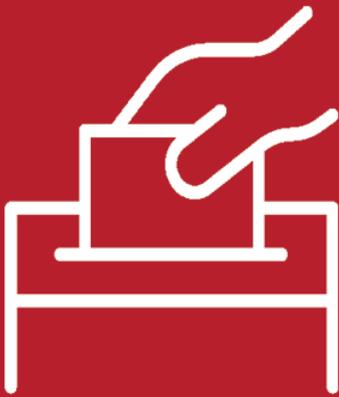




# CIVIC ENGAGEMENT

*EVERY CONGREGATION COUNTS  
EVERY VOTE COUNTS*



## CANDIDATE ENGAGEMENT JUNE 2018





## **We believe that our democracy is strongest when everyone has the opportunity to participate.**

As we work together to fulfill the sacred mandate of *tikkun olam*, world repair, non-partisan civic engagement in service of our enduring values is an essential way that we stay active in our communities.

The Reform Jewish Movement's Civic Engagement campaign seeks to mobilize the entire Reform Jewish community -- be it through a congregation, a NFTY region, a camp community, or campus activism.

We know our Movement is strongest when we act together. If you believe that civic engagement is important for the Jewish community, we want you with us.

Use this Candidate Engagement toolkit to help your community plan its strategy for meaningful, Jewish, nonpartisan civic engagement in 2018.



## TABLE OF CONTENTS:

[What is candidate engagement and why does it matter?](#)

[Guidelines for staying nonpartisan](#)

[A how-to guide: Planning a nonpartisan candidate forum or debate](#)

- Identify community partners
- Choose the date, time and location
- Determine the event format
- Invite the candidates
- Develop a turnout strategy
- Plan event logistics
- Designate volunteer roles
- Engage the media

[Engaging candidates beyond your event](#)

[Follow up ideas and strategies](#)

[Appendix A: Sample candidate forum ground rules](#)

[Appendix B: Sample invite letter to candidates](#)

[Appendix C: Sample turnout email](#)

[Appendix D: Sample press release](#)



## WHAT IS CANDIDATE ENGAGEMENT AND WHY DOES IT MATTER?

The months leading up to an election present a unique opportunity to raise the profile of issues important to your community and build relationships with candidates running for elected office at the local, state, and national levels. Whether your congregation hosts its own nonpartisan candidate forum or debate, likely in partnership with others, or you attend an event planned by another organization in your community, there will be many opportunities for your congregation to learn about candidates and their views.

Engaging with candidates plays a critical role in your civic engagement strategy by:

- **Educating your community on important social justice issues:** events with candidates provide the opportunity to raise a broad array of social justice issues that are meaningful to your community and allow the public to hear candidates' views and positions. In some cases, your forum or debate might be the only time a candidate addresses certain issues in public. This helps educate voters on candidates' positions while also raising the profile of these issues across the community. If you attend a candidate event that you did not plan, you can also ask about key issues that might not have been raised already.
- **Creating and developing relationships with candidates:** candidate events need not be the only or last time you interact with candidates and elected officials. If your congregation chooses to plan a debate or forum, you will be reaching out and working with the candidates and/or staff in positions to make a difference in your community. This gives you the base to build a relationship with candidates even before election day.
- **Building the power of your congregation:** By hosting an event, especially with partners, your congregation can position itself as leader on civic engagement and social justice both in your community as well as with elected officials.

Engaging with candidates takes time, planning, and, often, strong partnerships, but can be an effective tool to educate voters, raise the profile of important issues, and build your congregation's power. When we invite candidates to publicly share their policy positions, we gain the opportunity to learn about the candidates' positions, evaluate their views against our own, and make informed decisions at the ballot box in November.



## GUIDELINES FOR STAYING NONPARTISAN

You must take care to keep your forum nonpartisan. As outlined in our [Civic Engagement Rules and Guidelines](#), both the Federal Election Commission and the IRS have rules that apply to the civic engagement work of nonprofits. There may also be state-level election rules; you should check with your state Board of Elections to ensure compliance. Most important to keep in mind: 501(c)3 entities, including synagogues, may not implicitly or explicitly endorse or oppose candidates or parties for office without jeopardizing their nonprofit status.

Specifically, the IRS prohibits nonprofits from intervening in political campaigns. The [IRS lists out specific factors for 501\(c\)3 organizations](#) that are hosting candidate forums and debates that the IRS will use to determine if a nonprofit is violating the rule of intervening in campaigns. Some of the IRS guidelines to ensure your event remains nonpartisan include: <sup>1</sup>

- covering a broad range of issues;
- giving each candidate equal time to present their views;
- ensuring the moderator stays neutral throughout the event; and
- asking unbiased questions that do not ask candidates to agree or disagree with specific positions or platforms of the sponsoring organizations.

A few additional tips include:

- refraining from endorsing any candidates or political parties;
- inviting all visible candidates for a specific office and only moving forward if both candidates (in a two-candidate race) or two or more candidates (in a multi-candidate race) agree to attend (see more on invitations in the section below);
- asking the moderator to state at the beginning that the views of the candidates do not represent the views of the sponsoring organizations and that the sponsoring organizations are nonpartisan and do not endorse candidates; and
- keeping all candidate and campaign materials outside of the room, separate from any other materials such as nonpartisan voter registration forms and get-out-the-vote.

Your candidate forum or debate should not try to suggest or imply which candidate is “better” on the issues in relation to your views or the congregation's positions, but rather give the opportunity for the candidates to present their views and educate voters.

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<sup>1</sup> <https://www.nonprofitvote.org/documents/2018/02/hosting-candidate-forum-nonprofit-guide.pdf/>



If you have questions about how to keep your event nonpartisan, be sure to consult an attorney or your local Board of Elections. Here are a few resources to make sure you're staying on track:

- [A Nonprofit's Guide to Hosting a Candidate Forum](#), Nonprofit Vote
- [Hosting Candidate Debates](#), Bolder Advocacy
- [The Rules of the Game: A Guide to Election-Related Activities for 501\(c\)\(3\) Organizations](#), Alliance for Justice

## A HOW-TO GUIDE: PLANNING A NONPARTISAN CANDIDATE FORUM OR DEBATE

This section will walk you through the process of hosting a candidate event and provide tips and guidance for congregations seeking to organize and execute a successful forum or debate.

For a month-by-month list with everything you need to do to plan an event, check out [the Candidate Forum Checklist from Nonprofit VOTE](#).

### Identify community partners

A great way to expand the audience and community interest for your candidate forum is to plan the event with other partner organizations. Hosting a candidate event can also be a great tool for entering into relationship or strengthening existing relationships with other local organizations, which can help to foster a basis for cooperation and collaboration in the future. Is your congregation in relationship with other faith-based organizations and congregations, or are there others you can invite, especially those across lines of race and faith? Are there other Jewish organizations and congregations in your community with whom you can partner? Other nonpartisan civic organizations, especially those with candidate event expertise, may be good partners in this work too.

When working with partners, you should be as clear as possible from the beginning about the expectations of the partnership. Partners might help with all aspects of planning, from logistics, to recruiting volunteers, to helping with turn out. Some may be able to offer financial support. Others might just want to be recognized on the invitation or press release. Once you are clear about the roles your partners are willing to play, work with them to establish a small planning committee responsible for delegating tasks and moving the event forward.



## Choose the date, time and location

Candidates are most likely to agree to events held mid-week. You should plan to host the event in the evening, allowing plenty of time for people to travel and arrive after work or school. If you are looking to invite candidates currently in office in another city (i.e. Congressional candidates who are incumbents or members of the state legislature who are in the capital city), make sure you plan your event during a recess period. You might also want to check a community calendar to avoid any other prominent events happening at the same time.<sup>2</sup>

When choosing a venue, consider the location, expected audience size of the forum, parking availability, and accessibility for people with disabilities. Synagogues are often an ideal location. No matter what, avoid a location that has any association with a partisan issue, candidate, or political party. Because of the public nature of a candidate forum, be in touch with the candidates and local law enforcement to discuss necessary security arrangements for the event.

## Determine the event format

A candidate event can follow several different formats.<sup>3</sup> Three common ones include:

### *Debate*

In this format, candidates share the stage and interact directly with one another. Within the debate format, you can host a town hall meeting (audience members ask the questions), a panel (pre-selected people ask the candidates questions) or use a single moderator who is the only person to ask questions. In general, town halls and panels solicit greater community participation, and the use of a single moderator allows the moderator to drill down on the candidates and specific issues. In some cases, the candidates are given prepared questions in advance, some of which may be asked at the forum, in addition to follow-up questions from the moderator and questions from the audience.

### *Forum*

At a forum, the moderator or audience members directly ask questions of the candidates. The candidates do not directly engage with each other, although they may be on stage at the same time. The candidates are not usually given the exact question in advance although they might be aware of themes that they will be asked to discuss.

### *Discussion*

In a discussion, candidates are joined on stage by community members. Candidates and community members engage in a public conversation, where questions and answers are exchanged.

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<sup>2</sup> <https://www.nonprofitvote.org/documents/2018/02/hosting-candidate-forum-nonprofit-guide.pdf/>

<sup>3</sup> <https://www.rockthevote.org/wp-content/uploads/publications/field/host-a-candidate-forum-how.pdf>



These are just a few examples of traditional event formats. However, as long as you stay within the nonpartisan framework, your event can follow any format that makes sense for your community.

Regardless of the format you choose, you should establish ground rules in advance so all candidates understand what is expected of them, what the audience's role will be, and how the event will run. See Appendix A for a sample list of ground rules.

## Invite the candidates

When you are planning to host a candidate event, it is important to decide which candidates you want to invite – those running for U.S. Congress? State legislature? Local school board? District attorney? Sheriff?

Start by thinking about the issues that are most important to your congregation and your partners, including any current issue campaigns, and which elected officials have the most jurisdiction over those issues. Are they federal, state, or local issues? You should be able to turn out a large number of voters in the district that the elected office represents in order to ensure the event is attractive to the candidates.

Once you decide which candidates to invite, send the invitations. Make sure to provide a description of your congregation and your partners, including the number of members you collectively have, to give a full sense of the power of the group hosting the event. See Appendix B for a sample invitation. Be sure to invite the candidates well before the forum – three months ahead is ideal. You might want to propose a few dates to the candidates to accommodate their busy schedules. After sending the initial invite, follow up with the candidates and their staff by phone. Following up regularly, by phone and in writing, is key to getting responses. Be sure to reconfirm with the candidates in the days leading up to the forum.

There are a few guidelines you must follow when inviting candidates to the forum to ensure you remain nonpartisan:<sup>4</sup>

- Invite **all viable candidates** for a specific office, not just the most prominent. Follow up equally and encourage all to attend.
- Only move forward if both candidates (in a two-candidate race) or two or more candidates (in a multi-candidate race) agree to attend.
- In addition to following up, confirm the with the candidates in the weeks and days leading up to the event. If one candidate cancels with very little notice in an event for a

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<sup>4</sup> [https://bolderadvocacy.org/wp-content/uploads/2012/05/Hosting\\_Candidate\\_Debates.pdf](https://bolderadvocacy.org/wp-content/uploads/2012/05/Hosting_Candidate_Debates.pdf)



two-party race, you are permitted to move ahead. You should tell the audience that this does not signify that you are endorsing the candidate in attendance.<sup>5</sup>

## Develop a turnout strategy

Turnout is everything! Work with your planning committee to develop a strategy for turnout across your partners, including a target number of people for each partner to turnout. Decide in advance if you need everyone to RSVP, and if you will require tickets or an email confirmation to attend.

To reach your goal for the number of attendees, identify point people to do outreach within your congregation. If you have a social justice committee in your congregation, this is a great opportunity to engage its members to recruit attendees. You can adapt the sample email in Appendix C to publicize your candidate event within your congregation or [adapt this sample flyer](#) to distribute to your congregation and community. We have also created [recommendations for promoting your event on social media](#). Don't forget to use the hashtag #ReformJewsVote!

Use all available outlets for reaching your membership – one-on-one emails, congregational bulletin or newsletter, announcements by clergy or lay leaders from the bimah, social media and website posts, and phone trees to encourage as many attendees as possible. You can ask members to RSVP to a specific individual or via a web form, and then follow up in the days before the event. Individual outreach is always key when trying to get people to attend an event.

Invitations need not be limited to the members of your congregation and those of your partners. The more people that attend, the more that will learn about the issues and candidates, and the more the candidates will understand the true reach of your congregation and your partners. Advertise in local papers, promote at community events, and ask members to reach out to their personal networks.

## Plan event logistics

Important reminders:

- **Your event should begin on time.** Creating a strict timeline for the event and sticking to it is vital to your event's success.
- **All candidate events require a moderator.** Moderators will introduce the candidates, start the discussion, and manage the program's flow. Your moderator should be someone who has credibility in the community and who can be trusted to be

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<sup>5</sup> <https://www.nonprofitvote.org/documents/2018/02/hosting-candidate-forum-nonprofit-guide.pdf/>



professional, neutral, and fair. The moderator must treat all candidates equally and feel comfortable enforcing the ground rules for the event. This is often a great role for a rabbi or other clergy member.

- **Decide how long the event will be and determine time limits for each section of the event.** How long will each candidates' opening and closing statement be? Try to limit prepared statements to a few minutes each to maximize time for audience questions. How much time will you set aside for questions and answers? Make sure that you have assigned a person to keep time and establish a system for letting the moderator and candidates know when they are running out of time. Consider preparing the timekeeper with signs which read "1 minute left" and "Stop." Who will speak first, and who will speak last? Use a fair method for deciding, like flipping a coin.
- **Ensure that your candidate event is accessible.** Hire an American Sign Language interpreter, and make sure that microphones are programmed to be loud enough for all to hear. Reserve seating for those with accessibility issues in the front and back of the room. Designate a member of the planning committee to coordinate inclusion efforts, and when advertising for the event, be clear that those who need accommodations can contact this person. For more information, please see the [URJ's Disabilities Inclusion Learning Center](#).
- **Consider providing childcare.** Especially for events that happen in the evening after traditional working hours, giving parents the option of childcare at the site might incentivize families to attend.

## Designate volunteer roles

As you are planning, be sure to think through the range of tasks that will require volunteer support and develop a plan to recruit volunteers far in advance. Volunteer roles might include:

- Passing out fliers, sending emails, and making phone calls to publicize the event in advance
- Promoting the event on social media before and during the event (use the hashtag #ReformJewsVote)
- Staffing the registration table at the entrance of the venue
- Greeting and ushering audience members before the start of the event
- Working with the media
- Keeping time
- Collecting audience questions for Q&A
- Providing childcare
- Helping to set up the space and clean up after the event

For volunteers with duties during the event itself, reconfirm with them a week or so in advance to make sure they are still planning on attending and understand what is expected of them.



## Let the RAC know about your candidate event

We are more powerful when we work together, and with the full force of the Reform Movement behind this Civic Engagement Campaign, our impact grows exponentially! We want to celebrate your community's work and make sure it is counted as part of our Movement's overall efforts. [Let us know about your candidate engagement efforts by filling out this short form.](#)

## Engage the media

The press can be an excellent way to generate interest in and amplify the success of your forum. Creating media buzz before the event, whether through coverage by a local paper or by placing an op-ed or letter to the editor by someone from your planning committee, will generate interest from the public, increase your congregation's profile, and help the candidates understand the importance and impact of the event. If you have members of the media who attend and report on the event after, it will continue to educate voters about the candidates and their views and positions your congregation as a leader in civic engagement and social justice issues.<sup>6</sup>

Send a press release, like the sample in [Appendix D](#), to news media about your event 3-5 days in advance (earlier for weekly papers). Local Jewish papers might be especially interested in covering the event. Set aside a central space with access to electrical outlets for media that will attend the forum.

## ENGAGING CANDIDATES BEYOND YOUR EVENT

Engaging with candidates is not limited to hosting your own forum or debate. In the months leading up to the election, candidates for all levels of elected office will hold countless events in your community, whether their own events or forums with other candidates. These are opportunities to ask questions about issues that matter to you and hear the candidates' positions in a public way. Individuals should make an effort to attend events and ask the same questions of all visible candidates for an elected office.

Find events by checking the candidate websites, local community calendars or newspapers, or [following organizations](#) that collate information on local events.

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<sup>6</sup> <https://www.nonprofitvote.org/documents/2018/02/hosting-candidate-forum-nonprofit-guide.pdf/>



Be prepared to ask one question in a succinct, direct way as you will often only get one chance. You want your question to be as straightforward as possible to help ensure the candidate answers it. You can maximize your chances of being called on in a forum or other space if you sit close to the front, wear bright colors that will help the elected official notice you, and raise your hand at the beginning of the Q & A.

Formal events will not be the only opportunity to engage elected officials. Often, candidates for local office will canvas neighborhoods in their community, knocking on doors of people in their district. Some will show up at local gatherings like farmers markets. If you are prepared in advance with one or two questions, you can use the opportunities to learn the positions of the candidates and begin building a relationship. Be sure to tell them your name and the Jewish community to which you belong in order to make that connection for the future.

## FOLLOW UP IDEAS AND STRATEGIES

Once you finish your event, be sure to follow up! Here are some ideas:

- Send thank you notes to all of the candidates in the days following the event.
- If you taped or livestreamed the event, post it to social media and send it to your congregation and partners to allow others who couldn't join to watch.
- Further the media attention by following up with any media present or write an op-ed or letter to the editor about the event. You can also ask a leader in your congregation to write about it for your congregation's blog or bulletin. Make sure any writing stays nonpartisan and does not express views about the candidates or compare their positions to yours or those of the congregation.
- Continue your congregation's civic engagement work by hosting a voter registration drive and encouraging voter turnout. Check out the [RAC's voter engagement toolkit](#) for ideas and strategies.
- At the event itself, let the candidates know that you will follow up after the election to request a meeting – and then follow through! You have a great basis for building a relationship with the newly-elected official. Continue working with your partners to request that the elected official meet with your groups after they take office. Choose specific issues that reflect those discussed at the forum. Often, asking for a meeting within the first 100 days is a time frame that makes sense and will ensure you meet as the elected official is setting their agenda. You can invite them to come back to the



location of the candidate forum for a public meeting, which will continue to show the power of your congregation and your partners.

- Let the RAC know about your Candidate Engagement efforts. We are more powerful when we work together, and with the full force of the Reform Movement behind this Civic Engagement Campaign, our impact grows exponentially! We want to celebrate your community's work and make sure it is counted as part of our Movement's overall efforts. [Let us know about your candidate engagement efforts by filling out this short form.](#)

## APPENDIX A: SAMPLE CANDIDATE FORUM GROUND RULES

Use these examples from the League of Women Voters of the Cincinnati Area<sup>7</sup> to develop a set of ground rules that all partners and candidates agree on for your event:

- Substitutes for the candidate [*will be/will not be*] allowed.
- To preserve a non-partisan atmosphere during the [*forum/meeting*], no campaign banners, signs or other campaign paraphernalia will be allowed, including on the candidate's person.
- Campaign literature may be placed on the designated table [*before/after*] the meeting only on the table outside of the room.
- Candidates should arrive 15 minutes before the event begins to review the format and instructions for the event.
- A moderator will conduct the event and has the authority to enforce the event's ground rules and format.
- Outline the time limits of the event. A timekeeper will keep track of the time allotted to candidates as they speak and/or respond. The timekeeper will hold up signs "1 minute left" and "Stop" at the appropriate times.
- Questions from the audience [*will be/will not be*] screened. They will be asked by [*the moderator/directly from the audience*].

Other rules may be added to this list as needed.

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<sup>7</sup> <http://www.lwvcincinnati.org/files/candidatesmeetings.pdf>



## APPENDIX B: SAMPLE INVITE LETTER TO CANDIDATES<sup>8</sup>

Dear [*Candidate's Name*]:

On behalf of [*Congregation name*], you are invited to participate in a Candidates' [*Meeting/Forum/Night/Debate*] for candidates running for [*name of office*], to be held on [*date, time and location*]. In partnership with [*names of partner organizations*], we would like to extend an opportunity for all candidates for [*name of office*] to introduce themselves to our community, share their public positions, and answer questions about issues of importance to the community.

*[Include information here about your congregation and your partners, including why you are hosting this event, how many members you collectively have as part of your organizations, and the issues or themes you want to cover during the event.]*

As a 501 (c) 3 organization, [*congregation name*] does not support nor oppose candidates for elected office. All candidates for [*office*] are being invited to participate.

A copy of the format that will be followed for the event and other important information are enclosed. *[Attach format for the event.]*

*[If videotaping or livestreaming, add: The meeting will be recorded/livestreamed by (name and information.)]*

Please respond to confirm if you will be joining us for this important community event by notifying [*me/name - add address if different from chair*] no later than [*date*]. If you have any questions, please feel free to contact me at [*phone*] or by email at [*email address*].

Sincerely,  
[*Name of Committee Chair*]  
[*Chair's Address*]

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<sup>8</sup> <http://www.lwvcincinnati.org/files/candidatesmeetings.pdf>



## APPENDIX C: SAMPLE TURNOUT EMAIL

Dear [Name],

Please join [congregation name] on [date and time] at [location] for an event with candidates running for [name of office]. In partnership with [names of partner organizations], we are extending an opportunity for all candidates for [name of office] to introduce themselves to our congregation, share their values and positions, and answer questions about issues of vital importance to our community including [priority issues/main focuses of the event].

*[Depending on the format of the event, include a note about how audience members will be able to ask questions.]*

As a 501(c)3 organization, [congregation name] does not support nor oppose candidates. All candidates for the office are being invited to participate.

Please RSVP to [contact person]. If you require accommodations, please reach out to [contact information for person responsible]. I hope to see you there!

Sincerely,

*[Name of committee chair or outreach team member]*

## Appendix D: Sample press release

**How to use this template:** Fill in the relevant details about your event, including a media contact – a volunteer who is willing to field questions and be in communication with interested members of the press. Insert a brief, 2-3 sentence quote from a leader in your community about the event, and make sure you're comfortable with that quote being published in news outlets. Bold any names of individuals, organizations or congregations that you include. Then, copy and paste the text of the press release into the body of an email, and send it to members of your local media. Many local papers, TV and radio stations will have websites with "contact us" pages. You can also call the main phone number of any local news outlet and ask what email address the press release should be sent to. [If you have questions about how to pitch your candidate forums to local press, contact the RAC's Public Relations Manager, Jenna Galper, at \[jgalper@rac.org\]\(mailto:jgalper@rac.org\).](#)



## Template

FOR IMMEDIATE RELEASE

[Date]

Media contact:

[Name, email and/or phone here]

### **[Congregation/Community name] Hosts Candidate Forum for [office, e.g. “Los Angeles School Board”] as Part of Reform Jewish Movement’s Nonpartisan Civic Engagement Campaign**

CITY NAME – On DATE, CONGREGATION/COMMUNITY will host a forum for candidates running for [office] to hear from them on issues of vital importance to the Reform Jewish community, including [insert priority issues/main focuses of your community here]. [Name the candidates who are invited and/or confirmed to attend].

WHAT: Candidate forum hosted by CONGREGATION/COMMUNITY

WHERE:

WHEN:

“[Insert quote from a leader in your community here. The quote should be 2-3 sentences, and should answer the questions: Why is your community hosting this event? What is Jewish about civic engagement? What are you hoping to achieve?]” said **NAME**.

This candidate forum is part of the Reform Jewish Movement’s nonpartisan campaign, **Civic Engagement: Every Congregation Counts, Every Vote Counts**, which seeks to empower all people to exercise their right to vote and ensure that Jewish voices and values are present in the public square. Reform Judaism is the largest and most diverse Jewish Movement in North America, including roughly 900 congregations, 2,000 rabbis and 1.5 million people. Learn more at [www.rac.org/civicengagement](http://www.rac.org/civicengagement).

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