

Immigration

Community

Human Services

# A Voter Participation Starter Kit

for Nonprofits and Social Service Agencies

Hunger

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Advocacy

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Nonprofit VOTE

[www.nonprofitvote.org](http://www.nonprofitvote.org)

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Founded in 2005, **Nonprofit VOTE** partners with America's nonprofits to help the people they serve participate and vote. We are the leading source of nonpartisan resources to help nonprofits integrate voter engagement into their ongoing activities and services.

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# A Voter Participation Starter Kit

for Nonprofits and Social Service Agencies

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# Welcome

## Welcome to your Nonprofit Voter Participation Starter Kit!

This toolkit will not only help your organization plan and carry out simple and effective nonpartisan voter engagement activities, but it will also explain why nonpartisan voter engagement work is safe, important, and easy for 501(c)(3)s to do.

Visit our website—[www.nonprofitvote.org](http://www.nonprofitvote.org)—for additional resources on voter engagement tactics and strategies.

Whether you want to hang a poster in your lobby or host a candidate forum, we offer a wealth of resources to help you further your efforts. All of our tools and materials are designed to be flexible according to your nonprofit's needs, capacity, and interests.

If you have any questions, please don't hesitate to contact us at [info@nonprofitvote.org](mailto:info@nonprofitvote.org).

Good luck!

# Why Voting? Why Nonprofits?



**Active voter participation builds healthier communities.** People who vote are more likely to volunteer, advocate, or be active locally in other civic ways. Elected officials are more likely to respond to the needs and concerns of neighborhoods that turn out on Election Day, and are more responsive to agencies and organizations that promote voting.

Democracy is something we can't take for granted. It needs our help. Our communities are more likely to thrive when we participate at higher rates. Voting is a way of connecting to, and caring about, our neighborhoods, our government, and the direction of public policy.

New voters need our help finding their polling location or a number to call for assistance, learning about their voting options, and understanding what's on the ballot and the impact of the election on the issues they care about. Nonprofits have a critical role to play in promoting voting as a safe and easy activity: one that is vital to both the future of those we serve and our own place at the table of democracy.



## Our Size and Reach

Our sector is expansive. There are over one million community-based nonprofit organizations and sites working with populations that have a history of lower participation. We employ more than 14 million people (10% of the workforce), engage more than 50 million volunteers annually, and serve millions every day.

## Our Access and Trust

Nonprofits are among America's most trusted community institutions, and as familiar service providers and advocates we have personal relationships with communities that have been traditionally underrepresented in elections and public policy. Our daily contacts during points of service allow us to utilize an integrated approach to voter engagement. Whether reminding people to vote at intake, hosting a candidate forum, or providing information about an upcoming election, we have the opportunity to use our position to become a powerful voice for voter participation and the issues that matter to our communities.

## Our Nonpartisan Approach and Social Missions

Nonprofits and social service agencies are required to be nonpartisan, giving our messages about voter participation added weight. Voters respond to simple appeals that emphasize the importance of being represented and heard in the political process, which we can use to reach our clients and constituents. Further, our social missions give us an inherent interest in sound public policies that support the communities we serve, and it is therefore only natural that we encourage our constituents to become active and engaged citizens who vote.

Because of our size, reach, trust, nonpartisan status, and social missions, nonprofits and social services agencies are powerful vehicles for promoting active citizenship and increasing voter and civic participation.



### AGENCY-BASED VOTER ENGAGEMENT MODEL

Nonprofit VOTE encourages voter participation work that can be integrated into a nonprofit's day to day activities. It is an agency and community based approach that —

- Reaches people nonprofits interact with every day at our sites and during our programs.
- Uses the personal contacts we already have at points of service, classes, trainings, meetings, neighborhood activities, and more.
- Leverages the core strength of our nonprofit sector's civic assets — our trust, social mission, personal relationships, and community base.

This integrated approach both differs from and complements traditional campaigns that contact voters in their homes through canvassing and phone calls. It has become challenging and expensive to reach voters at home, so many populations are inevitably missed. The populations most affected by this include new and infrequent voters and the more mobile and less resourced populations served by nonprofits.

Nonprofits and service agencies have the capacity to reach people about voting where they learn, engage, and receive services. Through an agency-based approach, nonprofits can make a vital contribution to promoting voter and civic participation without adding a new program — but by incorporating messages and activities about voting into what we already do.



# Voter and Election Participation



**Making a Plan**

**Voter  
Registration**

**Voter  
Education**

**Getting Out  
the Vote**



# Making a Plan

## Behind the Plan

Mapping out a clear plan for your voter engagement activities can help ensure your efforts are successful.

Every organization is different, so it's up to you to decide which activities fit most naturally into your existing programs. Activities generally fall into three categories: voter registration, voter education, and getting out the vote. You can mix and match for maximum impact and effectiveness.

### Get Buy-In

A successful voter engagement plan depends on buy-in from your organization's leadership. Staff and volunteers are often the point people for designing and executing the plan, but the activities are more likely to be carried out organization-wide with clear and strong support from your leadership.

- ✓ Plan a time to discuss your voter engagement activities with your executive director.
- ✓ Bring this toolkit to your meeting and describe the activities you think are a good fit for your organization – make sure to specify key points of contact for engagement with your constituents.
- ✓ Highlight why this work is important for both your clients and organization. Refer to the introduction for talking points.

### Identify a Point Person

Finding a staff member to spearhead and organize your voter engagement activities is key to your success. Ideally the point person should be someone who cares about voter engagement efforts. He or she must also have the time and the desire to boost voting and civic participation in your community and among your staff.

- ✓ Determine who on your staff is best suited to lead your voter engagement efforts. This could be a program or public policy staff person, or a direct service provider.

### Keep It Simple

Your first priority is the services you provide and issues you promote. But by leveraging existing points of contact with the community, any nonprofit can conduct successful voter engagement outreach.

- ✓ Match your voter participation activities to your nonprofit's mission and capacity.
- ✓ Focus your efforts on higher profile national "or statewide elections and those that will most affect your organization.

### Plan Around Election Deadlines

The two months prior to an election are the most important in any voter engagement effort. When creating your plan over the summer, keep in mind that you will want to intensify your efforts in September and October.

- ✓ In September, focus on voter registration and voter education.
- ✓ In October, continue your voter education efforts, host an election event, and encourage people to vote.

**"The weeks closest to the election are the most important for voter engagement work. Planning ahead will make your election time activities more effective."**

### It Adds Up

The nonprofit sector is very large. When taken to scale, even the smallest measures we take to encourage people to register and vote on Election Day will add up.

- ✓ Whether you help one person vote, drive ten people to the polls, or register one hundred voters, it adds up.

## What to Plan

### 1. Who's Involved

Determine who should be involved, such as staff, volunteers, constituents, and partner organizations. Consider:

- Front office staff who do intake or manage materials and signage in the lobby.
- Volunteers or interns who can take on a voter participation activity as a special project.
- Program staff who can weave voting into ongoing program activities.
- Your communications team in charge of your website and communications.
- Partners — collaborate with another agency, a separate branch of your organization, a coalition you're a member of, or your local elections board to broaden your efforts.

### 2. Who's Your Audience

Consider the various audiences for your voter participation activities and communications. The activities, messages, and format of the communications you choose may change depending on your audience, including:

- Your service population or constituents,
- Your staff, board members and volunteers, or
- Your neighborhood or local community.

### 3. What Are Your Communication Vehicles

Plan with the people in charge of your communications and website to include messages and announcements about voting in the weeks leading up to the election. Depending on how you reach your audience some of these may be more effective than others:

- Website,
- Staff meetings,
- Printed and electronic newsletters,
- Social media,
- Signage and posters, and
- Information and handouts in your lobby.

### 4. Which Activities and Services Will



### Incorporate Voting

Choose activities and services to incorporate conversations about voting, such as —

- Point of service,
- Classes and trainings,
- Meetings, and
- Community events.

### EDUCATE YOURSELF.

Learn about conducting voter participation activities and voting in your state. Visit [www.nonprofitvote.org](http://www.nonprofitvote.org) to:

- Register for an upcoming webinar training or view a PowerPoint presentation.
- Watch past webinars on our YouTube channel: [www.youtube.com/NonprofitVOTE](http://www.youtube.com/NonprofitVOTE)
- View or download toolkits, checklists, and factsheets.
- Use our 50-state online guide to "Voting in Your State."



# Voter Registration

## Principles

### Focus on the Month before the Deadline

Studies have found that more people register closer to the deadline and that voters who register nearer to the election are more likely to vote.

- ✓ Plan ahead to conduct your most active voter registration in the weeks before your state's deadline.
- ✓ Simultaneously promote voter registration in your communications and with signage in your office.



**“Voter registration is a first step. Encouraging registered voters to vote remains the key goal. Give your highest priority to voter education and helping your community turn out and vote.”**

### Decide Your Approach

Not all nonprofits are suited or equipped to do voter registration. Some organizations prefer to simply promote registration by providing details on how to register and reminders of upcoming deadlines. If you don't have the capacity to conduct registration in-house, consider inviting an outside organization to visit your facilities and register your clients.

- ✓ Decide what approach will work best for your nonprofit using the guidelines on the next page.

### Know What to Expect

Manage your expectations for registering voters. Many people are already registered, especially following a high-profile presidential election. Some people are not yet citizens and are therefore ineligible to vote.

- ✓ Many registered voters, especially in communities served by nonprofits, move frequently. You can remind them that they need to re-register to vote at their new address.

### Understand Voter Registration in Your State

Every state has its own voter registration procedures. States have varying deadlines, along with different ways to obtain, fill out, and return forms.

- ✓ Use our online “Voting in Your State” tool to find state-specific registration requirements, deadlines, and additional information.
- ✓ Download Nonprofit VOTE's *Voter Registration Toolkit for Nonprofits and Social Service Agencies*.

## Activities

Every year, thousands of potential voters are disenfranchised simply because they miss the registration deadline or don't remember to re-register when they move. Your nonprofit can increase voter and civic engagement in your community simply by helping the people you serve register to vote.

There are different levels of voter registration activities. Consider the capacity and mission of your organization, as well as the character of your relationships and interactions with clients when planning what type(s) of voter registration activities to conduct.

### Level One: Publicize and Promote

Promote voter registration deadlines and how-to's in the weeks before the election.

- Announce registration deadlines and offer details on how to register to vote at events, in newsletters, and on your website.
- Talk about registering to vote at a staff or board meeting. Ask new staff if they are registered to vote.
- Put up posters advertising voter registration deadlines, along with where to acquire and return voter registration forms.

### Level Two: Conduct on-Site Registration

Incorporate voter registration into your ongoing activities and constituent interactions.

- Include a voter registration form in the paperwork for all new hires.

- Assign a staff member to plan and direct voter registration activities. Train staff on how to conduct voter registration using materials from our website and resources from your local elections office.
- Make voter registration forms widely available and offer new clients the opportunity to register during intake.
- Designate a staff person to promptly return forms to your local elections office in person once a week.
- Set up a space in your lobby with voter registration cards, instructions, and a drop box for completed registrations. Provide a sample registration form highlighting all the required fields.

### Level Three: Mobilize and Partner

If you have the time and resources, extend your registration efforts outside your agency to the community you serve.

- Identify partners in your neighborhood or service area and encourage them to register voters – like other nonprofits, libraries, schools, or small businesses.
- Have staff or volunteers set up a voter registration table at community events or highly-trafficked areas. Good locations are where likely voters from the neighborhood congregate – supermarkets, stores, school events, places of worship, transit stops, etc.
- Bonus: Voter registration tabling is a great opportunity to educate people about your organization!

### BUSY SITES WORK BEST

We don't recommend going door-to-door to register voters – unless it is combined with canvassing for another purpose. Too many people aren't home, aren't eligible to vote, or are already registered. It's more cost-effective to register people at your nonprofit or in busy public places frequented by people from your neighborhood, like grocery stores and libraries.



# Voter Education

## Principles

An educated voter is a likely voter. Nonprofits are excellent conduits for voter education information, because voting takes:

### Knowledge About the Voting Process

Many registered voters still lack the confidence and knowledge to take the time to vote in an election. Nonprofits are trusted messengers that can help voters with the when, where, and how of voting.

- ✓ Voters will often spread their knowledge to family, friends, and neighbors.

### Confidence about Casting a Ballot

One reason people don't vote is a fear of failure. No one wants to feel unsure of what is on the ballot or where or how to vote. Voting once creates familiarity which makes it easier to become a repeat voter.

- ✓ Voters have greater confidence when they know who the candidates are in at least one key race, or something about what issues are on the ballot.

### Urgency and Importance

Above all, voters want a reason to vote. Research demonstrates that voters are much more likely to vote when they sense something is at stake. These voters not only believe that their vote will make a difference, but they also believe that the votes of their peers and community will have an impact as well.

- ✓ The urgency and importance your nonprofit communicates will make a difference in how your staff and constituents view voting.
- ✓ Help your staff and constituents make a connection to what's on the ballot and how it can impact their lives.



**“After voting once, it is easier to become a repeat voter.”**

#### WHAT NEW VOTERS WANT

Research conducted by California Easy Voter Guide dispelled common myths about why people don't vote. People are interested in participating, but many first-time voters are uncertain about what will happen at their polling place and are intimidated by the process. New voters are looking for:

- Reasons *why* to vote, from a peer perspective.
- Help with, or training on, *how* to vote.
- Basic information about *what* is on the ballot, choosing a party, and types of elected officials

Your organization is in a position to help voters overcome these barriers and instill a lifelong habit of voting.

## Activities

### VOTER EDUCATION ON THE VOTING PROCESS

#### Promote the When, Where, and How of Voting

Use your in-person contacts and communications to promote the when, where, and how of voting.

##### When

- Election date
- Deadline to vote early by mail or in-person
- Polling hours

##### Where

- Polling places
- Early voting locations

##### How

- How to vote absentee or early in-person
- Where to get help voting
- ID needed, especially for first time voters or states with stricter requirements

#### Include Lessons About Voting

Does your nonprofit have classes and trainings? As a trusted source of information, your group activities are a great vehicle for promoting knowledge on the voting process — especially for younger voters and new citizens.

##### Sample classroom activities

- Hold a mock election at your nonprofit or a neighborhood school.
- Teach voting vocabulary words.
- Discuss the principles of a fair democracy or fair election.
- Pass out voter registration forms or sample ballots.
- Cover the specifics for your area — what races are on the ballot, how to vote, polling place locations, and ballot measures.

#### Design Special Educational Activities

Depending on who you serve, there are many approaches to voter education.

- Hold a special event about the election for one of your programs. (Serve food!)
- Discuss the election with non-citizens and develop ways they can participate as volunteers.
- Make sure ex-offenders understand their voting rights in your state.



**“Helping a new voter learn where to vote, when to vote, and how to vote increases turnout.”**



# Voter Education

## VOTER EDUCATION ON CANDIDATES AND BALLOT MEASURES

### Display or Distribute Sample Ballots

Seeing a sample ballot helps voters familiarize themselves with the voting process, giving them greater confidence to cast an actual ballot on Election Day. Print out copies of sample ballots, post them in your lobby, and make them available in waiting rooms and intake areas.

#### Where to find sample ballots

- Your state elections website
- Your local elections website
- Local newspapers

### Candidate Questionnaires

Candidate questionnaires give your community members the opportunity to hear from the candidates on issues that matter to your organization. Additionally, candidate questionnaires are a great way to engage the candidates and let them know that your organization is interested and attentive to their positions. Ensure your questionnaire remains nonpartisan by following these basic guidelines:

- Cover a broad range of issues in your questions.
- Make sure the questions are clear and unbiased.
- Distribute the questionnaire to every candidate in the race.
- Give candidates a reasonable time period to respond, and try to make sure that each major candidate has responded. Don't be afraid to follow up!
- If a candidate does not respond, write "Did Not Respond" under their name. Do not leave them out of the printed responses, or fill in their issue positions from external sources.
- Plan to promote their answers to all constituents and partners.

#### TIP

Candidates are asked to respond to many questionnaires. Make your questionnaire a priority by co-sponsoring it with a coalition or other organizations. Build in time to follow up with candidates and broadcast their responses.

### Distribute Nonpartisan Voter Guides to Your Community Members

Nonpartisan candidate guides can be great documents to have on hand in your lobby or service area. Not only do they provide an important, unbiased overview of what your community will be voting on, but they can also be taken home by clients and shared and circulated among family and friends. Some voter guides may also be released in multiple languages.

#### Where to find candidate guides

- Some state elections websites have official guides.
- Nonpartisan organizations like the League of Women Voters or Smart Voter (CA).
- Issue coalitions in your area may produce candidate guides for their members.



### Distribute Ballot Measure Guides

Ballot measures are about laws or constitutional amendments, not candidate elections. You may advocate for or against a ballot measure as a lobbying activity. You may also choose to distribute nonpartisan information on ballot measures as a nonpartisan voter education activity.

#### Take a position

- Sign onto a coalition or a public statement advocating a "yes" or "no" vote.
- Pass out materials to your constituents explaining why to vote "yes" or "no" on a ballot measure.
- Report advocacy expenditures, if any, as a lobbying activity subject to normal limits on lobbying.
- If your nonprofit lobbies, you should file the 501(h) Election with the IRS to standardize lobbying reporting on your 990, including a clear guideline for lobbying spending.

**Distribute neutral voter guides on ballot measures that explain the measures but don't take a position for or against passage.**

- Find a neutral ballot measure guide that discusses what happens if the measure does or doesn't pass. You can often find nonpartisan ballot measure guides from the same sources that produce candidate guides.
- Remember, nonpartisan voter guides are education, not lobbying. There are no financial or time restrictions on a 501(c)(3)'s nonpartisan ballot measure education activities.

**WANT TO CREATE YOUR OWN CANDIDATE OR BALLOT MEASURE GUIDE?**

Use these resources to craft a nonpartisan guide:

- "Candidate Questionnaires and Voter Guides," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)
- Use the materials produced by Easy Voter Guide ([www.easyvoterguide.org](http://www.easyvoterguide.org)) as a model. They have been creating nonpartisan voter guides in multiple languages since 1994.

**Sponsor or Promote a Candidate Forum**

Sponsoring and promoting candidate forums or debates makes your nonprofit a player. It connects you to candidates, increases your status as a policy expert, and helps you gain access to elected officials after the election. Additionally, a forum is a great opportunity to allow your community members to hear directly from candidates on the issues that matter to them.

**Some options include:**

- Co-sponsoring a candidate forum with other nonprofits.
- Advertising a forum sponsored by others.
- Holding a debate watching party.

For more on conducting a candidate forum, visit [www.nonprofitvote.org](http://www.nonprofitvote.org), where you will find online and print resources including:

- *A Nonprofit's Guide to Hosting a Candidate Forum*
- "Conducting a Candidate Forum," an online training





## Principles

The chief goal of get-out-the-vote activities is to encourage new or infrequent voters to participate. People are more likely to vote when they have been contacted by someone they know or when they seek or receive help in the voting process.

### Make It Personal

Voter mobilization research shows that people are more likely to participate when they are personally contacted by someone they know. People are especially responsive to appeals from a friend, neighbor, or a community-based agency that they know and trust.

- ✓ Look for opportunities to create conversations about voting at your point of service, in meetings, on the phone, or during trainings or events. Outreach is more effective when it does not rely solely on handouts or mass emails.

### Give Voters the Help They Need

Newer voters can let small things keep them from the polls. Not knowing polling place hours, where to vote if they've just moved, or what kind of identification is necessary can all create barriers to participation.

- ✓ Nonprofits have experience referring people to services and know how to find or offer assistance with such tasks, like casting a ballot.

### Turn Up the (Nonpartisan) Volume

In the final days before an election, potential voters may be turned off by overly partisan campaigns, or find other reasons not to participate. Nonprofits can use their nonpartisanship and credibility to reinforce the importance and urgency of voting in a way that will increase turnout.

- ✓ Potential voters start to pay more attention to voting in the final weeks before an election. During this period your strong endorsement of voting will affect whether or not they participate.

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### Positive Messaging

Negative messages like “If you don’t vote, don’t complain” or calls to civic duty without other information about the election can be confusing and counterproductive. Use positive messages that encourage people to vote by connecting the election back to your community’s future and your organization’s issues.

**“People are more likely to participate when they are personally contacted by someone they know.”**

## Activities

### *In the last two weeks...*

#### Create Visibility

Your signs, displays, and messages on the election should be visible to everyone who walks into your agency or attends any of your trainings or events.

- Place voting and election signage — posters, flyers, etc. — throughout the lobby and all public spaces.
- Make announcements or hold discussions at meetings, events, classes, etc.
- Encourage popular local media outlets to promote both the election and places where voters can go to find help.

#### Provide Help

Help your constituents succeed in voting. Voting just once increases the likelihood that they will follow issues and participate in community affairs after the election.

- Instruct staff on how to answer basic election questions, including where a voter can get help voting.
- When providing services, ask people if they're planning to vote and if they need help.
- Work with your 2-1-1 human service help line to have them answer basic voting-related questions, like how to find polling places or check a voter's registration status.
- Advertise rides to the polls or where to get help.
- With help from volunteers, call a list of your constituents and remind them to vote on Election Day.

#### Raise the Stakes

The urgency and importance you communicate in the last two weeks will make your constituents more likely to take time to vote.

- Use all your methods of communications — in-person, online, and otherwise.
- Do more to tie the election to a specific issue and the future of your organization and community.
- Provide translated information and materials, when possible.



#### On Election Day

Make Election Day special. Treat it as a day of political importance and a time to celebrate democracy.

- Allow staff to spend part or all of Election Day doing nonpartisan get-out-the-vote activities.
- Encourage your staff and volunteers to sign up as poll workers or translators.
- Ask everyone you connect with if they've voted or need help voting.
- Hang prominent "Vote Today" signs with a number to call or place to go for help.
- Have an Election Day party!

#### EARLY VOTING

Early voting is growing rapidly. Nearly one out of every three ballots was cast early in 2008, either in-person or by mail. A similar number of voters voted early in the 2010 midterm, a 10% jump from 2006. Your nonprofit should be prepared to help voters find their early voting site or assist them in requesting an absentee ballot. Use our "Voting in Your State" online tool to learn more about early voting options in your state.



## FOR 501(C)(3) ORGANIZATIONS

### **A 501(c)(3) organization may NOT conduct *partisan* activities to support or oppose any candidate for public office, including:**

- Endorsing a candidate.
- Making a contribution to, or expenditure for, a candidate.
- Rating candidates on who is most favorable to your issue(s).
- Letting candidates use the organization's facilities or resources, unless those resources are made equally available to all candidates at their fair market value.

### **There is a wide range of *nonpartisan* activities 501(c)(3) nonprofits may do to encourage voter participation and promote voter education.**

1. Promote or Conduct Voter Registration
2. Educate Voters on the Where, When, and How of Voting
3. Encourage and Remind People to Vote
4. Encourage Staff to Serve on Election Day as a Poll Worker, Translator, or other Nonpartisan Volunteer
5. Distribute Nonpartisan Sample Ballots, Candidate Questionnaires, or Voter Guides
6. Host or Co-Sponsor a Candidate Forum
7. Hold a Voter Education Event
8. Educate the Candidates on Your Issues
9. Continue Issue Advocacy During an Election
10. Support or Oppose Ballot Measures as a Lobbying Activity (subject to normal lobbying limits)

### **Learn more**

Nonprofit VOTE's *Nonprofits, Voting and Elections: A guide to nonpartisan voter engagement for 501(c)(3) nonprofit organizations* is available as an online guide, a narrated presentation, or as a downloadable PDF in English and Spanish.

The guide also provides links to nonprofit election resources from the IRS, Alliance for Justice, and others.

**“Charities are allowed to conduct nonpartisan activities that educate the public and help them participate in the electoral process (such as) voter education, voter registration and get-out-the-vote drives and candidate forums.”**

**—IRS office of Exempt Organizations**

Nonprofit employees often have questions about their personal involvement in political campaigns or work with candidates. Outside of work, nonprofit staff are free to volunteer for candidate campaigns or engage in other partisan political activities. However, it is important to make clear distinctions between personal and professional efforts, as all voter engagement activities on behalf of your nonprofit must remain completely nonpartisan.

### Q: When is it personal time?

A: Outside of normal work hours, nonprofit staff may engage in partisan activities, like supporting a candidate for office. Staff may also take vacation or personal time for the purpose of engaging in political activity.



### Q: Can staff be identified with their nonprofit organization when supporting a candidate?

A: Nonprofit staff members may identify their place of employment at a political event. However staff members who are spokespeople for their organization or are otherwise visibly associated with it, should emphasize that they are in attendance as a private citizen and not on behalf of the organization they work for.

### Q. Can staff be listed as a supporter of a candidate with the name of the organization?

A: As a rule, it is safer to leave the name of the organization off of any partisan political materials. However, it is permissible to list the organization along with the staff member's name if it is clearly stated that the organization is listed "for identification purposes only."

### Q: What about board members and volunteers?

A: While representing the nonprofit organization, board members and volunteers should follow the same protocol outlined for staff members.

### Q: What if a candidate lists the name of the Executive Director or another employee without their permission?

A: If a candidate lists the Executive Director or any staff member along with the nonprofit's name on campaign material without the appropriate disclaimer (e.g. "for identification purposes only") the organization is not at fault. Ask the campaign to remove your organization's name from the list, and be sure to save a copy of your email or written request for your files.

### SEPARATE YOUR PERSONAL POLITICAL PARTICIPATION FROM YOUR NONPROFIT WORK

- Provide political campaigns and candidates with a personal phone number, email address, and times to call you outside of your work hours.
- Don't use any of your organization's resources to support or oppose a candidate — like organizational vehicles, copy machines, paper, supplies, etc.

Nonprofit organizations, themselves, may offer certain resources to candidates — e.g. space or phones — but only if publicly available to all candidates in a race at their fair market rental value.

### Learn more

- "Election Activities of Individuals Associated with 501(c)(3) Organizations," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)
- "What Nonprofit Staff Can Do: Voter Engagement at Work and Off the Clock" webinar and PowerPoint presentation, Nonprofit VOTE, [www.nonprofitvote.org](http://www.nonprofitvote.org)

# Nonprofits & Ballot Measures



## What is a ballot measure?

Ballot measures ask voters to vote on laws, bonding issues, or constitutional amendments. If the vote is on a proposed law, it's called a "ballot initiative". If the vote is on a law already passed by the legislature, it's called a "referendum".

## How are ballot measures different from candidate elections?

**The IRS considers activity on ballot measures lobbying – not electioneering.** Ballot measure advocacy is an attempt to influence the passage or defeat of a law or constitutional amendment – not the election or defeat of a candidate – and is therefore not partisan in nature. As a result, 501(c)(3) organizations may engage the public on any ballot measure.

## How can nonprofits work on ballot measures?

There are two ways to engage your community around ballot measures:

- 1. Provide nonpartisan education.** Your organization can distribute neutral educational materials designed to inform the public about both sides of the question. This is simply a voter education activity, and as such it is neither lobbying nor electioneering. There is no limit on the amount of voter education your nonprofit may conduct in regard to a ballot measure.
- 2. Take a stand.** Your nonprofit can advocate for a "yes" or "no" vote on a particular issue, up to normal lobbying limits. Your organization can engage in a range of activities in support of or opposition to any ballot measure—such as making an endorsement, communicating your position to constituents and the public, organizing volunteers to work on the measure, or hosting a forum or event. Keep in mind that if your organization does engage in ballot measure advocacy (as opposed to education), you will be subject to 501(c)(3) lobbying limits.

## What are the 501(c)(3) lobbying limits for ballot measures?

Your lobbying limits depend on which test your non-

profit chooses to measure its lobbying.

1. If your nonprofit has elected to measure lobbying under the 501(h) expenditure test (highly recommended!), you will have clearer guidance and can do more lobbying. Under this test, you can spend as much as 20% of your annual budget on lobbying, including influencing ballot questions or legislation.
2. If your 501(c)(3) has not filed the 501(h) form, its lobbying falls under the "insubstantial part test." In this case, you may only spend what is an "insubstantial" amount of money on lobbying efforts. "Insubstantial" is not clearly defined.

## How does my nonprofit select the 501(h) lobbying expenditure test?

**File a one-page, one-time form with the IRS - Form 5768.** Once submitted and approved your nonprofit has higher and more clearly defined lobbying limits. It includes annual reporting of expenditures on your Form 990.

## What about disclosure of spending on ballot measures under state campaign finance laws?

**Some states ask anyone spending more than a certain amount on a ballot measure to file a disclosure report.** States do not limit your spending on ballot measures, but may ask individuals, organizations, or others to file disclosure reports with a state or local campaign finance office. For more information, contact your state's campaign finance office.

## Learn more

- "501(c)(3) Public Charities and Ballot Measures," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)
- "Maximize Your Lobbying Limit: Elect to Measure Your Lobbying Using the 501(h) Expenditure Test," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)
- "The Powerful, Free, and Easy 501(h) Election: Benefits Galore!" National Council of Nonprofits, [www.councilofnonprofits.org](http://www.councilofnonprofits.org)



### ON A NONPARTISAN BASIS

Elections offer numerous opportunities to interact with candidates for elected office. As a 501(c)(3) organization, you cannot endorse or oppose candidates for public office. However, you can still use campaigns to get your issues in front of the candidates, build relationships with future elected officials, share your policy ideas, and influence future debates and decisions. Consider how your nonprofit can connect to candidates in various races during an election season.

#### 1. **Host or Co-Sponsor a Candidate Forum**

**Candidate forums not only connect your organization with candidates, but they also give your constituents and community members a chance to meet and interact with future officials.** Hosting a candidate forum can raise the profile of your nonprofit and highlight your issues during the election cycle.

- ✓ *A Nonprofit's Guide to Hosting a Candidate Forum*, Nonprofit VOTE
- ✓ *Nonprofits, Voting and Elections*, Nonprofit VOTE

#### 2. **Have a Candidate Attend an Event**

**Invite candidates to visit your nonprofit or attend an event**, as the invitation alone gets your organization's name in front of the candidates. Hosting candidates at an event also allows your constituents and stakeholders to ask questions and familiarize themselves with their choices.

- ✓ "Candidate Appearances" factsheet, Nonprofit VOTE

#### 3. **Conduct a Candidate Questionnaire**

**Candidate questionnaires let candidates--and the public--know what issues you care about.** Invite all of the candidates in a particular race to respond to a set of questions. Once you've collected responses, be sure to publicize them on your website and in your communications. Many candidates are often short on time and are fielding many requests, so consider collaborating with a partner or coalition to consolidate your efforts and increase the likelihood that candidates will reply.

- ✓ *Nonprofits, Voting and Elections*, Nonprofit VOTE
- ✓ "Candidate Questionnaires and Voter Guides," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)

#### 4. **Share Your Policy Ideas**

**Although elected officials can benefit from your ideas and research year-round, elections provide a focused opportunity to build clout while demonstrating your organization's expertise.** During the campaign, candidates need current research and fresh ideas to answer questions and connect with voters. Sharing your policy ideas with candidates can help forward your mission, but be sure to make your ideas and existing research available to all candidates.

- ✓ *Nonprofits, Voting and Elections*, Nonprofit VOTE

#### 5. **Attend Candidate Events**

**Don't be shy! Attend candidate events and feel free to ask questions.** However, if you are representing your organization, your approach must be strictly nonpartisan — e.g. You must ask the same question at events for all candidates in the same race.

- ✓ "What Nonprofit Staff Can Do" factsheet, Nonprofit VOTE

#### 6. **Set up a 501(c)(4) Organization**

**Nonprofits who do more legislative advocacy often establish a related 501(c)(4) organization.** 501(c)(4) organizations may do an unlimited amount of lobbying. They may also engage in partisan election activity so long as election work is secondary to its primary purpose. Donors to a 501(c)(4) organization do not get a tax deduction.

- ✓ "Types of Exempt Organizations and What They May Do," Bolder Advocacy (Alliance for Justice), [www.bolderadvocacy.org](http://www.bolderadvocacy.org)
- ✓ "Social Welfare Organizations-501(c)(4)s," IRS, [www.irs.gov](http://www.irs.gov)



# Be a Poll Worker

Poll workers are on the front lines of helping people vote on Election Day. Encourage staff, volunteers, and constituents to facilitate democracy in your community by serving as poll workers.



## ☐ Volunteer as a Poll worker

Contact your local elections office directly for application information. Use our online “Voting in Your State” tool to learn more about poll worker requirements in your state and to find your local elections office.

## ☐ Job Description

Poll Workers ensure the conduct of fair and accurate elections. They set up and prepare the polling location, greet voters, verify registrants, and issue ballots. Poll workers demonstrate how voting equipment works and explain voting procedures. At the end of the day, they close the precinct and prepare materials for delivery to the elections office.

## ☐ When to Apply

It is best to apply 1-3 months before the election. However some areas with high need continue to take applications up until the week before Election Day.

## ☐ Hours and Pay

Compensation varies depending on the jurisdiction and duties, but poll workers generally receive stipends of around \$100 or more. It’s a long, but rewarding day —shifts can last 12 hours or more, from before the polling site opens until after it closes (with occasional breaks). Some states do offer half day shifts.

## ☐ Qualifications

Poll workers are generally required to be a registered voter in the precinct or county where they are serving. However, an increasing number of areas are developing programs that allow high school and college students to assist at the polls. Contact your local elections office for details.

## ☐ Poll Worker Training

Before Election Day, you will likely be required to attend a training session. Some jurisdictions offer online curriculum in lieu of, or to complement, in-person instruction. Training time is often compensated, conditional upon actual service on Election Day.

## ☐ Remember Your Vote!

If you are not scheduled to work at your own polling place you should plan to request and cast an absentee ballot.

## Learn More

- “Voting in Your State” online tool, Nonprofit VOTE, [www.nonprofitvote.org](http://www.nonprofitvote.org)
- “Compendium of State Poll Worker Requirements,” U.S. Election Assistance Commission, [www.eac.gov](http://www.eac.gov)

## TRANSLATORS NEEDED!

In many areas, paid translators are needed to assist non-English speaking voters by translating voting information and answering voters’ questions. In some jurisdictions translators may be called upon to assist non-English and limited-English speaking voters in voting booths.

*Nonprofit VOTE is an official voter participation partner of the National Association of Secretaries of State.*



## Voter Registration

(ex: Publicize the deadline and how to register. Actively conduct registration or have a youth group table at a busy neighborhood location. See pages 8-9 for more.)

Staff or volunteers involved \_\_\_\_\_

\_\_\_\_\_

Target Audience (Staff, constituents/clients, surrounding neighborhood, parents of children served) \_\_\_\_\_

\_\_\_\_\_

Communication and Event opportunities (Newsletters, social media, conference, annual event) \_\_\_\_\_

\_\_\_\_\_

Points of Service/Programs (Service delivery or intake, regular trainings or classes) \_\_\_\_\_

\_\_\_\_\_



## Voter Education

(ex: Include a discussion of voting in a class or training. Co-sponsor a candidate or voter education event. Hang a sample ballot or poster with the election date and where to get help voting. See pages 10-13 for more.)

Staff or volunteers involved \_\_\_\_\_

\_\_\_\_\_

Target Audience (Staff, constituents/clients, surrounding neighborhood, parents of children served) \_\_\_\_\_

\_\_\_\_\_

Communication and Event opportunities (Newsletters, social media, conference, annual event) \_\_\_\_\_

\_\_\_\_\_

Points of Service/Programs (Service delivery or intake, regular trainings or classes) \_\_\_\_\_

\_\_\_\_\_

# Making a Plan Worksheet



## Get-Out-the-Vote

(ex: Ask people if they're planning to vote or need help voting. Remind voters about early in-person and vote-by-mail opportunities. Design Election Day reminders and celebrations! See pages 14-15 for more.)

Staff or volunteers involved \_\_\_\_\_

Target Audience (Staff, constituents/clients, surrounding neighborhood, parents of children served) \_\_\_\_\_

Communication and Event opportunities (Newsletters, social media, conference, annual event) \_\_\_\_\_

Points of Service/Programs (Service delivery or intake, regular trainings or classes) \_\_\_\_\_

## Election Day

(ex: Give staff time off to vote and create Election Day visibility throughout the organization. See page 15 for more.)



Staff or volunteers involved \_\_\_\_\_

Target Audience (Staff, constituents/clients, surrounding neighborhood, parents of children served) \_\_\_\_\_

Communication and Event opportunities (Newsletters, social media, conference, annual event) \_\_\_\_\_

Points of Service/Programs (Service delivery or intake, regular trainings or classes) \_\_\_\_\_

# Nonprofit VOTE Resources

[www.nonprofitvote.org](http://www.nonprofitvote.org)

## Guides and Toolkits

- *A Voter Registration Toolkit for Nonprofits and Social Service Agencies*
- *A Voter Participation Starter Kit for Nonprofits and Social Service Agencies*
- *A Nonprofit's Guide to Hosting a Candidate Forum*
- *Nonprofits, Voting and Elections: A Guide to Nonpartisan Voter Engagement for 501(c)(3) Nonprofit Organizations*
- Online Guides to Registering and Voting in Your State

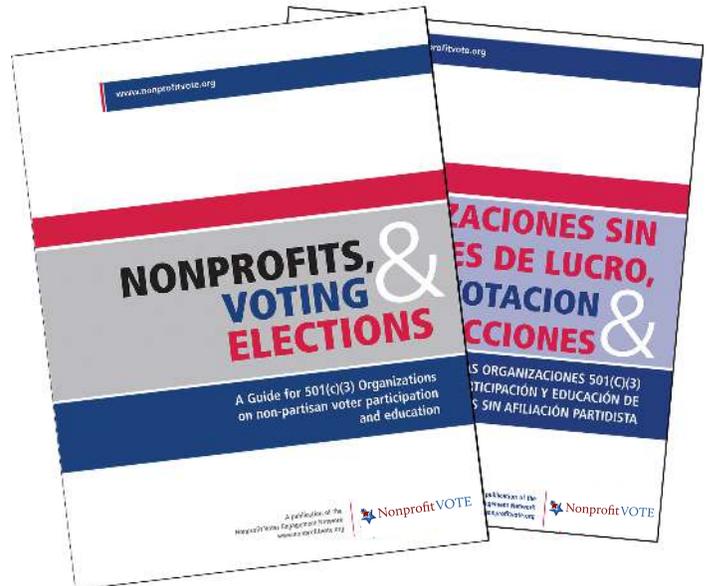
## Webinar Series

[www.nonprofitvote.org/webinar-series.html](http://www.nonprofitvote.org/webinar-series.html)

- Ready, Set, Register: Nonprofit Voter Registration
- Think Locally: The Value of Municipal and Local Elections
- Plan Ahead: Creating a Voter Engagement Plan for your Nonprofit
- Taking a Stand: Ballot Measure Advocacy for Nonprofits
- Being Nonpartisan: Guidelines for 501(c)(3) Nonprofits
- Engage Candidates and Build Clout: How to Host a Candidate Forum
- Nonpartisan Voter Participation Basics for Nonprofits
- Nonprofits Get Out the Vote: Countdown to Election Day
- What Nonprofit Staff Can('t) Do

## Factsheets

- 501(c)(3) Permissible Activities
- Nonprofits and Ballot Measures
- What Nonprofit Staff Can Do
- State Felon Disenfranchisement Laws
- Working with Candidates
- Election Day Registration
- Be a Pollworker
- Federal Funds and Voter Participation
- Expanding Voter Registration Opportunities
- Nonprofits Increase Voting: Findings from a Nonprofit Voter Mobilization Experiment



## Checklists

- Getting Started With Voter Engagement
- Seven Reasons to Do Voter Registration at Your Nonprofit
- Seven Principles of Getting Out the Vote
- 10 Things to Do Before Election Day

## Posters and Other Materials

- Register to Vote poster in English and Spanish
- Get-Out-the-Vote poster
- Voting in Your State Web Badges

## America Goes to the Polls Series

- A Report on Voter Turnout in the 2012 Election
- A Report on Voter Turnout in the 2010 Election
- Voting Gaps in the 2010 Election
- A Report on Voter Turnout in the 2008 Election
- Voting Gaps in the 2008 Election
- A Report on Voter Turnout in the 2006 Election



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