

# WHERE TO ENGAGE WITH CANDIDATES ON YOUR ISSUE

Direct, in-person conversations with candidates are valuable opportunities to build support for prenatal to three issues and develop relationships with potential policymakers. Before attending events, however, advocates should understand the purpose and tone of the event, how to best communicate and represent their organization at that event, and any expectations that candidates and event hosts may have of the event and of all attendees. Social media engagement should be considered different from in-person engagement and is not covered here; for more information, consider digital media guides by [Pollicy](#) or [Voter Voice](#).

## Before an Event

Before attending an event with incumbent candidates, organizations should learn if the incumbent candidate will be attending in their official capacity (i.e., as a government official) or attending as a candidate as part of their election campaign. This will help organizations adhere to legal restrictions while demonstrating credibility and building trust when asking questions. For example, an event conducted by a policymaker in their role as a government official will focus on the activities they can control in their current office. But a campaign event will focus both on their past record as well as on the issues they will face in the office they're running to hold.

Before an advocate attends an event, whether the event involves incumbent candidates or non-incumbent candidates, they should determine ahead of time, with the team, any strategic goals or permissible/non-permissible actions. The advocate should know if they are attending in their personal capacity, or on behalf of their organization (e.g., intending to ask organizational policy questions, or wearing branded t-shirts). If multiple representatives from an organization are attending, all should know in advance the organization's goals, talking points, and pre-determined questions to ask the candidate, and each person's role should be defined with duties such as speaking roles, photography/video recording, note-taking, speaking with press, etc. [See here](#) for guidance on preparing questions and key messages when engaging with candidates.

Each event may have unique expectations or norms that can impact an organization's relationships with candidates, other groups, and the public. In addition, if reporters are attending events, it's important to be mindful that they may cover questions asked by attendees and the candidates' responses. Learning about the host organization(s) and event rules can help maintain positive relationships with hosts, give a positive impression to other attendees, and help organization members plan ahead for a smoother experience. For example, for a local candidate town hall, organizations should prepare ahead of time to know when and where to arrive, how long to attend, any rules for submitting questions, which topics will be covered, if there will be time to speak with candidates before or after the event, whether the press will be in attendance, and if ally groups also plan on attending.

## Common Places to Engage With Candidates

As you consider engaging with candidates, keep in mind that nonprofit organizations must be careful not to indicate support or preference for any given candidate or political party. That means that organizations should make a good-faith attempt to reach out to all candidates across the political spectrum rather than contacting only one party.

- **Candidate Education and one-on-one meetings.** One of the most powerful tools for a 501(c)(3) organization – and the easiest – is candidate education. Prepare a packet of materials on your issue (e.g., fact sheets, reports, newsletters, even pages printed from your website), and send it to all candidates running for a given office. Invite the candidates to sit down with you to learn more about prenatal to three issues. If one candidate invites you to meet with them, and their opponent doesn't, that's fine: you offered each of them equal opportunity to learn about your policy issues, demonstrating your nonpartisan stance. Taking a meeting with you could indicate they're open to learning more about and supporting your issue. This meeting will establish your organization as a valuable resource on prenatal to three issues, and you can build trust so the candidate will keep working with you as they rise through the ranks of higher government offices.



Organizations should arrive at candidate meetings prepared with issue talking points and specific questions, a brief overview of their organization's work, and candidate research for internal reference. Plan to keep the conversation within the stated time limits, and start the meeting with top-priority questions in case it is cut short or if anyone is late (candidates can have very tight schedules). Consider following the 5/30 rule – you may only have 5 minutes to get your point across, but you should prepare for a 30-minute meeting.

To ensure that your organization does not indicate support or opposition related to a candidate, do not talk to journalists about these meetings, and do not tell journalists which candidates accepted your invitation for a meeting, and which ignored you.

- **Organization office or event visits.** In addition to one-on-one meetings, organizations should consider inviting candidates to tour their facilities, meet with storytellers, or attend their hosted events. Incumbent elected officials cannot campaign while on official duty, so if invitations go to incumbents' official phone numbers, emails, or mailing addresses, they may attend in an official capacity and cannot discuss campaign activities while visiting. For any candidate, incumbent or not, be careful not to indicate support or preference for them or their opponent(s). Do not allow the event to turn into a campaign event or fundraiser! Check with an attorney if you have further questions (e.g., if you're wanting to allow candidate(s) to invite journalists to the event).
- **Candidate town halls.** Many neighborhood associations, civic and business associations, and other advocacy organizations host candidate town halls. These spaces are where candidates are prepared to share their positions and track issue questions closely, and the press frequently attends. Consider checking with civic associations and organizations to see if they plan on hosting town halls, or follow their social media or email newsletters for updates. When posing questions at these public forums, ask open-ended questions that elicit an in-depth response to a candidate; it would violate your 501(c)(3) status to say: "Our organization believes X; do you agree?" or to say "If elected, do you promise to support Y policy that our organization endorses?"
- **Issue roundtables.** Advocacy organizations, 501(c)(3) organizations, and civic institutions may host open-to-the-public issue roundtable discussions. Organizations should consider attending and asking questions if the issues covered in these roundtables overlap with prenatal to three issues. But, as noted above, your questions should be open-ended to elicit an in-depth policy response from the candidate.
- **Annual community celebrations.** Incumbents and other candidates often attend major annual celebrations in their districts, such as 4th of July parades, Labor Day picnics, Juneteenth celebrations, Veterans Day breakfasts, Pride parades, annual neighborhood block parties, etc. These events can offer unstructured space to approach candidates in a casual way, but organizations should be mindful of candidates' limited bandwidth for in-depth discussions.
- **Events promoted by candidates.** Candidates may promote upcoming public events, such as town halls or community events, on their social media or email newsletters. To prevent engaging in prohibited activities, do not attend fundraising events in an official organizational capacity. Individual voters are free to attend fundraising events in their personal capacity but may not do so as advocates representing a nonprofit organization. To navigate the difference, please consult legal counsel.



**TIP:** Any of the candidate events discussed in this toolkit may also be held virtually – and the guidance still holds. For example, third party organizations, such as media outlets (i.e., your local newspaper) may hold virtual conversations with candidates.