



Making a Plan for Voter Engagement Checklist and Worksheet

Before you begin, think about why this work is important to you and your organization and the impact that you want to have in your community. This tool (and the attached timeline worksheet) will guide you through the big picture questions and planning steps necessary to ensure your voter engagement work contributes to a more equitable democracy including assessing capacity, building knowledge of state and local voting information, and considerations for planning activities.

Why should nonprofits do voter engagement?

- Research shows that when nonprofits engage voters, they are more than 10 percentage points more likely to follow through and vote (<https://www.nonprofitvote.org/nonprofit-power-report/>).
- Nonprofit voter engagement benefits both an equitable democracy and builds momentum toward your nonprofit's mission.
- It engages new audiences, builds trust within your community, and empowers your community by promoting a more civically engaged and active community.

Step A: Assess capacity

1. Get buy-in from your Executive Director, board, or other leadership. Be prepared to share a “Why” that explains the value of creating a voter engagement plan for your organization. Tie it to the mission, strategic plan, or other organizational goals.

Community Benefits	Organizational Benefits
<ul style="list-style-type: none"> • Provide clients with nonpartisan resources about voting they might not get elsewhere • Invite them to participate in local civic opportunities • Build client tech literacy around accessing information • Providing staff/volunteer leadership/professional development opportunities • Increasing staff/client voting rates • Increases visibility for voter engagement 	<ul style="list-style-type: none"> • Build influence with elected officials • Foster an environment where conversations about voting feel safe, fun, positive, and accessible • Have multiple staff or departments participate and interact • Build and strengthen community partnerships • Pilot/test out the impact of including voter education alongside existing services • Strengthens existing organizational advocacy efforts • Builds greater awareness of systems that contribute to barriers faced by community
Others:	Others:



- Choose a staff lead who can involve and motivate other staff and volunteers, as well as clients and participants.

Voter Engagement Lead 1:	
Voter Engagement Lead 2:	

- Identify assistance and resources from a community partner and your local elections office. Consider community partners you might want to deepen partnerships with, including organizations who serve the same area or whose work aligns with your mission. Consider funders or sponsors who might already be doing this work.

Organization Name(s)	Contact Name	Contact Email	Contact Phone
<i>Local Election Office</i>			

- Pick a time and setting to bring this idea to your team and/or leadership. Consider any specific organizational dynamics, procedures, or protocol.

When (Choose all that apply):	Next 1:1 meeting Staff Meeting Board meeting Other:	Date:
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Step B: Build relevant KNOWLEDGE

1. Understand the guidelines for 501(c)(3)s on how to stay nonpartisan
 - [Check out Nonprofit VOTE's Guide to Staying Nonpartisan webinar and resources](#)
 - Review [Nonprofit VOTE's Permissible Election Activities Checklist](#)
 - If you have organizationally specific legal questions, check out the assistance line from [Alliance For Justice/Bolder Advocacy](#) or consult your organization's legal counsel.

2. Learn about voting in your state– important dates, how to register, early voting options including what's on the ballot in your locality and state for the upcoming election (*Hot Take: there's more to voting than just presidential elections!*)
 - [Check out Nonprofit VOTE's Voting in Your State tool](#) and fill in the dates below.
 - Tip: with mail-in ballots, be sure to put in the mail at least a week before election day to allow for mail processing. ([see our blog here about USPS](#))

Election	Election Date(s)	Registration Deadline	Mail Ballot Requests Deadline
Primary(ies)			
Run Off/Special			
General			

3. Begin collecting state-specific links so that you can share them out with community members when needed.

State-specific Resource	Link
State elections office:	
County elections office:	
Where to access sample ballot:	
Where to request mail/absentee ballots:	



Step C: Create informed plans

1. **Choose your target audience** – clients, constituents, staff, your local community, or others. Consider ways to involve the people you serve in your election activities. Think about how your community members could make a connection between your services/mission and voting.

Groups you engage	Strengths	Challenges
<i>Ex. volunteers</i>	<i>Flexible schedules to work after staff hours</i>	<i>Need a volunteer manager or partner organization to train volunteers</i>

2. **Select opportunities for engagement:** as part of daily services, in classes, at trainings or events, as a project for a volunteer group, or incorporated into community outreach.

- a. Below, begin to list what touch points you have during a typical month with your clients or program participants?

Opportunities to share voter information with <u>clients/program participants</u>	
Idea (Ex: people in waiting rooms, client meetings, fundraisers, intake, tabling and outreach)	Approximate Number of people

- b. How do you currently share information, updates and resources with your staff/board/volunteers?

Opportunities to share voter information with <u>staff/board/volunteers</u>	
Idea (Ex: team meetings, all staff meetings, end of day volunteer debrief)	Approximate Number of people



- c. What are simple, ongoing, opportunities to increase visibility that don't require live conversations or consistent staff time?

Opportunities to share voter information through <u>ongoing communications</u>	
Idea (Ex: Set up self-serve table to display key dates cards or posted with QR codes at internal break room or external lobby or waiting room, or post on social media, internal staff/vol and/or client emails)	Approximate Number of people

3. Set Data-informed Goals: For your monthly engagement goal - add up the total number of people you hope to engage from the yellow tables above. No matter what number is in this box, remember that even small numbers can have a large impact.

Total:	
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4. Create a specific timeline for your plan
- Check out Nonprofit VOTE's [Voter Registration and Engagement Timeline](#)
 - Revisit Nonprofit VOTE's [Staying nonpartisan: Permissible Election Activities Checklist](#)
 - Stay tuned to Nonprofit VOTE's resources and webinars to guide you through additional tools and resources at nonprofitvote.org

Step D: Dates and Schedules

1. Look at your organizational calendar and work backwards from election day. Take into consideration major holidays, organizational events, anniversaries, and opportunities for engagement.
2. Use this chart below as a guide. Feel free to modify it as needed.



EXAMPLE Plan for Voter Engagement

Key Dates:

- **Voter Registration Deadline** (online, in-person, or mail): _____
- **Absentee/Mail Ballot Request Deadline** (online, in-person, or mail request): _____
- **Early Voting Period** (including days/hours): _____
- **Election Day:** _____

# Weeks til Election Day	Date	Deadlines/ Important Dates	Theme	Organizational Activities	Notes
6 weeks		Early Voting Starts	Engaging Potential Voters	<i>Ex. Letter from leadership on the importance of voting with information about voting in your region.</i>	<i>Ex. Provide voting information at sign-in table at the organization's annual fundraiser.</i>
5 weeks			Get Vote Ready	<i>Ex. Start incorporating voting trivia or fun facts on internal and/or external communications.</i>	<i>Ex. Pick up some civics content from School House Rock or ed.icivics.org</i>
4 weeks		Registration Deadline	Voter Registration	<i>Ex. Offer opportunity (table in lobby, before or after staff meeting..etc) for staff and/or community to CHECK their voter registration status and provide a treat!</i>	<i>Ex. Reminder: It is unlawful to offer an incentive only to those who register.</i>
3 weeks			Voting By Mail	<i>Ex. Email to all staff and email list with information about voting options (including vote by mail) in your state.</i>	<i>Ex. You can copy and paste content directly from your board of elections website.</i>
2 weeks		Absentee/ Vote By Mail Deadline	What's on Your Ballot?	<i>Ex. Put up reminders in a prominent place encouraging the community to check their polling place and look at their sample ballot.</i>	<i>Ex. Ensure staff have requested their time off to vote. Consider an email to community members with a reminder to vote.</i>
1 week			Get Out the Vote	<i>Ex. Phone or text bank to registered voters in the community confirming their plan to vote.</i>	<i>Ex. Pair with key organizational messages for increased attention.</i>
Election Day!		Election	It's Election Day	<i>Ex. Encourage staff, volunteers, and community members to vote and show their stickers!</i>	<i>Ex. Celebratory banner in prominent place reminding people to vote</i>



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Plan for Voter Engagement at _____ (organization)

Key Dates:

- **Voter Registration Deadline** (Online, Mail, In-Person): _____
- **Absentee Ballot Request:** _____
- **Early Voting:** _____
- **Election Day:** _____

# Weeks til Election Day	Date	Deadlines/ Important Dates	Theme	Organizational Activities	Notes
6 weeks					
5 weeks					
4 weeks					
3 weeks					
2 weeks					
1 week					
Election Day!					