



# **VOTE4** **MentalHealth**

***HOW YOUR NAMI CAN  
ENGAGE CANDIDATES  
AND VOTERS AS  
A NONPROFIT***



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**MentalHealth**

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## **ABOUT NAMI**

NAMI, the National Alliance on Mental Illness, is the nation's largest grassroots mental health organization dedicated to building better lives for the millions of Americans affected by mental illness.

## **ABOUT VOTE4MENTALHEALTH**

Vote4MentalHealth is a campaign led by NAMI, the National Alliance on Mental Illness, to promote nonpartisan voter participation and elevate discussions about mental health policy during the elections. NAMI does not endorse political parties or candidates.

## **ABOUT NONPROFIT VOTE**

Nonprofit VOTE partners with America's nonprofits to help the people they serve participate and vote. Nonprofit VOTE is the largest source of nonpartisan resources to help nonprofits integrate voter engagement into their ongoing activities and services.

**NAMI.org**

**NAMI HelpLine  
800-950-NAMI (6264)**

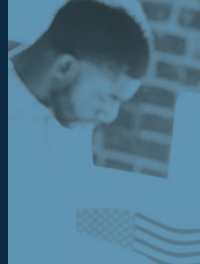
 [@NAMIAdvocacy](https://twitter.com/NAMIAdvocacy)

 [@NAMICommunicate](https://twitter.com/NAMICommunicate)

 [Facebook.com/NAMI](https://www.facebook.com/NAMI)

 [@NAMICommunicate](https://www.instagram.com/NAMICommunicate)

**NAMI  
4301 Wilson Boulevard, Suite 300  
Arlington, VA 22203  
703-524-7600**



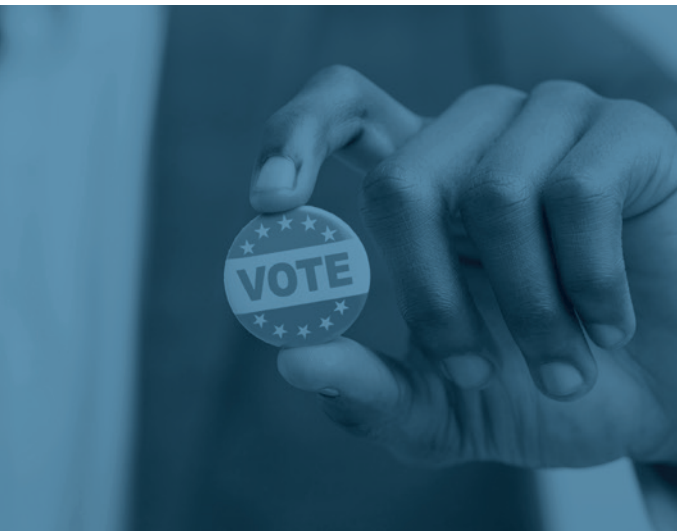

*HOW YOUR NAMI CAN ENGAGE  
CANDIDATES AND VOTERS  
AS A NONPROFIT*

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# USING THIS GUIDE



NAMI, the National Alliance on Mental Illness, worked with Nonprofit VOTE, the organization providing the best nonprofit resources to engage in elections-related activities, to develop this guide for NAMI organizations. This guide is divided into four sections, which include Nonprofit VOTE's resources and guidance, along with examples relevant to your NAMI organization's work.



The first section of this guide is focused on nonpartisanship, defining what your NAMI can and cannot do as a nonprofit organization. The second and third sections provide information about engaging with candidates and engaging voters (respectively). It shares examples of different strategies for conducting voter registration, hosting a candidate forum and more. The fourth section of this guide is an appendix to help you plan and implement the activities outlined in the first three sections.

Throughout the guide there are links to additional resources that you may need during your planning process. State and local laws may apply to voter registration, lobbying or funding for nonprofits, and you should work with your state or local elections board to ensure that you are following all relevant laws in your area. More information about your state can be found at Nonprofit VOTE's Voting in Your State site.<sup>1</sup>

You can also find NAMI-specific resources and checklists at [vote4mentalhealth.org](https://vote4mentalhealth.org), under "Get Involved." This includes template social media content, questions to ask candidates, a candidate forum checklist and more.

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<sup>1</sup> Nonprofit VOTE — Voting In Your State: [nonprofitvote.org/voting-in-your-state/](https://nonprofitvote.org/voting-in-your-state/)

# WHY ELECTION ENGAGEMENT MATTERS TO NAMI



## **A LETTER FROM NAMI'S CHIEF EXECUTIVE OFFICER, DANIEL H. GILLISON, JR.**

Dear NAMI community,

Across the country, millions of Americans cast their ballots to select those who will represent their interests — from the city council to the statehouse to the White House. Those elected policymakers will make decisions that affect you, your loved ones and your communities. Elections matter, which is why it's so vital to #Vote4MentalHealth.

It's more than just pulling a lever or filling in a bubble. Before anyone goes to the polls or mails in their ballot, voters and candidates alike must understand the impact different policies will have on people affected by mental health conditions. From health care to the economy to criminal justice and more, mental health touches many of the issues that voters care about the most. When a person casts their ballot, they #Vote4MentalHealth whether they realize it or not. And if a candidate gets elected to public office, it is critical that they know their constituents demand progress on and support for mental health policy issues.

This is where nonprofits like NAMI organizations play a major role. As leaders in your respective communities, your NAMI is a trusted source for information and support. This trust is what empowers your NAMI to make an impact during the elections — and beyond. Whether this is your first time or your twentieth engaging in nonprofit elections work, we hope this toolkit will help your NAMI engage with voters and candidates in a responsible, but influential, way.

I pledge to #Vote4MentalHealth and I hope you do, too. Together, we can make mental health a top priority for voters and policymakers at all levels of government.

Sincerely,



Daniel H. Gillison, Jr.  
Chief Executive Officer  
NAMI

## REASONS TO ENGAGE IN ELECTIONS

Candidate and voter engagement efforts build stronger nonprofits. When the people a nonprofit represents vote, they have more access to elected officials, increased influence on issues and are better positioned to advance their mission. For NAMI organizations who aim to build better lives for people affected by mental illness, these are important opportunities that help us fulfill our mission.

Nonprofits like NAMI organizations can reach people that are missed by political campaigns, contributing to a more engaged citizenship that better represents the communities we serve. State and local NAMIs are uniquely positioned to reach individuals across the country who are more diverse than the general public, including many groups that are historically left behind or participate in voting at lower rates. Because of our community trust, personal relationships and nonpartisan approach, the individuals that we serve, and those who serve us, are more likely to respond to our appeals to vote.

### Candidate engagement boosts our advocacy.

Candidate engagement gets us a seat at the table and enhances our ongoing advocacy by establishing our knowledge and what we have to offer. When our NAMI communities participate, we build relationships that result in us having more access to policymakers, increased influence for our Alliance and a greater chance to have our issues addressed. Candidate and voter engagement make NAMI even more relevant.

### Voter engagement raises our profile.

Campaigns seek out and respond to communities with higher voter registration and turnout rates and to organizations that care about voting. Candidates are more likely to attend our events, respond to our questions and listen to our concerns if we are actively engaged in the process.

### Engaging candidates makes space for the voice of the people affected by mental illness.

By participating in candidate forums or putting out candidate questionnaires, people become more active and engaged citizens. They learn to ask questions of candidates and to be educated and engaged voters, contributing to their own increased civic engagement.

### When nonprofits like NAMI engage our community around voting, we are effective.

Nonprofit VOTE's 2018 evaluation showed that voters contacted by nonprofits in person while in contact with the nonprofit organization (such as at their events or programs) voted at higher rates than other registered voters in their state across all demographics. Nonprofits had the biggest impact on turnout among least-likely voters.

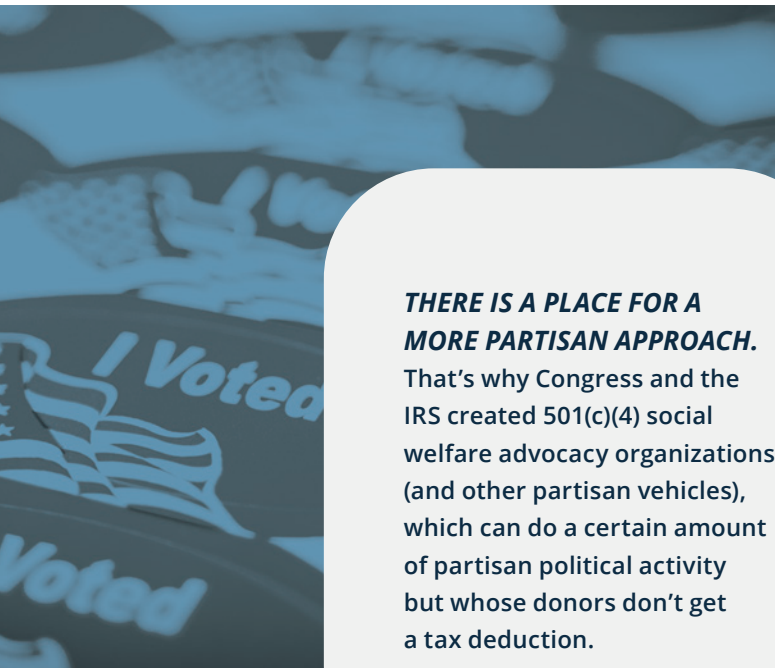
# 1

## STAYING NONPARTISAN

### THE POWER OF NONPARTISANSHIP

In 1954, Congress added a sentence to Treasury regulations requiring charities to remain nonpartisan in elections. They did this to protect charities from becoming vehicles for partisan political activity and to discourage Congress from eliminating the charitable deduction, which encourages many people to contribute to nonprofits.

But the power of being nonpartisan is much more than this statute.




#### THERE IS A PLACE FOR A MORE PARTISAN APPROACH.

That's why Congress and the IRS created 501(c)(4) social welfare advocacy organizations (and other partisan vehicles), which can do a certain amount of partisan political activity but whose donors don't get a tax deduction.

- 1 — **NONPARTISANSHIP RESPECTS THE DIVERSITY OF POLITICAL OPINIONS** among our staff, volunteers and the people we serve.
- 2 — **IT STRENGTHENS OUR ABILITY TO ADVOCATE ACROSS PARTISAN LINES** and have access to and relationships with diverse community leaders and funding sources.
- 3 — **IT MAKES US TRUSTED MESSENGERS WHO CAN ENGAGE UNDERSERVED POPULATIONS** that campaigns and candidates often miss. Our nonpartisan approach is one reason nonprofits have proven effective at reaching youth, new citizens and new voters, and increasing voting rates across all demographics. (Also see *Common Sense and Reaffirmation of 501(c)(3) Nonprofit Nonpartisanship*, National Council of Nonprofits.)

## What NAMI Volunteers and Leadership Can Say About the Election

All NAMI organizations are 501(c)(3) nonprofits. Volunteers and leaders working at 501(c)(3) nonprofit organizations like a NAMI should be nonpartisan when representing the organization on the job, at events, during classes and support groups, or while doing voter engagement activities. You cannot suggest which candidate to vote for or which political party to support.



When representing NAMI, you cannot suggest which candidate to vote for or which political party to support.

### Q *What is okay to talk about on a nonpartisan basis?*

It's fine to provide information about the voting process, like dates and deadlines to register or apply for a mail-in ballot, early voting hours, how to vote by mail or help registering to vote. You can also let people know about a candidate forum or debate.

### Q *What if someone asks me who I support or who they should vote for?*

All NAMI volunteers and leadership must be nonpartisan while they are representing NAMI. Your options are:

- Encourage the person to talk to a friend or family member they trust and share values with.
- Direct the person to a sample ballot or nonpartisan voter guide if available.
- Closer to the election, you can link them to online tools that let voters know what's on their ballot, like searching "What's on (my state) ballot?" on Google. Additionally, they may want to use online tools such as [Vote411.org](https://www.vote411.org), [Ballot Ready](https://www.ballotready.org), [Ballotpedia](https://www.ballotpedia.org), or visit [vote4mentalhealth.org](https://www.vote4mentalhealth.org).

### Q *Can I say anything about specific candidates?*

You can only answer simple facts like what party they belong to, if they're an incumbent or challenger or where they live. Don't state your preferences.



**Q What do I say when asked about the difference between Republicans and Democrats?**

There is no good answer or any accurate source that doesn't have a bias outside of the political parties' websites. You could mention the names of the current nominees for president and their party but go no further. Do the same as you would do with candidates and tell them to ask a friend or go to the political parties' official websites.

**Q What if I'm asked about a ballot measure?**

Ballot measures are about laws not candidates. You may discuss the pros and cons of a ballot measure unless your NAMI's policy is not to do so. You can also tell someone that the NAMI doesn't have an official position on ballot questions (see page 39 on *Ballot Measures*).

**Q Can I support candidates in my personal time?**

Yes. You may support candidates when not "on the clock" representing your NAMI. If you engage in partisan activities during the workday, you must take non-paid personal leave.

**Q Can I talk to other volunteers or staff about the elections?**

It's normal and acceptable to exchange views on candidates and the election with other volunteers and leaders around the "water cooler" or on breaks. Remember to be respectful of those who may not be comfortable having conversations about their personal political views or other election-related topics. Do not conduct political activities during work hours, such as handing out literature or signing up other people to support a candidate.

**Q Can I wear pins or t-shirts that indicate the candidate I support while at a NAMI event?**

NAMI staff, Board members and volunteers, including program and support group facilitators, should not wear pins, stickers, clothing or visibly identify with specific candidates or political parties while representing NAMI at an event, such as a NAMI booth or candidate forum, or during a NAMI class or presentation.

**Q What if a participant brings up a candidate or political party during a support group or education program?**

If a participant is experiencing symptoms as a result of a candidate or political party, focus on the feelings and not the candidate or political party. If a participant brings up a political party or candidate absent any symptoms, treat the comments like any other time when a participant is off-topic — bring the individual and the group back on topic.



Focus on the feelings and not the candidate or political party.

**Q Can a NAMI staff member be listed as a supporter of a candidate, with your NAMI organization also listed?**

It is okay to have your name listed as supporting a candidate. If your NAMI organization is listed, the listing should state “for identification purposes only.” If you are a NAMI organization leader and you choose to make comments about candidates, you must indicate that they represent your personal opinion and not that of your NAMI State Organization or NAMI Affiliate.

**Q What if a candidate lists a NAMI staff member or volunteer and their NAMI organization as a supporter without permission?**

If a candidate lists a NAMI staff, Board member or volunteer with their NAMI title on campaign materials without the disclaimer “for identification purposes only,” your NAMI is not at fault. You should ask the campaign to remove that individual’s name from the list. Make sure to save your email or written request in case it comes up in the future.



## Nonprofit Rules for Talking About Elections on Social Media

As a nonprofit organization, the rules for what your NAMI can say about elections on social media are similar to what you can say in-person at events or programs. However, it makes a difference whether you are using your NAMI's social media accounts or your personal accounts. Please note that if your personal social media account is primarily used in your professional NAMI role, you may want to share political information with caution. Read on to learn more.



You cannot share information on candidates if you're using your NAMI's social media account.

### **Q** *Can I use social media to post or share information about the candidates?*

You cannot share information on candidates if you're using your NAMI's social media account. It's okay to say what you want on your personal accounts. (If you are a NAMI staff member or leader who is primarily using your social media account(s) in your professional NAMI role, you may want to be careful about tweeting or posting your personal political views, candidate comments or political commentary, or information that could be viewed as partisan if you think it will be taken as the opinion of your NAMI. We encourage you to note in your social media account bio that the views you express are your own and not that of your NAMI organization.)

### **Q** *What are guidelines for tagging, sharing or re-tweeting?*

Don't use organizational accounts to tag, re-tweet or share posts with political campaigns or partisan organizations that have endorsed candidates. If you'd like to share educational information about upcoming elections, look for a news article or other neutral source that references all candidates' plans to address an issue. You may also share content from organizations (as long as they are not political campaigns) that conduct political activities — like a 501(c)(4) advocacy group — if the content is educational and clearly nonpartisan.

**Q** *Is my nonprofit responsible for how our posts are shared?*

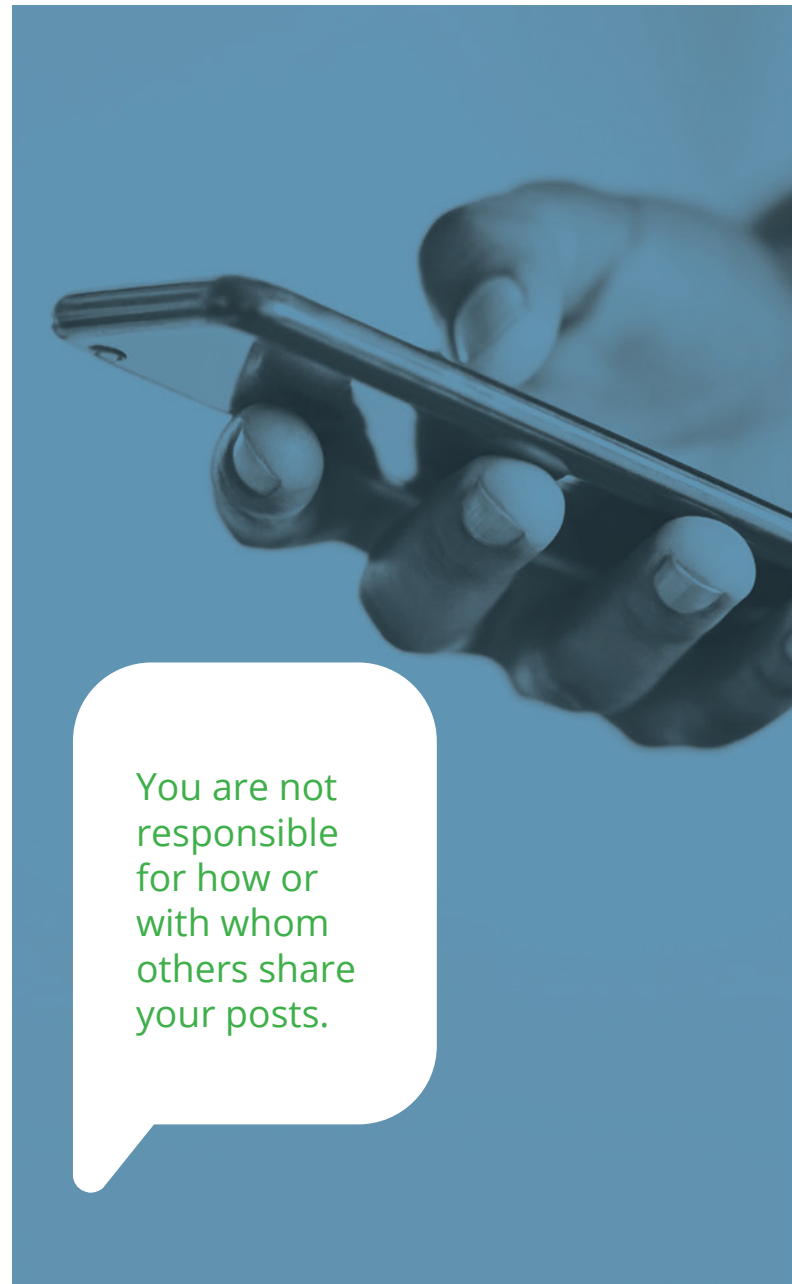
No. You are not responsible for how and with whom others share your posts.

**Q** *What about content posted by other users to our social media platforms? (Facebook page, Twitter feed, etc.)*

While you can't control what other people post to your wall or tweet at you, you can make a general disclaimer on your social media site that you're not responsible for opinions posted by people not employed by your NAMI organization. Create and share guidelines for deleting partisan content or other types of posts (like unauthorized commercial activity).

**Q** *Can we respond to political comments on our social media posts?*

Yes. Your NAMI organization may respond to comments and replies on your social media posts, but you should be cautious and consistent. For example, if someone leaves a partisan comment on your NAMI's Facebook post, you may ignore it and rely on your social media disclaimer, delete it or post a follow-up from a staff member (stating that the statements expressed do not reflect NAMI's views and NAMI does not support or oppose candidates). Whichever option you choose, it's important to take a consistent approach to all partisan comments.



## How Nonprofits Can Advocate During an Election Year

During an election year, NAMIs, as nonprofits, can still do critical advocacy work for the issues that are important to them. However, 501(c)(3)s may choose to be more cautious on how they talk about their issues directly with candidates.

### NONPROFITS CAN

- ✓ Engage in limited lobbying activities, including work on ballot measures that may address issues important to NAMIs (see our [Ballot Measures section](#) on page 39)
- ✓ Continue to advocate for issues NAMI cares about during an ongoing election year, like mental health funding, housing supports or crisis response services
- ✓ Make sure candidates are educated on public interest issues often addressed by NAMI, like access to mental health care and the criminalization of mental illness
- ✓ Prepare candidate questionnaires that are open-ended and publish all responses in an impartial way without editing (refer to Bolder Advocacy for more information about sharing nonpartisan information)<sup>2</sup>

### NONPROFITS CANNOT

- ✗ Ask candidates to sign pledges on any issue (for example, you cannot ask them to commit to voting a certain way on a bill or issue if they get elected)
- ✗ Engage in issue advocacy during the election season if your NAMI has not worked on the issue in the past, the issue is not directly tied to NAMI's mission or your advocacy could be used to imply preference for a particular candidate
- ✗ Criticize a sitting elected official by attacking their personal characteristics, rather than focusing on the substance of a policy issue
- ✗ Highlight the differences between candidates for public office on a high-profile issue on which the candidates in an election year have diverging views

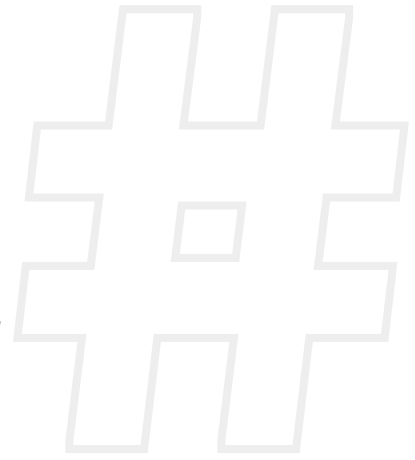
For more information on what 501(c)(3)s can and cannot do when advocating on issues during an election year, visit [Bolder Advocacy's "Election Checklist for 501\(c\)\(3\) Public Charities."](#)<sup>3</sup>

<sup>2</sup> Bolder Advocacy — Candidate Questionnaire and Voter Guide information: [bolderadvocacy.org/resource/candidate-questionnaires-and-voter-guides/](https://bolderadvocacy.org/resource/candidate-questionnaires-and-voter-guides/)

<sup>3</sup> Bolder Advocacy — Ensuring Election Year Advocacy Efforts Remain Nonpartisan: [bolderadvocacy.org/resource/election-checklist-for-501c3-public-charities-ensuring-election-year-advocacy-efforts-remain-nonpartisan/](https://bolderadvocacy.org/resource/election-checklist-for-501c3-public-charities-ensuring-election-year-advocacy-efforts-remain-nonpartisan/)

# 2

## **CANDIDATE ENGAGEMENT**



Elections offer many opportunities to interact with candidates for elected office at all levels of government. As a 501(c)(3) organization, your NAMI cannot endorse or oppose candidates. However, you can still work with campaigns to get your issues in front of the candidates, build relationships with possible future elected officials, share your policy ideas, and influence future debates and decisions on key topics for NAMI.

Consider how your NAMI can connect to candidates in various races during the election season. This section covers a variety of options that you can choose from to fit your capacity. While these options are briefly listed below, the following pages provide more details on each strategy.



### **1** — **SHARE YOUR POLICY IDEAS.**

Although elected officials can benefit from your ideas and research year-round, elections provide a focused opportunity to establish influence with the campaign while demonstrating your NAMI's expertise. During a campaign, candidates need current research and fresh ideas to answer questions and connect with voters. NAMIs can — and are encouraged to — share policy ideas with candidates and campaign staff. Sharing your policy ideas with candidates, and asking your network to do the same, can help advance the NAMI mission, but be sure to make your ideas and existing research available to all candidates. For example, if you email it to one candidate, it should be emailed to all. If you present it to a candidate at an in-person event, you should attend other candidates'

in-person events and present them with the same information.

Mental health touches many different policy areas — health care, housing, criminal justice, research, employment, education and more. Because of that, candidates who are unfamiliar with NAMI or mental health may not know how each of those areas impact the people we serve. Elections are a key opportunity to provide education on the wide range of policy issues that intersect with mental health and to highlight your NAMI’s year-round priorities.

**2** **ATTEND CANDIDATE EVENTS.** Don’t be shy! Candidate events and town halls are a great opportunity to make candidates aware of issues affecting mental health, to alert them that NAMI is active in the community and to educate other attendees about mental health. Attend candidate events or virtual town halls and ask questions. However, if you are representing NAMI, your approach must be strictly nonpartisan. You or another NAMI representative must make an effort to ask the same NAMI-related question at events for all candidates in the same race.

**3** **CANDIDATE APPEARANCES AT YOUR EVENT.** NAMI events, like a NAMIWalks or even your annual conference, are great opportunities for NAMI to connect with candidates and for candidates to meet members of the NAMI community. If you are inviting a candidate to attend your event (whether in person or virtual), you must invite all candidates to attend (see the following section for more details). The invitation




Candidate events and town halls are great opportunities to make candidates aware of issues affecting mental health.

alone gets your NAMI’s name in front of the candidates, but hosting candidates at an event also allows NAMI stakeholders to ask questions and better understand their choices.

**4** **HOST OR CO-SPONSOR A CANDIDATE FORUM.** Candidate forums such as town halls aim to bring together candidates and the community for discussion. They not only connect your NAMI with candidates, but they also give your members and other invited guests a chance to meet and interact with future officials. Hosting a candidate forum can raise the profile of your NAMI and highlight your issues during an election. Consider co-sponsoring a forum with other nonpartisan organizations in your community to boost candidate interest and audience participation.

**5** **CONDUCT A CANDIDATE QUESTIONNAIRE.** A candidate questionnaire is a powerful tool to advance your NAMI's public policy goals. 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, publicize them on your website and in your communications. Ask your board members, volunteers, donors, etc., to share with others as well. Many candidates often have limited time and are fielding many requests, so consider collaborating with partners to combine efforts and increase the likelihood that candidates will reply.



A forum can raise the profile of your NAMI and highlight your issues during an election.



## Candidate Appearances at Your NAMI Event

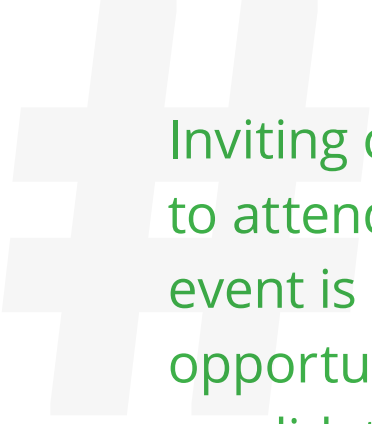
Inviting candidates to attend your event, like a NAMIWalks or your annual conference, is a great opportunity for candidates to meet members of the NAMI community and for your NAMI to build a relationship with a potential future officeholder. In some cases, you may invite a candidate not because they are running for office, but because they currently hold an elected position. If you invite someone running for office, it is important to be clear why you are inviting them and follow the below guidelines.



During the election season, a candidate may appear at your events in one of three ways:

- 1 — ***In their capacity as a candidate invited to your event;***
- 2 — ***In their capacity as a public figure (such as a current elected official) invited to your event; or***
- 3 — ***As an uninvited attendee at a public event.***

Each scenario has different guidelines to ensure that their appearance remains nonpartisan.



Inviting candidates to attend your event is a great opportunity for candidates to meet members of the NAMI community.

### 1 **Inviting Candidates to an Event in Their Capacity as Candidates**

Your NAMI may want to invite candidates for office to a function or event to expose them to your work, develop relationships with them as future office holders or for a purpose related to your ongoing programs. You must provide all viable candidates with an opportunity to participate, either at the same event or similar events.

When determining which candidates are “viable,” meaning which have some likelihood of winning their election, you can either consider all candidates on the ballot to be “viable” or set a polling percentage that candidates must hit to be considered. For instance, you could set 10% in public polling as the threshold candidates need to meet to be considered viable. If you choose to go this route, clearly communicate that threshold with the candidates. You cannot use this standard to purposely exclude candidates with whom you disagree or dislike.

#### ***If you invite all the candidates to the SAME event:***

- ✓ Invite all viable candidates in the same race. They don’t all have to come, but all must be invited.
- ✓ Remind candidates that they are attending as guests. Campaigning and political fundraising are prohibited, so request that candidates not bring flyers, buttons or make asks for support at the event.
- ✓ Remind the audience that this is a nonpartisan event.

#### ***If you invite candidates to appear at DIFFERENT events:***

- ✓ Provide equal opportunity to viable candidates for the same office, including a similar time, venue, audience and presentation format.
- ✓ Prior to introducing the candidate, clarify for the audience that the appearance is not an endorsement by NAMI and that there will be additional opportunities to meet the other candidates in that race.

Keep in mind that elected officials are also candidates when they are running for re-election in a primary or general election. This is particularly important to remember in the last two months leading up to the election, when it becomes more difficult for them to appear at an event only in their current official capacity.

### 2 **Inviting a Candidate to an Event in Their Capacity as a Public Figure**

Your NAMI may invite a candidate to your event in their capacity as a recognized public figure, like an elected official or expert in their field. You might invite a current candidate to speak because he or she 1) currently holds, or formerly held, a public office; 2) is considered an expert in a non-political field; 3) is a celebrity or has led a distinguished public service, military, legal, or other career. For example, if your governor is running for Congress, you may invite her to your annual conference in her current role as the governor and not as a candidate for Congress.

*Under these circumstances, you may only extend an invitation if:*

- ✓ The candidate is chosen to speak solely for reasons other than their candidacy and speaks only in a non-candidate capacity.
- ✓ There is no mention of their candidacy during the presentation or event.
- ✓ The atmosphere is kept entirely nonpartisan and free of campaign activity (e.g., there are no campaign brochures or other materials put out on a table).

If a candidate attends your event as a public figure, not as a candidate, you do not have to extend an invitation to other candidates in the race. Make sure that the candidate and their staff are aware that they are being invited in their current role and not as a candidate, and let them know that no mention of their campaign or campaign materials can be part of the event.

### 3 **Candidates Attending Your Event on Their Own Initiative**

Candidates may appear at a public event held by your NAMI on their own initiative. If they do this, ensure that there is no actual or implied endorsement. Do not give the candidate an opportunity to address the gathering or distribute campaign literature. If they have an opportunity to address your audience, the previous rules about providing an equal opportunity to other candidates will apply.

### **Candidate Forums**

A wide variety of policy issues are important to NAMI and the NAMI community. It can be helpful to bring candidates together — in person or virtually — to hear their positions on these issues and engage in important discussions about mental health. By convening candidate forums, these events also position your NAMI as a community leader and elevate your reputation with candidates.

#### ***Keeping Your Forum Nonpartisan***

When planning your NAMI candidate forum, remember nonpartisanship is key! Not only is it required for 501(c)(3) organizations like your NAMI, but it also encourages attendance by candidates, attracts more interest from the media, and is an effective tool for engaging your community around the issues that matter to them.



### **Basic Guidelines for Staying Nonpartisan**

**THE FORUM SHOULD COVER A BROAD RANGE OF ISSUES.** Since NAMI works on a wide range of issues from housing to health care and criminal justice involvement to veterans' issues, this should be easily achievable.

**CANDIDATES SHOULD BE GIVEN EQUAL TIME** to present their views.

The candidates should be asked about issues but **SHOULD NOT BE ASKED TO PLEDGE TO OR AGREE** with specific positions of the sponsoring organizations.

**THE MODERATOR SHOULD STAY NEUTRAL** and should not imply approval or disapproval of the candidates or their responses.

### ***Inviting the Candidates***

Invite all viable (see page 18 for *details on how to determine viability*) candidates for a specific office to your forum and make an equal effort to encourage each of them to attend. If it is a two-candidate race and only one agrees to attend, you should not go forward with your forum.

#### **Q *What about a race with several candidates?***

At least two candidates must attend for the event to be a forum. You may want to ensure the front runners can attend, but having any two or more is enough to make it nonpartisan.

#### **Q *What about a last-minute cancellation?***

If it is a two-candidate race and one cancels with very little notice, or worse, doesn't show up, you may cancel or go forward with the candidate event as planned. If you go forward, make sure to announce that this in no way signifies NAMI's endorsement of the attending candidate.

### ***Questions Asked at the Forum***

You may want to have one or more staff or board members in charge of reviewing audience questions before handing them to the moderator. Your forum should ask good and fair questions, but none that signal a strong bias for or against a candidate. It's okay to ask straightforward questions on the issues, but balance these across partisan lines.

### ***Ground Rules During the Forum***

**PARTISAN ATTIRE:** While not required, you may want to ask audience members to check their partisan materials (including buttons and signs) at the door. This helps to create a sense of nonpartisanship within the forum hall.

**THE AUDIENCE:** Ask the audience to respectfully refrain from excessive cheering for or against a



Your forum should ask good and fair questions, but none that signal a strong bias for or against a candidate.

particular candidate. If the event is virtual, the same rules apply. Ask your audience to refrain from typing statements for or against candidates in the chat box.

You may provide nonpartisan voter education, voter registration and get-out-the-vote materials for your audience. Have a separate table outside the forum room for candidates to place their literature. If the event is virtual, you may provide candidate websites to attendees if they are shared for each candidate.

## What the Candidates Want in a Forum

It is helpful to understand what the candidates hope for in a nonprofit candidate forum. Following these tips will help make it more likely that candidates will attend.



### 1 **A Large Audience!**

Candidates are spread very thin during a campaign season. They cannot attend every event to which they are invited. We encourage you to enlist partners, including those beyond just mental health groups, like veterans and homelessness groups, to co-sponsor the event. This will attract a broader audience and signal that you plan to cover a variety of issues. In one way, virtual events make this even easier. You can invite people who may not live in the immediate area but who are still constituents impacted by this race.

You and your co-sponsors should focus on turnout to increase the chances that candidates will attend. This is a great opportunity to invite members, volunteers, program and support group participants, and NAMI on Campus chapters, as well as young professional groups, donors, partners and more. Be sure to communicate your expected audience size to the candidates in advance, as a large turnout demonstrates that NAMI has influence on voters.

If your event is virtual, another way to increase the audience is to record it. Secure permission from the candidates, ideally during the invitation process, and announce that the forum is being recorded during the event. Be sure to remind viewers that the event is nonpartisan — and include the word “nonpartisan” in the video’s title. If the video is edited at all, it cannot cut out what any candidate is saying or cause the appearance that any candidate is the preferred choice.

**2 — A Guarantee of Neutrality**

Candidates will avoid any event where they think they could be ganged up on — especially if the media is expected to attend. In all of your communications with the candidates, remind them of the nonpartisan nature of the forum and share any ground rules you have established to keep everything neutral. Additionally, let them know if the media has been invited and keep them up to date if you are aware of any media participation.

**3 — A Trusted and Well-Respected Nonprofit in the District**

Leverage your reputation as a respected community organization and your partnerships with other nonprofits. Since candidates are aware of nonprofits that have held successful and neutral candidate forums in the past and will be more likely to attend if those organizations are involved, consider inviting them to become co-sponsors. Because of the many issues NAMI works on, you have the opportunity to consider a variety of traditional and non-traditional partners.

**4 — Time to Meet Informally with Voters**

If the event is in person, allow time after the forum for the candidates to speak one-on-one with voters and shake hands. Tell candidates about this opportunity in your invitation, as it will be a selling point.



**5 — More Information About Your Organization**

In your invitation to the candidates, briefly explain NAMI's mission and who you serve, as well as how your organization affects policy. Many candidates and elected officials rely on nonprofits as resources for policy information.

## Selecting a Format for Your Forum

At the top of your to-do list is selecting the format of your forum. As you decide, remember that it's important to select the option that best meets your NAMI's needs.

If your event is virtual, your NAMI may use your organization's web-based conferencing software to host the event. You may want to consider software that allows you to mute all audio lines and request that questions are only submitted in a "chat" or "Q&A" box.



### Common Formats for Candidate Forums

#### **EQUAL TIME Q&A**

In this format, an impartial moderator and panelists ask questions of the candidates, who are allowed equal time to respond. Traditionally, the candidates are unaware of the exact questions but know the established focus of the program. Candidates may answer the same questions or may be asked different questions, as long as each is given equal time to present their point of view. No follow-up questions are allowed.

#### **FOLLOW-UP Q&A**

Similar to the "Equal Time Q&A," this approach allows the moderator and/or panelists to ask the candidates questions. However, to get clarifications and more specific answers, follow-up questions are permitted.

#### **TOWN MEETING Q&A**

Members of the audience ask all questions during the event. Questions should be screened by a staff member

in advance to avoid partisan questions and to facilitate productive dialogue. The audience members asking questions may use their time to educate the candidate on the issue. If you are holding your event virtually, you may want to request questions from the audience ahead of time, unmuting a specific audience member when it is time to ask their question.

#### **PREPARED AND SPONTANEOUS DEBATE**

Prior to the forum, the candidates are presented with several prepared questions constructed to elicit detailed responses. A selection — but not necessarily all — of these questions will be asked at the forum. Candidates will also be asked to give spontaneous answers to questions that originate with the moderator, their opponents and/or the audience, like the debates we're used to seeing on television.



## Publicizing Your Forum

- 1 — Promote, Promote, Promote!**  
Use all your communication channels to ensure your event is a success. Target your online and print promotion to maximize your impact. Post flyers and make details about the forum available to those who attend your programs and support groups. Encourage your partner organizations to do the same.
- 2 — Leverage Partners and Media Outlets That Have Featured Your Work in the Past**  
Ask them to share information about the event with their audience or to send attendees.
- 3 — Capitalize on Key Election Dates and Campaign News**  
Use key election dates or campaign news to time your outreach and drive communications in the lead-up to the forum.
- 4 — Identify an Individual to Personally Contact Media Outlets**  
Use this opportunity to establish new relationships and raise your NAMI's profile.
- 5 — Use a Known Moderator to Draw Additional Attention**  
Consider someone with a high profile in your community, like a local journalist.
- 6 — Leverage Your Nonpartisanship as an Advantage**  
For the media and your audience, a forum is a chance to hear from candidates in a nonpartisan setting rather than hear stock messages from the campaign trail. Reiterate the nonpartisan nature of your event.



Describe your forum as a “community event.”

- 7 — Frame Your Forum as a “Community Event”**  
Describe your forum as a “community event” — one that brings community members together to engage in the democratic process and learn about candidates’ positions on issues.

Ideally, you will begin planning your forum several months in advance. Shorter timelines can work, but make sure the date and location are set and candidates are confirmed with enough time to do thorough promotion.



## Tips for a Successful Candidate Forum

**START PLANNING EARLY.** A rushed event may not get good candidate or community member participation.

**PLAN FOR A BIG TURNOUT.** Don't assume you will have low participation. Work to attract a variety of audiences and promote your event repeatedly.

**URGE PARTNERS AND CO-SPONSORS TO PROMOTE THE EVENT.** Partners and sponsors may need urging (and sample content) to actively promote the event — but verify their effort. (Some may be sponsors in name only but may not actively promote the event.)

**SEND MEDIA RELEASES WITH FOLLOW-UP.** Personal connection with the media can help drive media participation.

**ENGAGE DIVERSE MEDIA OUTLETS.**

Reach out to media outlets that are in other languages common to your community to drive broader community participation and engagement.

**USE GOOD SIGNAGE.** If in person, put up signs around the building and immediate area so people can find the event.

**PROVIDE INSTRUCTIONS ON HOW TO JOIN A VIRTUAL EVENT.** If you're holding a virtual forum, it is likely a new experience for candidates and the audience. Provide clear instructions to both on how to participate.

**EXPLAIN HOW THE EVENT WILL WORK.**

Tell your audience at the start what will occur — who asks questions, when the audience participates and how, expected decorum, etc.

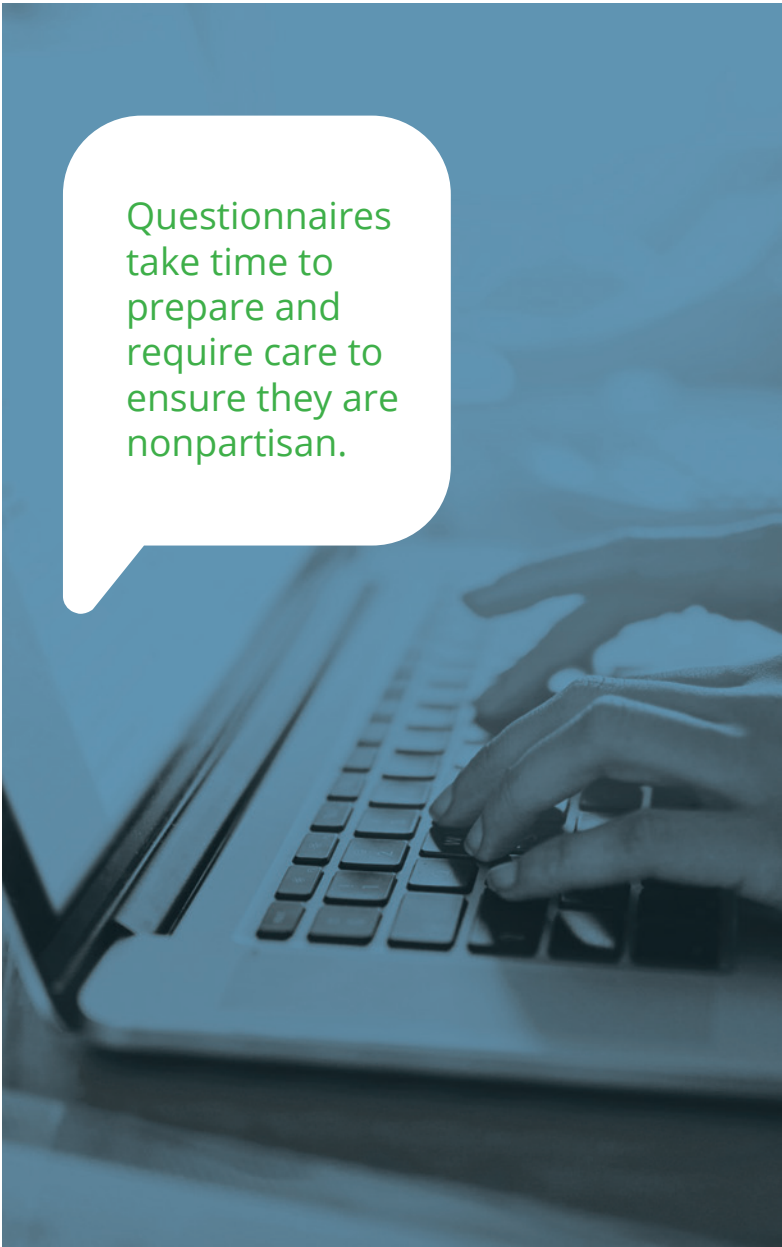


## Candidate Questionnaires

Candidate questionnaires serve two purposes. First, they collect information for voters to use in understanding a candidate's position on issues. Second, they let candidates know the range of issues of concern to the organization(s) preparing the questionnaire, which are often packaged together as a voter guide.

Questionnaires take time to prepare and require care to ensure they are nonpartisan, which is important to NAMI as a 501(c)(3) organization. If you wish to do a candidate questionnaire, consider these key factors in determining whether a questionnaire is nonpartisan:

- Do your questions cover a range of issues important to NAMI and related to the broad interests of the electorate? And do the questions address a number of issues relevant to a specific elected office? Due to NAMI's wide range of interest areas, you might ask about issues from housing to health care and from crisis services to support for veterans.
- Are the questions or any description of the issues clear and unbiased in both structure and content? Avoid directing candidates to a "correct" answer.
- Are the questions posed to candidates identical to the questions you later publicly print or post online? Don't alter the questions in any way. Share them just as you sent them to candidates.
- Are the candidates given a reasonable amount of time to respond? NAMI is not the only organization requesting responses from candidates, so provide a reasonable timeframe for receiving responses.
- If the questions ask the candidates to respond with "Yes" or "No" or "Undecided," are they given the opportunity to give an explanation?



Questionnaires take time to prepare and require care to ensure they are nonpartisan.

Offer the space for a short 1–2 sentence explanation of their positions in their own words.

- Have all major candidates responded? If not, you'll want to consider what you can or should share (see page 28, *"What If a Candidate Does Not Respond to Your Questionnaire?"*).



## What If a Candidate Does Not Respond to Your Questionnaire?

***IF ONLY ONE CANDIDATE IN A RACE WITH THREE OR MORE CANDIDATES RESPONDS***, you can still publish the responses. If only one candidate in a two-way race responds, it is highly recommended to not publish the lone response to avoid appearing like you favor a particular candidate.

***IF THERE ARE MULTIPLE CANDIDATES IN THE RACE AND ONE OR MORE DOES NOT REPLY*** to your request, you may list “Did Not Respond.”

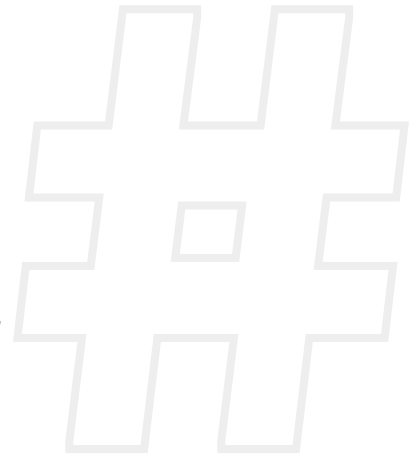
***IF A CANDIDATE FAILS TO RESPOND, 501(C)(3)S MAY CHOOSE TO PROVIDE INFORMATION*** about the candidate that is a matter of public record or on their website. If you do, stick to strictly factual information (name, address, etc.)

and avoid efforts to summarize the candidate’s positions on issues, which might appear to be slanted to favor or disfavor the candidate.

***PROVIDE CANDIDATES WITH A REASONABLE TIME PERIOD TO GIVE THEIR RESPONSE, AND PROVIDE A DEADLINE.*** As the deadline nears, follow-up with the campaign again and let the candidates know that if they don’t respond, you will print “Did Not Respond.”

While not required, ***IT IS A GOOD PRACTICE TO GIVE THE CANDIDATES THE CHANCE TO REVIEW*** the final draft of their information and make any last-minute corrections.

## VOTER ENGAGEMENT



As a trusted source of information, your NAMI can also play a role in helping people understand why their vote matters for mental health, register to vote and understand their options for casting their ballot. Voters who are contacted by nonprofits are more likely to follow through and vote, so your NAMI can make a real difference. In addition to helping people exercise their right to vote, candidates and campaigns also seek out and respond to communities with higher voter registration and turnout rates and to organizations that care about voting. This section covers multiple ways you can engage voters.

By helping people vote, you raise NAMI's profile with future policymakers.



**1** — **EDUCATING VOTERS ABOUT THE ISSUES AND THE PROCESS.** Voters may not know the rules for voting in your community, like whether they need to bring an ID card. They also may not make the connection on how their vote impacts the mental health services and supports they see locally. In the lead-up to the election, your NAMI can be the source of both.

**2** — **PROMOTING VOTER REGISTRATION AND THE PLEDGE TO #VOTE4MENTALHEALTH.** NAMI has created the *Pledge to #Vote4MentalHealth* as a way to get people who care about mental health excited about the elections. A simple way to get your members and community engaged is to direct them to take the

pledge, and they will then receive voting and registration reminders. Your NAMI can also organize voter registration activities to ensure that those affected by mental illness understand how to exercise their right to vote.

**3** **SHARING INFORMATION ON OPTIONS FOR VOTING.** Voting is no longer just done on Election Day. Your NAMI can share information on how to vote in person on Election Day as well as how to vote in person during early voting or vote-by-mail in your area. The rules differ state to state, so your NAMI can serve as a trusted resource to share information about their options — and how to exercise their right to vote safely.

**4** **PROVIDING VOTING REMINDERS AND HELPING TO GET OUT THE VOTE.** Even when people are registered to vote, they may not go to the polls or send in their ballots. Your NAMI can play a role by sending information on where and when to cast their ballot, support people getting to the polls or help them make a plan to vote.

**5** **PROMOTING BALLOT MEASURES.** NAMIs and other nonprofit organizations may get engaged in promoting votes for or against ballot measures. Often, these ballot measures can have a major impact on people with mental illness, so your NAMI's perspective may help voters understand their options.

Your NAMI can serve as a trusted resource to share information about options — and how to exercise the right to vote safely.



## Educating Voters

New voters, and those new to your state or community, may not know about the voting process in your area, but you can help them understand when, where and how to vote. Reminders (ideally multiple!) from your NAMI will set them up for greater success at the ballot box.

Voters also often don't realize the connection between their vote and mental health. NAMI's #Vote4MentalHealth campaign aims to educate voters on how mental health relates to different policy issues and what influence elected officials at all levels of government have on mental health — as well as provide information on how to cast a ballot. Your NAMI is well-positioned to educate voters on how the people we elect will make decisions that impact the availability of mental health care in the community.

Voters want to know in advance what's on their ballot. Nonpartisan ways to provide this information include distributing nonpartisan voter guides from a trusted partner or sample ballots from your state election office.

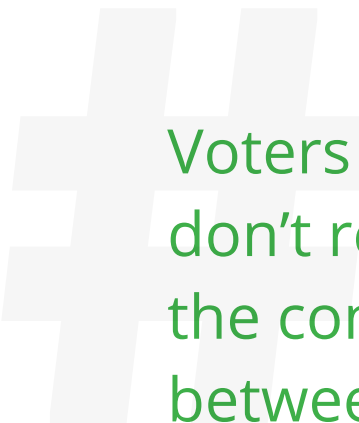
### *SAMPLE ACTIVITIES: INFORMING VOTERS ABOUT WHAT'S ON THEIR BALLOT*

- Display or give out a sample ballot.
- Provide a copy or link to a nonpartisan voter guide.
- Hold a mock election for young people ages 6–17.

As part of the #Vote4MentalHealth campaign, voters can pledge to #Vote4MentalHealth. Voters who take the pledge will receive reminders of election dates and deadlines, educational information on mental health, and the elections and resources on making a plan to vote.

### *SAMPLE ACTIVITIES: ENCOURAGING VOTERS TO TAKE THE PLEDGE TO #VOTE4MENTALHEALTH*

- Add a link on your NAMI's website to [vote4mentalhealth.org](https://vote4mentalhealth.org) encouraging people to learn more and take the pledge.
- Use your communications to urge people to pledge to #Vote4MentalHealth and link to the pledge.
- Ask voters to record short videos about why they #Vote4MentalHealth. Suggest sharing the video on social media with the hashtag.
- Share information on how different elected offices impact mental health policy — without pushing for one candidate or party.



Voters often don't realize the connection between their vote and mental health.

## Voter Registration and Pledging to #Vote4MentalHealth

Voter registration is a common and important nonpartisan activity for nonprofits. Even in states where automatic voter registration is available, some eligible individuals will still need assistance registering for the first time or updating their registration for their current address. For those already registered, consider sharing information about how to request a mail-in ballot.

Additionally, NAMI encourages voters to sign a pledge to #Vote4MentalHealth, which is a simple commitment to understand how your vote impacts people with mental health conditions and how you can act. Pledging to vote can increase the likelihood someone will actually turn out to vote. It also gives NAMI a way to contact people with reminders during the election season.<sup>4</sup>



### Options for NAMIs to Conduct Voter Registration

**HOST A TABLE** at your NAMI's programs, events or in the local community or include a slide about voter registration in any virtual programs or events.

**REGISTER AND/OR ENCOURAGE TAKING THE #VOTE4MENTALHEALTH PLEDGE** with education program, support group and event participants.

Share registration and pledge information with **YOUR STAFF, BOARD AND VOLUNTEERS.**

**HAVE YOUTH OR OTHER VOLUNTEERS CONDUCT VOTER REGISTRATION/ PLEDGE DRIVES** in advance of elections or share information with their networks.

Share information about how people can register to vote **IN NEWSLETTERS AND VIA SOCIAL MEDIA, EMAIL OR VIDEO MEETINGS.** You can use nonpartisan voter registration tools like Rock the Vote, Vote.org or TurboVote, and now you can also direct your audience to NAMI's elections website, [vote4mentalhealth.org](http://vote4mentalhealth.org), where they can get information to register in your state.

**HOST A PHONE BANK** to call members or community members and share information about how they can register to vote or find more information.

**PARTICIPATE IN NATIONAL VOTER REGISTRATION DAY**, a nationwide, nonpartisan day of action held annually on the fourth Tuesday of September.<sup>5</sup>

<sup>4</sup> Costa M, Schaffner BF, Prevost A (2018). Walking the walk? Experiments on the effect of pledging to vote on youth turnout. PLoS ONE 13(5): e0197066. [doi.org/10.1371/journal.pone.0197066](https://doi.org/10.1371/journal.pone.0197066)

<sup>5</sup> Visit [nationalvoterregistrationday.org](http://nationalvoterregistrationday.org) for more information.



Every voter registration drive needs a coordinator to run the activity. It could be a program or policy person, or someone who ordinarily organizes volunteer or staff activities. For staff and volunteers doing voter registration, it helps to have someone who is naturally outgoing and is passionate about voting. Even if your NAMI will not make registration a core component of your voter engagement plan, make sure you have some familiarity with registration rules so you can assist the people you serve that are not yet registered.

Make sure you follow your state's voter registration laws and procedures. Voter registration differs in each state. Visit Nonprofit VOTE's official [Voting in Your State Guide](#) to review registration guidelines, download forms, or access online voter registration or registration look-up tools. Another great resource is [your local election office](#). They can help by providing training, guidelines and forms for conducting voter registration drives in your community.



### Tips for Active Tabling for Voter Registration

**BE PROACTIVE!** Engage people and encourage them to approach the table. Stand up, get out from behind the table and greet people. Instead of asking "Are you registered?", ask "Is your registration up-to-date for your current address?" or "Have you voted since you last moved?"

**USE LARGE SIGNAGE TO ATTRACT ATTENTION.** Banners, posters, balloons and decorations make your table inviting.

**USE SNACKS OR OTHER FREEBIES.** This encourages people to approach the table and talk to you.

**WHEN YOU'RE TALKING TO A PERSON, START TO PUT THE PEN AND CLIPBOARD IN THEIR HAND.** You'll be surprised at how many people will automatically start filling it out.

**TABLE IN THE WEEKS LEADING UP TO THE REGISTRATION DEADLINE, EARLY VOTING PERIOD OR ELECTION DAY.** For a November election, the best time to table is between August and October.

#### **Q** What about only virtual engagement?

If your NAMI is not hosting in-person events, you can still encourage voter registration with your virtual events. Include a slide or video about #Vote4MentalHealth and share NAMI's elections resources (available at [vote4mentalhealth.org](http://vote4mentalhealth.org)) with your virtual attendees.

## Sharing Information on Voting Options

An important part of voter engagement is to share information on the options for how voters can cast their ballot in upcoming elections, including voting by mail, voting early in person and voting on Election Day. Each option has advantages, and it's important to help voters make a plan and determine what method of voting is right for them.

### ***Voting By Mail***

Voting by mail options depend on your state. Several states (such as Washington) have all mail-in ballot elections, meaning every registered voter will receive a ballot. Others may have no-excuse absentee voting where you have to apply for a mail ballot, but all eligible voters can submit an application. There is also absentee voting, which requires that the voter list an excuse for an accepted reason.

#### ***SOME REASONS WHY POTENTIAL VOTERS MAY CHOOSE TO VOTE BY MAIL:***

- They will not be in their state or otherwise have access to their polling location on Election Day.
- It is the easiest way for them to cast their ballot.
- They have health concerns or are practicing social distancing during the election (while this is a viable reason for wanting to vote by mail, check absentee ballot rules for accepted excuses).
- They are more comfortable reviewing and researching their ballot at home.


To find your state's rules on voting by mail, visit [vote4mentalhealth.org](https://vote4mentalhealth.org).

### ***Voting Early in Person***

Many states offer options for voting in person at a polling location or voting center in the days or weeks ahead of the election. Hours, locations and requirements for voting early vary greatly across states.

#### ***SOME REASONS WHY POTENTIAL VOTERS MAY CHOOSE TO VOTE EARLY:***

- They are not able to vote on Election Day due to work schedules, childcare, commute, etc.
- They want an in-person voting experience but would like to avoid crowds and long lines on Election Day.
- They are volunteering to assist potential voters on Election Day.
- Voting by mail is not an accessible option for them.
- They need assistance voting and are only able to cast a ballot at an accessible polling location.



It's important to help voters make a plan and determine what method of voting is right for them.

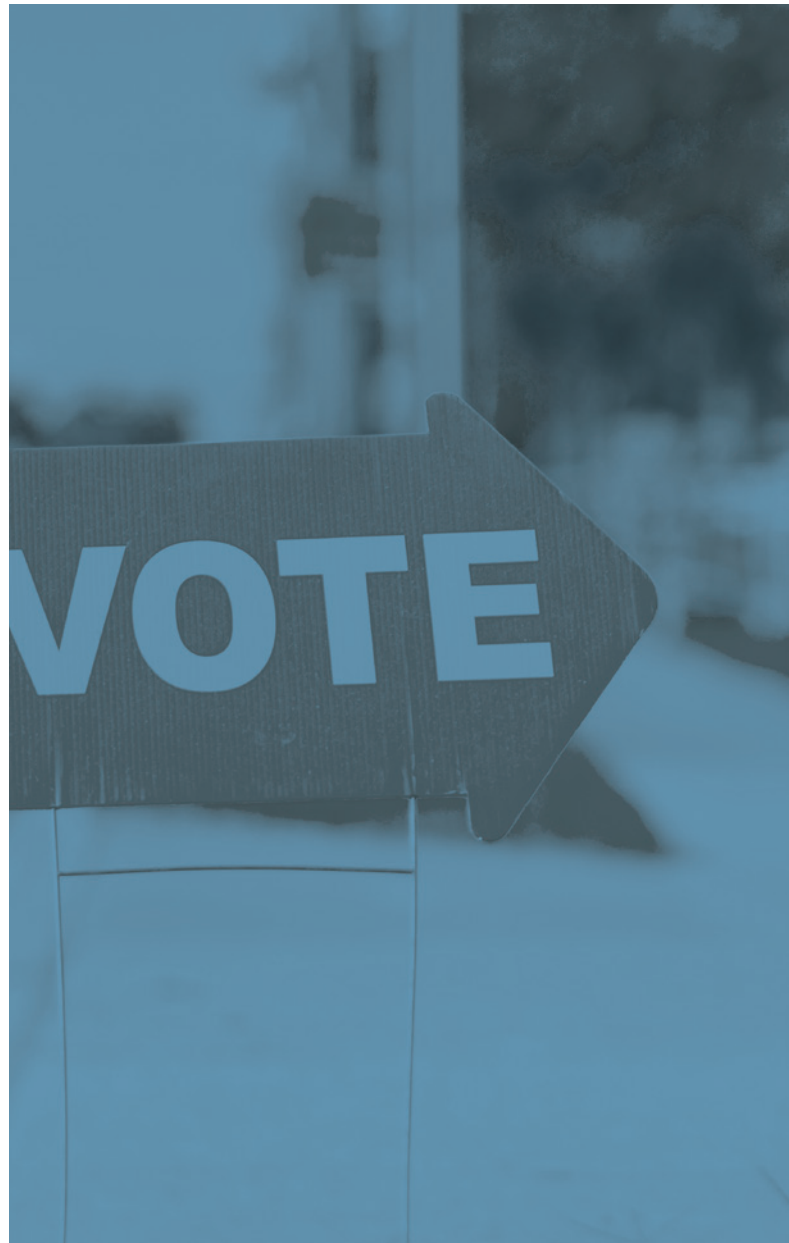
### ***Voting on Election Day***

Going to the polls on an Election Day is the most common and most familiar way of voting. Potential voters are more likely to understand the process for casting their ballot on Election Day. We recommend encouraging voters to consider all of their options for voting, as well as sharing important information about where voters can look up their polling location and hours.

#### ***SOME REASONS WHY POTENTIAL VOTERS MAY CHOOSE TO VOTE ON ELECTION DAY:***

- They have always voted on Election Day and are most comfortable with this method of voting.
- They want an Election Day in-person voting experience.
- They need assistance voting and are only able to cast a ballot at an accessible polling location.
- Voting by mail or voting early are not accessible options for them.

How a voter casts a ballot is ultimately up to them, but voting by mail and early voting are growing in popularity and may better fit the specific needs of the voter. However a person chooses to vote, it is important to make sure they are able to find out what is required to vote with each method of voting. Send voters to [vote4mentalhealth.org](https://vote4mentalhealth.org) to look up information specific to their state.



### Get Out The Vote (GOTV)

Get Out the Vote (GOTV) efforts target eligible voters in the weeks leading up to an election to encourage them to cast their ballot. Political campaigns typically spend significant resources coordinating GOTV efforts to turn out likely voters in favor of their candidacy or ballot measure.

However, since campaign resources aren't endless and their focus is on winning rather than equity, they are far less likely to contact "low propensity" voters, or voters who are less likely to show up at the polls, which may include some people affected by mental illness. This can have a future negative impact, because if those voters miss another election, their propensity score continues to drop and they become even less likely to be contacted by a political campaign. Your NAMI can help change that.

The election is coming up. Your staff and volunteers are busy and capacity is stretched. How can you help your community vote? Below are some easy GOTV tactics common to nonprofits.



#### Encouraging Your Staff to Get Out The Vote

**INCLUDE PERSONAL MESSAGES IN INTERNAL STAFF COMMUNICATIONS**

with dates and voting information.

**SEND AN EMAIL REMINDING STAFF, VOLUNTEERS AND LEADERSHIP** of

your NAMI's "time off to vote" policies, or consider creating such a policy if it doesn't already exist.

**DO A STAFF EDUCATION ACTIVITY ON A BALLOT MEASURE** or the election's

impact on mental health and the community you serve.

**CIRCULATE A SAMPLE BALLOT** or nonpartisan voter guide or a list of key races.

Encourage your staff to **MAKE A PLAN TO VOTE.**



## Encouraging Your Network to Get Out The Vote

**PUT ELECTION REMINDERS IN ALL COMMUNICATIONS.** Share reminders two weeks out, one week out and the day before. If your state does vote by mail, share reminders before that deadline. If your state requires voters to request a mail ballot, encourage your network to request that ballot before your state's deadline to do so. Encourage your audience to make a plan to vote.

**RECRUIT YOUTH TO LEAD GOTV ACTIVITIES.** People respond to young people asking them to vote.

**BE VISIBLE.** In the final week, make announcements during events and meetings, share on message boards and forums, and use signage or slides in your presentations to make the election visible.

**ORGANIZE A PHONE BANK.** Contact people you've registered or have phone numbers for and encourage them to vote/help them find their Election Day information.

**DEVOTE THE DAY BEFORE ELECTION DAY TO ASKING EVERYONE WHEN AND WHERE THEY PLAN TO VOTE.** Have a phone number or website to go to for help.

**SHARE THE ELECTION PROTECTION HOTLINE WITH VOLUNTEERS, STAFF AND LEADERSHIP.** This can be helpful in case anyone has any trouble voting and for them to share with others.<sup>6</sup>

<sup>6</sup> Election Protection Webpage: [866ourvote.org/](https://866ourvote.org/)

## Rides to Polls

For many nonprofits, particularly in communities where in-person voting on Election Day is still the primary way to vote, providing rides to polling places is critical. For some groups, providing rides will be their only voting promotion activity. Bringing someone directly to the polls is the best way to ensure that they vote.

However, consider all public health guidelines and recommendations in your community before your NAMI commits to offering rides to the polls.

### Create a Plan to Offer Rides

- ✓ How many people can you involve?  
How many staff? How many volunteers?
- ✓ Where do you want to focus?
- ✓ What resources are available?


### Partner with Other Groups

- ✓ What other groups can you work with?
- ✓ Who has offered rides before?
- ✓ What is their capacity to organize efforts? Will they depend on NAMI to coordinate?

Start thinking about drivers and vehicles RIGHT NOW! Election Day will come sooner than you think, and it is better to have more people than you can use than to not have enough. Recruit volunteers who will remain nonpartisan and whose vehicles will not have political bumper stickers.

When reminding people to vote, ask if they need a ride to the polls. Start thinking about routes and other logistical details. Ideally, you would have things planned out to the point that drivers know where they are going, and voters know when they are being picked up, at least a few days before the election. It is also a good idea to have a couple drivers who are available for last minute calls or problems. These drivers could be shared with other organizations in the area.

Make sure that drivers are licensed and insured and that vehicles have up-to-date registration and inspections as required by state law. For voters that need accommodations with transport and at their polling place due to disability or mobility issues, reach out to your local disability advocacy organization. Visit the National Disability Rights Network at [NDRN.org](http://NDRN.org) to locate a Protection & Advocacy System or Client Assistance Program near you.



Start thinking  
about drivers and  
vehicles *right now!*

## Promoting Ballot Measures

Ballot measures ask voters to vote on laws, bonding issues or constitutional amendments. About half of all states allow ballot questions or propositions to be put before the voters either by voter petition or legislative action. Ballot measure advocacy is not considered partisan activity; however, it is considered direct lobbying. That means your NAMI can advocate for or against a ballot measure, but it may trigger additional lobbying disclosure in your state.

Learn about your state lobbying rules by visiting [bolderadvocacy.org](http://bolderadvocacy.org).

### Q *What are common activities for nonprofits to take on ballot measures?*

Your NAMI can engage in a range of activities related to ballot measures, such as making an endorsement of the measure, communicating your position to the public, organizing volunteers to work on passage or defeat of an initiative, or hosting an educational forum or event. You can also distribute neutral educational materials designed to inform the public about both sides of the question. If it is a state-wide ballot measure, please discuss your activities with your NAMI State Organization before advocating.

### Q *Are there any spending limits for ballot measure advocacy?*

There are no limits on spending on ballot measures beyond your state's limits on lobbying. Some states require you to file an expenditure report if you devote "substantial funds" to ballot measure advocacy. This could happen if your NAMI, as an example, is a primary sponsor of a ballot measure or an active partner. Contact your state's campaign finance office for more information.

### Q *How much can a 501(c)(3) nonprofit spend on lobbying?*

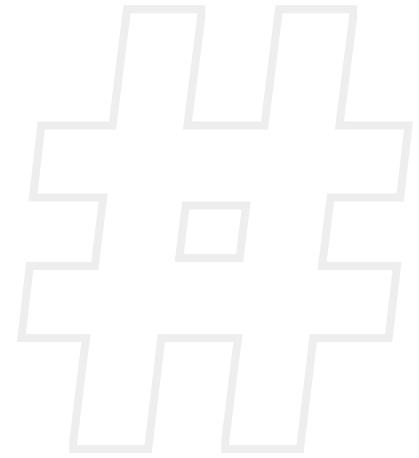
Your spending limits depend on which test your nonprofit chooses to measure lobbying.

If your nonprofit has elected to measure its lobbying under the 501(h) expenditure test, you will have clearer guidance on how much you can spend and can do more advocacy. Under this test, you can spend as much as 20% of your annual budget on lobbying, including influencing ballot questions or legislation. Filing the 501(h) form is generally recommended for nonprofits that do any significant amount of lobbying and advocacy.

If your 501(c)(3) has not filed the 501(h) form, your lobbying falls under the IRS' "insubstantial part test." In this case, you may only spend an "insubstantial" amount of money on lobbying efforts. "Insubstantial" is generally assumed to be 3-5% of annual spending.

***Please note that even if you are within the 501(h) or "insubstantial part test" limits by the IRS, ballot initiative advocacy may trigger your state's lobbying disclosure rules. Visit [bolderadvocacy.org](http://bolderadvocacy.org) to understand the rules in your state.***

# **ELECTION RESOURCES**



This toolkit provides some resources to help your NAMI engage in elections, but if you have additional questions, below are more resources to help you.

## **Vote4MentalHealth**

[VOTE4MENTALHEALTH.ORG](http://VOTE4MENTALHEALTH.ORG)

Vote4MentalHealth is a campaign led by NAMI, the National Alliance on Mental Illness, to promote nonpartisan voter participation and elevate discussions about mental health policy during the elections. Learn about key mental health issues and get resources and templates to help your NAMI engage in the election.

## **Nonprofit VOTE**

[NONPROFITVOTE.ORG](http://NONPROFITVOTE.ORG)

Nonprofit VOTE partners with America's nonprofits to help the people they serve participate and vote. Nonprofit VOTE is the largest source of nonpartisan resources to help nonprofits integrate voter engagement into their ongoing activities and services. Find webinars, tip sheets and resources to help your NAMI engage candidates and voters. Some resources include:

- [Nonprofit VOTE resource library](#)
- [Voting in your state](#)
- [Checklist for voter engagement](#)
- [Voter registration FAQs](#)
- [GOTV email template](#)
- [What nonprofit staff can say about the election](#)

## **National Voter Registration Day**

[NATIONALVOTERREGISTRATIONDAY.ORG](http://NATIONALVOTERREGISTRATIONDAY.ORG)

National Voter Registration Day is a nonpartisan civic holiday celebrating our democracy. It takes place on the fourth Tuesday of September. Since its founding in 2012, more than 3 million people have been registered as part of this effort. Sign up to be a partner and get resources to register voters.

## **Bolder Advocacy**

[BOLDERADVOCACY.ORG](http://BOLDERADVOCACY.ORG)

Bolder Advocacy equips nonprofits with the knowledge they need to be confident and powerful advocates, providing nonprofits and foundations with accessible information, resources and tools to help them navigate complex advocacy rules and regulations. Access resources and guidance to help your NAMI navigate election and lobbying laws. Some resources include:

- [Candidate questionnaire and voter guide information](#)
- [Ensuring election year advocacy efforts remain nonpartisan](#)
- [How 501\(c\)\(3\)s can talk to candidates in an election year](#)
- [501\(c\)\(3\) charities and ballot measures](#)
- [Lobbying under the insubstantial part test](#)
- [Elect to measure your lobbying using the 501\(h\)-expenditure test](#)

Access these election resources and NAMI templates at: [vote4mentalhealth.org/get-involved/](http://vote4mentalhealth.org/get-involved/).