



CANDIDATE QUESTIONNAIRES 101:

Forge Early Relationship with Tomorrow's Leaders

Any good advocacy campaign involves building long-lasting relationships with people in power. Our role as advocates is often to educate lawmakers about the issues, connect them to affected constituents, and carefully craft our messages and strategies so they appeal to the particular interests and concerns of each individual official.

Building these relationships takes time. Advocates must ask probing questions, listen carefully to understand each official's motivations and interests, and provide good follow-through.

While it's never too late to start building relationships with lawmakers, some of the best contacts can be made before individuals are even elected to public office.

Getting in on the Ground Floor

Candidates (especially those who have never held public office) are often overlooked as targets in advocacy campaigns, considered too low on the totem pole to even talk to.

Nothing could be further from the truth. Both novice candidates and incumbents seeking another term are eager learners. They want to connect with the communities they aspire to represent and find out what makes people—voters, actually—tick. And they often spend extraordinary amounts of time building their positions on issues, staking out what they are for and against, and promising important constituents how they will champion their causes if elected to public office.

In fact, a “wait-until-they’re-elected” attitude can often be too little, too late. Newly elected officials may have already been reached as candidates on the other side of your issue, and may have even pledged to support the opposition. Sure, pledges are ‘made to be broken,’ but every good politician works hard to keep his or her promises.

More importantly, an educated candidate is more likely to be a thoughtful and fair policymaker. Nothing is more harmful to the causes we care about than ignorance and simple-minded thinking, which often leads to simple-minded, incomplete, and counter-productive legislation and policy proposals.





“Fat Cats” Do It – We Should Too

Corporate America is keenly aware of the power of reaching candidates early, which is why the vast majority of public campaigns in the U.S. are financed by big corporate interests and the individuals who stand to benefit from corporate largess.

Advocates for justice have a lot to learn from corporate strategies. While we may not have fat checkbooks to ease our way into the electoral process, we have something much more valuable for candidates: real people and the real issues they care about.

AIDS advocates and AIDS organizations need to harness our expertise and human capital – there are literally millions of people living with, affected by, and concerned about HIV/AIDS in the U.S. – to educate new generations of elected officials and those vying to fill these positions at all levels of government: school boards, city councils, county commissions, state legislatures, sheriffs, statewide officers, members of Congress, even President of the United States.

It’s worth noting that no elected office is too small a target. Few, if any, national leaders begin their political careers on the national stage, having cut their teeth vying for and winning small, local elections, building up their name recognition and expertise, and continuously striving for the next big office. Today’s PTA candidates are tomorrow’s national leaders.

Candidate Questionnaires: The Perfect Tool

A powerful tool available to nonprofit AIDS organizations to facilitate candidate and voter education is the “candidate questionnaire.”

Candidates want to connect with people voting in their district and need neighborhood groups, non-profits, and the press to help them gain visibility. AIDS organizations can play a vital role in educating both candidates *and* voters about critical HIV/AIDS issues by conducting a candidate questionnaire or survey and publicizing the results.

What follows is a how-to guide and tips on structuring a successful polling project.





Creating a Candidate Questionnaire – A Three-Step “How-To” Guide

1. Stake out your territory:

Narrow your poll to races that are most relevant to the work you do: municipal, county, state, or federal.

Once you have decided which races and candidates you will survey, let other AIDS groups in your region or state know, so that candidates are not sent the same questionnaire by multiple AIDS groups, as duplication of effort could damage your credibility.

If you’re planning to conduct a congressional or federal poll, let C2EA/AIDSVote help you make the effort a huge success.

2. Adhere to IRS rules for nonprofits:

The most important rule to remember is that candidate and voter education by nonprofits is perfectly legal.

Nonprofits are allowed to shape public debate around substantive issues and even promote voter registration and participation in the electoral process.

What nonprofits cannot do is “engage in electioneering.” This means nonprofits may not attempt to influence the outcome of an election (i.e. try to get/prevent the election of a particular candidate).

Activities nonprofits must avoid include candidate endorsements, party endorsements, or campaign-related expenditures, such as making a financial contribution to a candidate’s re-election campaign or passing out a candidate’s re-election literature. You can download a basic outline of these rules at www.c2ea.org/aidsvote.

So what can nonprofits do related to elections? Nonprofits may engage in issue education. Education must be made freely available to all candidates running for a particular race. Voters can be informed of the positions candidates take on substantive issues, including their answers to questionnaires or surveys as well as their public record on the issue.





Nonprofits that engage in candidate and voter education must attempt to reach all candidates for a given race and avoid any appearance of favoritism. For example, a nonprofit should not target candidates of just one party or reach only candidates in hotly contested races.

If you are planning a candidate questionnaire, C2EA/AIDSVote can help you make sure you have all the tools you need, including expert legal advice to ensure your effort is perfectly legal.

3. Create (and follow) your timeline:

Build a project timeline working backwards from the date you plan to release survey results. It's best to release candidate survey results at least 6-8 weeks before an upcoming election to avoid any appearance of electioneering.

Give yourself ample time to find contact information for candidates, send candidates your questionnaire, and do plenty of follow-up. You'll also need time to describe survey results.

Here's a sample timeline:

Week 1: Decide how large or small a group of candidates to survey; draft your questionnaire and cover letter; and contact the local board of elections to find out filing deadlines and candidate names and addresses.

Week 2: Send out the survey to your list of candidates. Be sure to include a deadline giving candidates approximately 7-10 days to respond.

Week 3: You may receive a few calls from campaign staff inquiring about your survey and its questions. Answer each campaign office to the best of your ability and give each caller equal time and assistance in understanding the issues.

Weeks 4-6: As soon as the deadline passes, begin contacting campaign offices to follow-up. Call each office and ask to speak to the campaign director or the candidate. You will likely need to resend or fax the questionnaire again (or several times). Let campaign offices know that the deadline to participate in your survey has been extended 7-10 days.

Week 7: Conduct a final round of campaign outreach.





Week 8: Tabulate results. Enter results into a spreadsheet so they are easier to track and disseminate. Look for trends in the survey results and describe the entire campaign in a short article describing who you surveyed, who responded, and any apparent trends in survey results.

Weeks 9-10: Double-check your work to ensure that candidate names are spelled correctly and that party affiliations are accurate. Give a special designation to incumbents to better inform your readers. Prepare a small packet of materials including results, the questions, your answers, and narrative explaining your views on the issues.

Weeks 11-12: Disseminate your report widely, including to local newspapers, TV, radio and local community groups. Be sure to thank all respondents and share survey results even with those candidates who did not answer the survey. Be sure to include C2EA/AIDSVote in your distribution so we can help publicize your efforts. Your report will serve as a valuable voter education tool, and the survey has already helped establish your cause and concerns among many of the candidates.





Frequently Asked Questions

Q: Where do I find names and contact information for candidates?

A: Candidates must file with the board of elections to be on the ballot and these records are almost always open to the public. Contact your local board of elections to find out the filing deadlines for your jurisdiction as well as the names and candidates who have filed for the races you are targeting. Be sure to target all candidates who have files for a particular race, not just the leading candidates.

Q: How do I create a questionnaire?

A: Keep your questionnaire short (5-10 questions) and specific to issues relevant to the position the candidate is vying for (e.g., don't ask federal candidates questions about issues involving state law).

Make questions specific but not too difficult to answer -- remember the two-pronged goal of gaining support for sound AIDS policy *and* educating candidates about our issues. See the example of a questionnaire created by C2EA/AIDSVote.

If you are targeting congressional or federal races, we highly encourage you to use our questionnaire so that all federal candidates receive a unified message regarding sound AIDS public policy.

Q: How much follow-up with campaign offices is necessary?

A: Basically, a lot! Campaign offices are typically short-staffed and volunteer-dependent. Candidates are pulled in a million different directions and are trying to target their time toward events and activities that are most likely to get them elected.

In general, campaign offices are hectic, disorganized places, so persistence is king. Keep calling, emailing, and faxing until you find the right person in the office to pay attention to your survey. Offer assistance talking through the questions if this help is needed.

Remind offices that the questionnaire is not a test but a learning opportunity for both voters and candidates. Be sure to require the candidate's signature on a completed questionnaire to indicate that the candidate has approved the responses.

Also, remember to ask the office to legibly write the candidate's name and race on the response sheet or risk receiving results with no one's name on them.





Q: What's the best way to display results?

A: Try a simple table format and answer key so that readers have all the information they need to be fully informed of their candidate choices.

Q: How can a survey report be used as an educational tool?

A: The survey report offers innumerable ways to promote voter and candidate education.

It can help start a dialogue with other officials and community groups, be the topic of a community forum, or the subject of a newsletter or press article.

Agency staff, volunteers, clients, and donors are among the first who should receive your survey report, but also broaden your distribution to include allied organizations, other candidates and elected officials, and news columnists and commentators.

All this can help raise visibility about HIV/AIDS as a legitimate election-year issue, the main purpose for the entire project.

"Candidate Questionnaires 101" was created by the [AIDS Foundation of Chicago](#), which is supporter of the [Campaign to End AIDS](#) and [AIDSVote](#).

