

BEST PRACTICES FOR SHARING THE RESULTS OF CANDIDATE INTERACTIONS WITH YOUR PN-3 ADVOCACY PARTNERS AND COALITION MEMBERS

Once you engage with a candidate, your next step should be to share what you've learned with your colleagues, advocacy partners, and coalition or movement allies. This is how our movement builds the collective advocacy power required to accomplish our policy goals.

Sharing information and lessons learned unifies and strengthens our movement's advocacy efforts, enabling coordinated and strategic actions that build on one another. It provides transparency to colleagues and partners around where candidates stand on critical issues, fosters accountability by increasing the number of advocates prepared to hold candidates to their commitments, and builds trust among movement partners.

Please share details from your candidate interactions via [a quick and easy form here](#) to better equip our movement with tools, support, and resources.

Given the value of reporting back to relevant parties after each instance of candidate engagement, following a few key guidelines can help set you up for success.

- **Identify coalition goals.** Before engaging with candidates, communicate with your movement partners. Determine your common goals and develop a shared understanding of key insights each party seeks from candidate interactions. Importantly, set up a system for reporting back to the coalition on insights from candidate interactions.
- **Preparation and documentation.** Before engaging with candidates, assess their priorities and tailor the meeting accordingly. For example, if the candidate's top issue is the economy, then advocates should focus on how their issue boosts the economy. Additionally, establish clear objectives for the interaction. Document the conversation meticulously, noting key talking points used, commitments made, questions asked, possible areas of confusion where education is needed, and any relevant quotes. Ensure all documentation is accurate and nonpartisan. Unless necessary for ADA accommodations and agreed upon by all parties ahead of time, these meetings shouldn't be recorded.



- **Clear and consistent communication.** Summarize the interaction in a clear, concise report shared on a regular basis (e.g., during a coalition meeting, via a shared spreadsheet, etc.). Highlight key takeaways, including candidates' positions on critical issues, commitments made, and any follow-up actions required. Consistency in reporting helps maintain clarity and trust among your partners.
- **Confidentiality and sensitivity.** Handle sensitive information with care. Be mindful of the confidentiality of certain details, especially if they involve private discussions or commitments not yet public. Only share information that is appropriate and respectful of all parties involved.
- **Actionable insights.** Provide actionable insights and recommendations for your partners. Highlight how candidates' positions may impact your advocacy and suggest strategic responses. For example, if a candidate cares about business leaders' perspectives, encourage business leaders you partner with to engage that candidate. This approach transforms information into meaningful advocacy insights.
- **Follow-up and accountability.** Track candidates' commitments. Keeping your coalition informed about ongoing developments and holding elected officials accountable to their promises strengthens your advocacy position. As a 501(c)(3) you cannot take a position on a candidate. This accountability is for policy advocacy purposes and not candidate accountability.
- **Transparency and trust.** Maintain transparency in all communications. Clearly state the sources of information and the context of interactions to build trust and credibility within your coalition. Open and honest communication is key to maintaining a strong, united front in your advocacy efforts.

Each member of our movement is powerful alone, but we are far more powerful as a collective. Following these steps will help build the collective advocacy power required to secure victories for infants, toddlers, expectant parents, and families.

