the general election. We will be providing more background on how to get this done in the coming weeks and months.

HOW TO INTERACT WITH CANDIDATES

Alrighty! So your group has done all the tough prep work. You've developed an internal process for endorsements. You've rolled that process out to your whole membership. You decided to explore making an endorsement in a race. And you've reached out to other local Indivisible groups to see if you can coordinate on the endorsement.

So now what? Well now you've actually gotta talk with the candidates in the race! As with the internal process work, this is a simple 3-step process. Here's how: do your research, introduce your group, and gather more information.

1. Do Your Candidate Research

Peek under the hood. Before reaching out directly to candidates or campaigns, you should do some research into the candidate's stated values and policy positions. Determining how well a candidate's stated policy stances match up with your group's values often requires some digging. Here are some go-to resources to review:

- » Candidate websites. Almost every candidate has a section of their campaign website dedicated to "Issues." This is the first place to go to check out where the candidate stands on the issues that matter to you. Keep in mind, a candidate's website is friendly (or sometimes not-so-friendly) propaganda. Everything on there is made to sound good and make the candidate look great. That means that they may be incomplete, gloss over key questions, or not include information on controversial issues or positions.
- » Press coverage. All incumbents will have press coverage of their positions, and many candidates will too if they're not total political newbies. Often candidates will purposefully or accidentally say things to press that they won't put on their website. No need to get fancy in your research—just use [Google News Search](#) and search for the candidate's name (and particular issues if that's of interest).

- » Past votes (for incumbents). Once you've had a chance to look over the information they release publicly, it's worth looking into their past positions. [GovTrack.us](#) has great resources that track current Members of Congress' past votes and positions. Finding this information can be more challenging for state and local level incumbents. [The National Conference of State Legislatures](#) has a bill tracker you can use to find your legislator's position on a specific piece of legislation. For the advanced user, [LexisNexis](#) also has some strong state and local resources.



FLIP-FLOPPER?

An important consideration on policy issues is the extent to which a candidate's views on policy have shifted over the years. Back in 2004, John Kerry was attacked for being a "flip-flopper." In 2012, Joe Biden and Barack Obama both evolved for the better on the issue of marriage equality, becoming champions for the right to marry ahead of that year's election.

Flexibility and a willingness to learn are crucial characteristics for a political candidate. At the same time, consistency of values across a candidate's history is also important.

That's why these kinds of shifts have to be evaluated on a case-by-case basis.

Your group will have to evaluate how much emphasis to place on a candidate's past positions. You don't want to discourage people from evolving and taking on better policy positions by dismissing it as flip-flopping. But if a politician has made a shift, it's important to understand why they made that shift and how they've put it into action in their words, decisions, and voting record if you're going to support them.

When looking at inconsistency in a candidate's past statements, it can be helpful to see if those inconsistencies represent real learning and a willingness to admit mistakes on that candidate's part or if they mainly shift their positions only when it becomes politically convenient. At the end of the day, you should look for candidates who have a record of championing issues most important to YOU.

2. Introduce Your Group to the Candidates

The next step is reaching out to the campaign. On a purely practical level, your group will have to determine who at the campaign to contact. It's usually a good idea to reach out to the press secretary or communications director as a first point of contact, since they are used to dealing with public requests and can forward your contact along to the best person on the campaign team. If your candidate is issuing press releases, their name and contact information will often be on the bottom of the release. That said, depending on how early in the campaign you get in touch, and how big of a race it is, they may or not have a dedicated communications staff. If you can't figure out who to direct your initial query to, almost every campaign will have a "Contact Us" box on their website.

When you get in touch, be sure to come prepared with information about who your group is (mission, size, and focus). Campaigns are wildly overstretched and constantly balancing priorities and emergencies. So they don't have a lot of time to do research. You'll have better luck getting a response if you're clear and concise in establishing why they should pay attention to you and what you want from them.

There are certain ethical and legal factors to consider before approaching candidates. At this stage, you typically won't have decided whether you'll be supporting a candidate through an Independent Expenditure or by coordinating directly with a candidate's campaign. We'll be going into more detail on those options in future guides, but in the meantime, you'll want to leave your options open.

This means you shouldn't receive any information on a campaign's strategy or tactics that isn't publicly available. Stick to the best practices below, and you should be able to avoid potential legal and ethical pitfalls. State and local election law varies from place to place, and is totally different from federal election law (covering congressional elections and other federal offices), so there's a lot to keep track of. It may make sense for your group to consult a lawyer before engaging directly in electoral politics, particularly if you're planning to raise or spend money on the election.

Remember these best practices to follow when approaching candidates.

- » Be Inclusive—You should contact all candidates in a race, even if you're fairly certain from the get-go that their policies won't align with yours. In a primary race, this means you should reach out to all candidates—even perennial “also-rans,” or “stunt candidates.” In the general election, you should absolutely reach out to candidates from both major parties, and you should consider soliciting information from any third party candidates in the race as well.
- » Be Systematic in Your Process—Fairness means approaching every campaign in the same way. If you put together a candidate questionnaire (discussed below), make sure you are sending the same questionnaire to every candidate. If you invite one candidate to speak to your group one-on-one for a Q&A session, you should invite all candidates. It's fine if not all candidates wind up accepting your invitation to fill out a questionnaire or participate in a Q&A—what matters is that you offered all candidates the same opportunities to respond. It's also fine to impose some limitations on candidates you're willing to interact with or consider for endorsement as long as those limitations themselves are policy-related, clearly established, and fairly implemented.
- » Stick to Issues—Interactions with a candidate or a campaign are an opportunity to ask specific questions about the candidate's policies and values. By this point in the endorsement process, you will already have a pretty good handle on the factors that contribute to candidate viability. You'll know how a candidate is polling, how much fundraising money they're bringing in, and what their campaign team looks like. While this is all crucial information for you to have, it is best to focus on policies and values during interviews or on questionnaires. Your group should avoid getting any inside information from the campaign on strategy or tactics, and stay focused on the issues, not the campaign process.

3. Gather More Information

As discussed above, you may likely have more questions about where a candidate stands on the issues than are answered by their website or press coverage. There are several ways you can interact with a candidate or a campaign to get more information on the issues that matter most to you. You can send a campaign a candidate questionnaire, you can ask the candidate to sign a candidate pledge, and you can invite a candidate to participate in a question & answer session.

Send a Candidate Questionnaire. One of the best ways of getting information from a campaign on the issues that matter most to you is to send the campaign a candidate questionnaire. These questionnaires are framed around the issues that matter most to your group. The process of assembling the questionnaire can itself help your group clarify what issues you're most focused on

Keep it Simple! It's important to note again that campaigns are overstretched and don't have a ton of people at the early stages—so one poor staffer (or, in very local races, the candidate themselves) is probably handling all the questions that come in. It's common for campaigns to answer dozens of different questionnaires from different organizations and interest groups, and it's actually a lot of work. That means your odds of getting a response are higher if you minimize extra work they'll have to do: for example, ask 'yes or no' questions—do you support Medicare for all?, etc., instead of asking them to write a paragraph. If multiple groups you're in touch with are sending in questionnaires, it's smart—and reduces the burden on the campaign—to coordinate on a single set of questions.

We've put together a sample opening for your questionnaire below, but your group should feel free to tweak it to best reflect your group's priorities.



SAMPLE QUESTIONNAIRE INTRODUCTION

Indivisible Mos Eisley is a grassroots organization dedicated to holding elected officials accountable at all levels of government. An all-volunteer group of more than X people, we have been working for months to push for responsive representation and political accessibility for all Mos Eisley constituents [or YOUR MISSION STATEMENT].

In preparation for the 2018 midterm elections, Indivisible Mos Eisley has prepared a questionnaire for candidates.

The responses provided to this questionnaire will be used by the group to determine which candidates to support in the upcoming election. Responses will be made available to our members, the national Indivisible organization, as well as the public at large. Completion of the questionnaire does not guarantee support from our group. This group questionnaire is not issued by national Indivisible and any resulting endorsements or statements of support are exclusive to Indivisible Mos Eisley.

Meet the Candidates. Whether or not you're planning to endorse, your group should feel free to find ways to get to know candidates better in person. This can include options like inviting candidates to attend one of your regular meetings, offering to host a special event to meet your members and speak to them one on one, or inviting all the candidates to a forum.

It's important to bear in mind the guiding principles of inclusivity and fairness, particularly when considering whether to invite candidates for a Q&A session. Invite all candidates to present to your group, not just member-favorites, and draft a pre-set slate of starter questions you will ask to all candidates ahead of time. It's also a good idea to set a time limit on each Q&A session to make sure no candidate gets to spend more time with group members than others.

Finally, if you have already hosted these Q&A sessions, you know that weekends are often better for working parents than school nights, and providing a livestream of the event can help group members who may not be able to make it in person. Be sure to consider whether the ways that you're putting events together are making it as easy as possible for your members to be part of the process.

HOW TO MAKE THE ENDORSEMENT

After all group members have had an opportunity to review candidate information, it is time to make a final decision on whether or not to endorse specific candidates. If you've done a good job of setting up a clear process at the beginning, this will be a lot easier.

There are a number of ways your group can go about making its final decision, each with benefits and drawbacks. The most important thing is not the method, but the fact that the process is clear and fair from the beginning.

First, set in place a clear plan for how the votes will be counted. There are a variety of ways your group can vote. Here are a few ideas you can consider:

- » Consensus: All members of a group must be in agreement for an endorsement.
- » 2/3 Majority: The endorsement goes to the candidate who receives greater than 66% of the vote. You may need to vote multiple times to reach this percentage.
- » Plurality: The endorsement goes to the candidate with the most votes regardless of the percentage. This is not recommended.

While full consensus is rarely realistic, we would encourage you to establish a process that requires a very high level of buy-in from your members. We strongly recommend requiring a 2/3 majority to move forward with an endorsement. After all, your endorsements only matter if a lot of people in your group are excited about the candidates you're supporting. You could also require a mere plurality (going with the candidate with the most votes, regardless of what percentage of people voted for her), or a true consensus (where every member needs to agree to endorse). We've found that those options can either engender bad feelings or leave groups immobilized, unable to reach any decision at all. But you know your group best, and what will work best for you.

Also worth considering is what to do if there are more than two candidates competing for your endorsement. In these cases, we would recommend holding two rounds of voting: an initial count, and a runoff election. Hold an initial election with all the candidates. Once the votes are tallied up, hold a runoff election between whichever two candidates received the greatest number of votes. It's in this second election that we would advise requiring a 2/3 majority to move forward with an endorsement.

Once you've determined a voting mechanism, figure out how and when you'll vote. This can be during a regular meeting, online over a specified period of time, or in a meeting called just for this purpose. If this is likely to be a contentious vote, making voting anonymous (online or some other manner) can be really helpful in keeping the peace.

Finally, if you're taking a vote on a primary endorsement, we strongly recommend asking everyone who is participating in the process to commit in good faith to support the eventual nominee. This is an important time to remind people of what's ultimately at stake, and why it's important that no matter who wins the primary, we're united heading into the general.

Hold an In-Person Meeting

In-person meetings have the benefit of feeling more personal, and of allowing interaction among members of your group. If you choose to hold an in-person meeting, you may ask if any members want to speak up in favor of or against endorsing particular candidates. Do be sure to carefully facilitate this conversation, though, so that even if it's contentious, it doesn't overflow into ill-will.

On the other hand, in-person meetings may be more challenging for some members of your group to attend. Single parents and group members who work in the evening may struggle to make it to nighttime meetings. Depending on where your meetings are held, and whether you have a group member qualified to serve as an ASL interpreter, some group members may also face accessibility issues for in person meetings. Consider offering the option for members to vote by proxy (i.e., sending a friend) or absentee (voting in advance) if they are unable to make it to the meeting.

Set up an Online Vote

You can also choose to conduct the final endorsement decision online, using online software to come to group consensus. [OpaVote](#) can be used to create online polls that group members can vote in. Once you've created a poll, you can email it to group members. Online polls should not be shared on public websites like Facebook, to ensure non-group members aren't influencing the vote.

In general, online votes will be more accessible to group members than in-person votes, because online surveys can be taken on each member's own time in their own home. Still, it is important to make sure your poll is clear and easy to understand. Some group members may be less familiar with online polling software than others, and may struggle to deal with new technology if there are too many options or if the options are unclear.

Online votes are necessarily less personal than face-to-face meetings. This can help prevent arguments between group members, but also reduces the opportunity for dialogue about pluses and minuses of different candidates. Members often raise points during in-person meetings that would go unheard during an online poll. As a best practice, we recommend that even if you're

ultimately going to be voting using an online poll, you hold at least one meeting to discuss the candidates before doing so.

Make the Announcement

After your group has come to a decision about which candidate(s) to endorse in the coming election cycle, it is time to announce that decision. There are two announcements you have to make: internally, to your own group; and externally, to the media.

Once you have come to a final decision, you will have to let your full group know about the endorsement. Regardless of whether you voted in person, online, or using another method, there will inevitably be some group members who were unable to participate in the vote. It's vital that all group members are informed about your endorsement decision before you go public with it. Having some group members read about the decision after the fact in the press would be particularly bad for morale.

- » Prepare an Internal Statement. Whoever controls your group website, Facebook page, or email list should be in charge of drafting an internal statement. The statement should reiterate the decision-making process, the results of the vote, and why you are excited to endorse the candidate(s) you've chosen. It is also a good idea to give a heads up as to what your group will be doing in support of the endorsement, such as canvassing, phone banking, and voter registration efforts.
- » Prepare a Press Release. At the same time the internal statement is being drafted, whoever handles external communications should work on drafting a press release about your endorsement. If you have a dedicated spokesperson, that's great. If not, a group member who enjoys writing can take on the responsibility.
 - » The press release should be short—no more than three paragraphs—and emphasize why your group is excited to make this endorsement. (See Indivisible's training resource).
 - » This is a great place to highlight particular policy stances your group supports and to demonstrate the importance of those policies in securing your endorsement.
 - » This statement should be fully focused on the candidate, and why you are excited to work on their behalf in the upcoming election. It can include one or two quotes from group members, and should end with a line reemphasizing that your group is excited and ready to get to work to elect the candidate in question. There is no need to explain your internal decision-making process in the press release.
- » Release the Statements. After the internal statement has gone out to members and you've allowed a short time frame to answer questions from your group members, you can release the external statement.

- » Contact the Candidates. First, send the statement along with a quick note to any candidates who responded to your candidate questionnaire, thanking them for their time, and letting them know who your group decided to endorse. Make sure to let the candidate you've decided to endorse know first, and then send follow-ups to all other candidates. You should not be coordinating with the candidate's campaign at this stage, so keep your interactions short and to the point, and don't engage in conversations about non-publicly available information.
- » Contact the Press. Next, send the statement out to local press, remembering to BCC all contacts. Make sure you've included anyone who covers local campaigns and elections. If you don't know who that is, check the newspaper's masthead, or search to see who has recently written stories about other races. Twitter can also be a great tool for finding contact information for reporters who might be interested in covering your endorsement. Finally, post your public statement on your social media accounts.



Remember: if you spend money on publicising your endorsement to the general public, federal, state or local campaign finance laws may apply. It also may be prudent to check whether endorsement communications to the general public are required to have authority lines that state, among other things, who's making the communication and whether or not it was authorized by any candidate.

NOW THE FUN STARTS!

Once you've made your endorsement announcements, election season swings into full gear. We will have a series of guides coming out over the next four months that will cover everything from voter registration, to hosting events with candidates, to canvassing and generating local media attention. Stay tuned over the coming months to learn more about best practices for political campaigning, and how your group can have a real impact on electoral politics. Finally, always feel free to reach out to field@indivisible.org to let us know what resources would be most helpful to your groups. You are the leaders of this movement, and we're excited to stand Indivisible with you as you take on electoral politics.

SAMPLE ENDORSEMENT PROCESS

As explained above, every group should approach these decisions in the way that is best for your group and keeps with your values. To aid in your process, here is a sample (imagined) process from start to finish that you can tailor to your needs:

Context: Indivisible ABC is excited that there are several fantastic candidates running for mayor in their city! It's five months before the primary election—things are starting to heat up and the group is thinking about getting more actively involved. There are a few really great progressive candidates in the race, and this election could make a big impact in their city.

Start the Conversation. Indivisible ABC has some members that are really excited to get involved with the election, and some others who are nervous it will cause factions in the group. Using this guide, their primary group leader Ana started talking with their members about the importance of endorsements, why they're powerful, and all of the good reasons to engage in a primary. At the same time, their outreach coordinator, Jessie, began to discuss the possibility of endorsing with the other four Indivisible groups in their city.

Make a Decision to Consider an Endorsement. After having several conversations as a full group and with other groups in the area, Ana gets together Indivisible ABC's steering committee of five people. They weigh the pros and cons of endorsing and decide that this election is too important for the future of their city for them to sit out-- they need to get involved. They feel confident that their group can have a productive conversation about the issues and will be prepared to come together in the general election no matter the outcome. Now, they need to determine how they will run the process. The other four groups in the city also decide to endorse, but choose to participate in Indivisible ABC's vote, instead of holding their own, because they're much smaller.

Have a Leadership Meeting to Determine a Process. A week later, Ana sets a time for a two-hour-long steering committee meeting to determine the process. At this point, there are four months until the primary election, so her group has a month to run the process, and then will have three months to actually get involved in the election. In advance of the meeting, Ana takes the time to write out a clear, timed agenda. She sends the agenda to her steering committee the morning of the meeting.

When the meeting starts, Ana walks through clear norms and the steering committee agrees that each decision requires three positive votes from the five members of the steering committee. The entire steering committee needs to agree to the final process and will leave any small disagreements behind once they've made a decision. Together, the steering committee answers the follow questions from the Endorsement Guide:

- » Who makes the decision on the process? The entire steering committee will set the process as outlined above.
- » Who can vote? Any group member who has attended an action or meeting in the last six weeks is eligible to vote on the endorsement. The steering committee will send out the list of eligible members a week in advance of the meeting.

- » How will you vote? The group will vote anonymously. They will all come together for a meeting and cast a secret ballot. Group members will be allowed to send a proxy or cast a ballot early by absentee.
- » What level of consensus do you need? The group will only move forward with a candidate that receives 2/3 majority. After the first vote, the two highest vote winners will go to a second round if none receives 2/3 in the first vote.
- » What happens to members who disagree? The group's planned election activities will be around the endorsed candidate. All members are encouraged to join, but are welcome to canvass or phone bank for other candidates as individual volunteers. They will agree in advance that no group members will speak poorly of the group's endorsed candidate even if that was not their first choice and any members who chose to volunteer for other candidates will not represent the group when doing so.
- » How will you roll out the process to group members? The entire process will be outlined in an upcoming group meeting, posted on the private group Facebook group and sent out to the list. This will include all the information outlined above about the process.

Announce the Endorsement Process. Once the steering committee of Indivisible ABC finalizes their process, they announce it to their group at the next group meeting. They make it clear that this process is finalized, but accept all questions about the decision making and the process itself. Ana and the rest of the steering committee stay late after the meeting to answer additional questions and follow up individually with members who have concerns.

Do the Research. The candidate research committee researches the candidates' current positions, previous votes and sends out the candidate pledge. This research had been going on over the last few weeks, but ramps up in the lead up to the vote. The research is finalized two weeks before the group endorsement vote, which is about 3.5 months before the primary.

Send the Group Candidate Information. Two weeks before the endorsement vote meeting, the candidate research committee sends around information to all the members for review. This includes the candidate pledge, an outline of each candidate and a shorter document that summarizes the major differences between the candidates. This is sent out a few times on different platforms.

Hold the Endorsement Meeting. About three months before the primary, endorsement day arrives! After giving group members two weeks to review the candidate information, the voting meeting is held.

Accessibility: The meeting is held in an ADA accessible space and group members are able to vote either by proxy or in advance by absentee if they're unable to attend. All group members receive a list a week in advance of who is permitted to participate in voting. One group member who has never attended an event shows up -- a group member explains the process and voting requirements. The group member commits to come to the next event and leaves understanding the process.

Conversation: Ana introduces the agenda for the evening and sets norms. She begins by clearly explaining the entire endorsement process and voting structure. The candidate research committee then presents each candidate in the race. There is a representative from the group who supports for each candidate who speaks for three minutes about what sets that individual apart, followed by five minutes of questions for each candidate.

Since there are 100 people at the meeting, there is no group-wide discussion—instead, there is a twenty minute breakout where folks can discuss with one another.

Disagreements: During the breakout, there are a few small arguments that break out between proponents of different candidates. Luckily, the steering committee had pre-identified several moderators who float around to assure all conversation is productive. They approach any groups that are having a serious disagreement and bring the conversation back to the issues in a positive direction. The moderators also use this opportunity to remind folks that at the end of the night, everyone will agree to get behind one candidate as a group.

Voting: Indivisible ABC casts secret paper ballots. After two rounds of voting, they are able to pick a candidate by an over 2/3 majority! The steering committee announces the results and reminds folks of the norms they had agreed to earlier in the evening. They also share their first actions to support that candidate.

Make the Announcement. Once the decision has been made, Indivisible ABC puts together a statement to notify all group members of the decision. After group members are notified, the press team crafts a public statement. They first send it to the candidate they endorse, followed by the candidates they didn't endorse (with a note thanking them for completing the candidate pledge) and then to a local press list. Indivisible ABC then kicks into high gear in support of their endorsed candidate.

CONCLUSION

If you're going to be using this guide and making endorsements, please feel free to reach out to our organizing team. If you're not sure who the organizer is for your area, email us at field@indivisible.org to get in touch. And please let us know when you make decisions so that we're able to amplify the important work you're doing.

Using your group's resources, enthusiasm and energy on behalf of great progressive candidates who represent their constituents is a meaningful way to show up for your community and take a positive stand against the Trump agenda.

Getting involved in elections can be intimidating. But it's also a great opportunity to further define your group's values and goals, and to start showing up for inclusive progressive candidates in 2018 and beyond. Whether your group ultimately decides to endorse candidates this cycle or not, considering the endorsement process will be useful as you plot out how to get involved in electoral politics.