

Indivisible Endorsements:

A practical guide for endorsing in local, state, and federal elections

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2020 Endorsements Guide

The original [Indivisible Guide](#) focused on how to act locally to influence your elected officials. This guide focuses on how to act locally to hold them accountable at the ballot box -- and in some cases, how to replace them.

2018 was a banner year for Democrats up and down the ballot. Voter turnout for a midterm election was the highest it's been in over 100 years. We took back the House by gaining an unprecedented 41 seats. We flipped 7 governorships and 6 state legislative chambers. We took the fight to the ballot box and won (feels good, right?).

It was also a banner year for our movement. None of these electoral victories would have been possible without the incredible hard work from Indivisibles across the country. You pushed candidates on the issues that matter. You knocked doors, phonebanked, and held candidate forums. And you made sure that the people who power our multiracial, grassroots coalition came out to vote. Your energy and dedicated organizing changed the game.

Last year, we also saw Indivisibles wield the formidable power of endorsements. Local groups made hundreds of endorsements, using people power to elevate progressive candidates and help them win. We also debuted our National Endorsements Program, endorsing 74 candidates (nominated by local groups) at the House, Senate, and Gubernatorial levels. And though some of those endorsements -- especially in primaries -- resulted in some really difficult conversations, we emerged stronger and ready to win in November.

But we all know our work isn't done. Come 2020, it's even more important that we defeat Trump's plutocratic, white supremacist cabal. This election will determine not only the Presidency, but also who will sit on the Supreme Court, whether Republicans can gerrymander our districts for 10 more years, and whether we can end the filibuster and implement a truly progressive agenda.

First, we must protect our gains and retake the reins of power. We may have won the House, but the Senate, the Presidency, and seats further down the ballot are up for

Who is the document by and for?

We: Are former political campaign hacks who have worked on local, state, and federal elections.

You: Are an Indivisible group leader or member looking to build your power.

What: This guide aims to demystify the candidate endorsement process, including for (gasp!) primaries.

Why: Done right, endorsements are a critical tool for applying and growing your Indivisible group's political power.

grabs. Beating Trump and his lackeys is a general election goal, and it's absolutely necessary to repel far-right forces for good.

Second, we must recognize that anti-Trumpism alone won't cut it. We need leaders who will not just be anti-Trump, but who will staunchly rise up for progressive values and stand indivisible with us all. That means we have to care about who wins not just the general election, but primaries as well.

We know elections -- especially primaries! -- can be intimidating. We also know that an endorsement, done correctly, is one of our most powerful tools for change. This guide demystifies the process, with advice on how best to engage in both primary and general elections.

We can repeat the successes of 2018. We can make sure the Blue Wave is not an anomaly. Indivisibles, acting in concert with millions of people around the country, have the potential to make the difference in 2020 and ensure a more equitable and progressive future for our country. We know that when we fight, we win, and we can't wait to keep winning with all of you.

Guide Summary

PROLOGUE: 2018 Success Stories

CHAPTER 1: Why Candidates Care about your Indivisible Group

What the campaign needs to win: people, media, money. Campaigns are focused on one thing: winning. They win by getting votes. They get votes by acquiring and deploying three resources: people, media, and money. Understanding this should help your Indivisible group productively engage with campaigns.

Why campaigns covet Indivisible group support: Indivisible groups are unique because you are real, locally-based, engaged constituents. That is rare, and it can mean political power for your Indivisible group. Candidates seek out Indivisible group support because they recognize it will bring people, media and/or money. Your support is valuable, and Indivisible groups should treat it as such.

CHAPTER 2: What Makes Your Group's Endorsement Powerful?

Indivisible group endorsements are about mobilizing people, media, or money. Indivisible groups only have power with political campaigns if they mobilize key

resources to help those campaigns win. We talk about what an endorsement is and why the process of endorsement is important for determining how you engage in a campaign.

What your Indivisible group offers a campaign. Defining which key resources the group will mobilize in support of an election outcome.

What your Indivisible group achieves. Wielding and growing political power beyond elections.

CHAPTER 3: Why Your Indivisible Group Should Consider Endorsing in Primaries

We've heard from some groups worried about possible pitfalls of engaging in primaries. This section walks through some of the benefits of the primary system, and some best practices for ensuring primary endorsements don't cause ill will.

CHAPTER 4: Factors to Consider when Endorsing a Candidate

What do you care about? Who is the candidate? And, how strong a candidate are they? These are the kinds of questions your group will have to answer to endorse. We walk you through how to answer them.

CHAPTER 5: How to Make an Endorsement

Step-by-step advice on how to endorse and when. We take you from initial candidate conversations, all the way through the decision-making process and finally, the endorsement itself. And we walk through common pitfalls organizations run into when making these important statements of position and value.

- a. How to Interact With Candidates and Gather Information
- b. How to Endorse / How NOT to make an endorsement

CHAPTER 6: Taking Your Endorsement National

Once you've endorsed a candidate locally, you'll have the option to nominate them for a national endorsement. What does a national endorsement mean for your group, and why should you seek one out? What is the process? We go into details of our national endorsements program.

PLEASE NOTE: How you engage in elections depends a lot on your group's organizational status. This guide is intended for local groups that can engage in political activity, including: groups that are currently unincorporated and haven't sought any formal entity status, groups that have formed 501(c)(4) organizations, groups participating in Indivisible's Distributed Fundraising Program (which generally follows 501(c)(4) spending rules), and groups that have formed political organizations (i.e., 527 organizations or PACs). This guide is not intended for 501(c)(3) organizations as 501(c)(3)s are prohibited from engaging in partisan political activity, including endorsing candidates.

Political spending can trigger campaign finance rules and reporting requirements, so if you have questions about specific political spending that your group would like to do, please consult with a campaign finance attorney who can help you plan for compliance.

2018 Endorsement Success Stories

When we launched the first version of this endorsement guide in November 2017, our goal was simple: to give Indivisibles the tools they need to wield power in the electoral process. Over the course of 2018, we saw how local groups across the country took this guide and put their own spin on it. We've seen groups use endorsements as a powerful tool in both primary and general elections, in red, blue, and purple districts, in open seats and seats with an incumbent.

We talked to Group Leaders to hear how they used endorsements and why it was the right tool for them. We've also added anecdotes and photos from these Group Leaders throughout the guide. As you think through the role endorsements will play in your group this cycle, we hope these stories will be helpful.

Indivisible Action Tampa Bay - Christine Hanna

Endorsed Candidate: Andrew Gillum for Governor (FL)

Indivisible Action Tampa Bay was one of the earliest supporters of Andrew Gillum's long-shot candidacy in Florida's Democratic gubernatorial primary. Mayor Gillum earned their endorsement in April of 2018 with 82% of their group's vote, but they were interested in Gillum as early as July 2017. The group submitted Gillum for our national endorsements program, and by July 2018, we were happy to endorse him nationally. That's when we hit the ground running. Building on Indivisible Action Tampa Bay's diligent work knocking on doors, making phone calls, and sending texts, the national team directed considerable resources toward earned media (press) assistance, digital advertising, and mailers in support of Gillum's candidacy.

Gillum's come-from-behind primary win surprised Florida's party establishment and invigorated the progressive grassroots. "There is no way in hell he would have earned the nomination if it wasn't for us. Our group did that," says Group Leader **Christine Hanna**. She feels that endorsing in the primary not only gave early validation to an underdog candidate, but also gave the group a significant head start in organizing a ground game.

"The Democratic Party doesn't do anything in the primary in Florida - they don't get involved. So our goal was to build an army of people that candidates could just plug into once nominated," she said. They knew their turf, were trained on canvassing, and were willing to do the work when the party was nowhere to be found. Gillum ultimately lost to Republican Ron DeSantis by a fraction of a percent - about 30,000 votes out of over 8 million cast. But he was the right candidate to build the multiracial coalition we'll need to win Florida in the long term, and he's still doing that work today. Hanna considers the endorsement a victory: "It's about having the conversations at the door. It's about doing the right thing and living our values."

Indivisible NW IL-Crystal Lake - Evelyn Malone

Endorsed Candidates: Lauren Underwood (IL-14) and Sean Casten (IL-06)

Indivisible Crystal Lake first started seriously thinking about endorsements when the first version of our Endorsements Guide was released in November 2017. It was something they had considered, but lacked a framework to make it happen. As they worked their way through the guide and followed its steps, Group Leader **Evelyn Malone** says it became apparent that “we didn’t really have anything to lose by endorsing.”

After the Illinois primary, and after a process that lasted about 10 weeks, they endorsed both Lauren Underwood and Sean Casten in their respective House races. Both went on to defeat their Republican opponents, flipping the seats after decades of Republican dominance. The group still stays in regular contact with both Congressional offices, and members continue to attend town halls and other in-district events, ensuring a responsive elected.

Indivisible Lumpkin - Marisa Pyle & Judy Kreps

Endorsed Candidate: Josh McCall (GA-09)

When Indivisible Lumpkin first heard Josh McCall speak, they knew he had something special. “He was incredible. Literally anyone who spoke to him or listened to him was a convert,” says Group Leader **Judy Kreps**. The only problem was Georgia 9th is deeply red territory. It’s an area that, according to Kreps, the state Democratic party has written off for years, and rarely spends any time or money on.

But that didn’t stop Indivisible Lumpkin from organizing. After inviting both McCall and his primary opponent to their regular meetings, the group voted on an endorsement with a threshold of 2/3rd of the vote. They almost unanimously endorsed McCall. They hit the doors hard, and ultimately McCall saw a 4% swing for Democrats on Election Day. Organizing in deep red turf like this can help Democrats upticket on nailbiter races -- the Georgia governor’s race was decided by only 55,000 votes. As Group Leader **Marisa Pyle** said, “We are not in our lifetime going to flip that district. But 4% is important -- that’s a win.”

Long Valley Indivisible - Brenda Sheeder Nast

Endorsed Candidate: Tom Malinowski (NJ-07)

In this northern New Jersey race, local grassroots organizations joined together to form an umbrella coalition called NJ7 Forward, focused on defeating Republican incumbent Leonard Lance. Long Valley Indivisible was among several Indivisibles in the coalition.

Group Leader **Brenda Sheeder Nast** felt that working in concert with other groups “definitely was a huge advantage, and it really did make our work easier.” She recalls that there were 7 excellent candidates in the Democratic primary, and being part of the coalition allowed the group to spend more time engaging voters, while the broader coalition took care of pre-screening candidates and hosting debates. By the time of the primary, there were 3 candidates left in the race. Among them was Tom Malinowski, who won the nomination, the coalition’s endorsement, and ultimately defeated Lance. Just because your group is small doesn’t mean you can’t have a significant impact on elections -- working together with allied groups can grow your influence.

Indivisible Valley of the Sun - Pinny Sheoran

Endorsed Candidate: Hiral Tipirneni (AZ-08)

Indivisible Valley of the Sun endorsed Hiral Tipirneni in her race to take on Republican Debbie Lesko, who had won a special election for the seat earlier that year. Group Leader **Pinny Sheoran** felt that, while the process did reveal different preferences among group members, the endorsement ultimately solidified Tipirneni’s position in the race. She describes it as “like a job interview for candidates, because they’ll be working for us!”.

Her biggest piece of advice is to stick to a fair and transparent process for evaluating and voting on candidates, so you can endorse based on reliable data. Although Tipirneni came up short in November, she outperformed expectations and made solid inroads in a district long held by Republicans. As the national party starts to take interest in newly competitive districts across Arizona, Indivisible Valley of the Sun is ready to hit the ground running in 2020.

CHAPTER 1: Why Candidates Care About Your Indivisible Group

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It is far better to be free to govern or misgovern yourself than to be governed by anybody else.

—Kwame Nkrumah

”

Campaigns exist to win. To do this, they mobilize all the resources at their disposal to get their supporters out to vote. Whether the candidate is a seasoned campaign professional running for her second term as Governor or a first-timer looking at challenging the incumbent in a local school board race, every campaign relies on the same basic tools and building blocks for success. This chapter explains what your local candidate’s campaign HQ is thinking, and how your Indivisible group factors into their thinking.

What the Campaign Wants

Campaigns win by mobilizing people, media and money. The specific tactics that campaigns use for fundraising, communications, and volunteer coordination will vary depending on the circumstances of the campaign and the campaign manager’s personal style. But, when coupled with messaging, these three elements are the foundation of every campaign.

- People: When you get right down to it, people are the most important electoral resource. People vote and are crucial to turning out other voters. They phonebank, canvass, staff campaign offices, recruit volunteers, build word-of-mouth excitement, orchestrate people- and media-attracting events, and donate. Pretty much anyone who’s worked a campaign will tell you that at the end of the day, the single most valuable resource is an engaged, supportive constituency.
- Media: Media is all about getting a favorable image of the candidate out to voters. The average congressional district has about 700,000 people and many Senators

represent millions of constituents. The quickest way to reach the most voters is through media exposure, both “earned media,” and “paid media.” Campaign ads are one of the better-known forms of media. We’ve all seen them. They range from inspiring to corny to downright despicable.

In addition to this “paid media” of advertising, campaigns also seek “earned” media. Earned media is free media coverage of the candidate speaking at events, taking a stand on a policy issue, or giving interviews to the press. Candidates are relentless in seeking out earned media and extremely careful about crafting their image through these opportunities. Local Indivisible groups are well-positioned to generate opportunities for earned media coverage that the candidates wouldn’t otherwise have.

- **Money:** Like it or not (we don’t), money in politics is a reality. The average winning campaign for the House of Representatives costs \$1.3 million. The cost of the average Senate race is \$10.4 million! Candidates (and incumbent elected officials) spend a TON of their time raising money so that they can afford to actually run their campaign.

You can tell a lot about a candidate from where they get their money. Some campaigns are largely fueled by small-dollar donations. Most candidates spend literally hours every day cold-calling rich people and asking for money. Often campaigns rely on Political Action Committees (PACs) that represent corporations or interest groups. For federal election candidates, you can find out who butters their bread at Open Secrets -- just search for the candidate’s name to find past and current lists of donors.

Different Campaigns, Different Mindsets. Campaign professionals are used to working across a range of different types of races. Some of these differences will be familiar to many voters: elections can be statewide, like races for Governor or Senator, or confined to a single geographic district. They can be federal, where the winner moves out of state to represent their constituents in Washington, or take place on a state or local level.

Just as important as whether a race is state or local is what type of election the candidate is running in. There are a few key types of elections:

- **Primary elections with an incumbent** are elections in which a new candidate is challenging a member of their own party who currently holds office. Incumbents often build up large campaign bank accounts and endorsements to scare away primary challengers. But they know that turnout in primaries is much lower than in other elections, and so results are more unpredictable than general elections.

- **Primary elections with an open seat** are primary elections without an incumbent. These primaries happen when an incumbent chooses to resign, leaving a seat open, or in cases where one party will be challenging an incumbent of the other party in the general election. While front-runners often emerge, open primaries are often real free-for-alls, attracting multiple candidates. For this reason, and because turnout is usually low, no race is more unpredictable than an open primary.
- **General elections with an incumbent** are elections in which a candidate challenges a current officeholder from another political party. Typically, this will involve Democrats challenging Republicans or Republicans challenging Democrats, but general elections can also include Independents, as well as Libertarians and Green Party members. Generally, candidates will move to the center politically in the General, but every state and district are different. [Cook Political Report](#) is a great resource to take the political temperature of your state or district.
- **Open general elections** are elections without an incumbent. In these cases, both major parties usually field candidates that they've chosen through a primary election. These candidates then face each other, along with any candidates from other parties, in the general election. General elections are typically, but not always, held in early November.

Why Campaigns Care about Your Indivisible Group

Indivisible groups are a legitimate source of political power. While money flows into campaigns from just about every direction, independent groups of locally-based, engaged constituents are quite rare in American politics. Campaigns ignore individuals or organizations without real people power all the time. Indivisible groups around the country have demonstrated that they have real people power that is impossible to ignore and that they're committed to progressive action.

Your Indivisible group's support is valuable. Campaigns seek an Indivisible group's support -- either informally or through an official endorsement -- because it will help them get money, media, or people.

Because of the value of your group's endorsement, you should think carefully about how to engage with candidates, how to make these decisions, and what type of campaign support you can commit to providing if you decide to support a candidate. Read on -- that's the subject of Chapter 2.

CHAPTER 2: What Makes Your Group's Endorsement Powerful

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We just have to convince other people that they have power. This is what they can do by participating to make change, not only in their community, but many times changing in their own lives. Once they participate, they get their sense of power.

—Dolores Huerta

”

An endorsement is a formal way of signaling and mobilizing your Indivisible group's support for a candidate. Powerful endorsements are not empty statements, but real commitments that promise concrete actions by your group and members.

This chapter goes deeper on *what* a candidate endorsement is; *what* the campaign gets from your endorsements; and *what* your Indivisible group can achieve by using endorsements.

The Three Features of a Powerful Group Endorsement

Candidates receive endorsements from a wide variety of sources—community organizations, celebrities, labor unions, business leaders, and even other candidates. So what exactly does an endorsement mean?

A powerful endorsement is three things:

1. A public, definitive, stated preference. Endorsements are a stated preference for one candidate over any other, despite whatever disagreements your group may have with the candidate. Once you endorse, you must stand behind your candidate. If you endorse a candidate and then break with them later, you'll find your endorsements are less meaningful in the future.
2. A commitment of tangible support. Powerful endorsements come with a commitment from your group and members to actually *do* something meaningful in support of the candidate. If your endorsement is just words on a

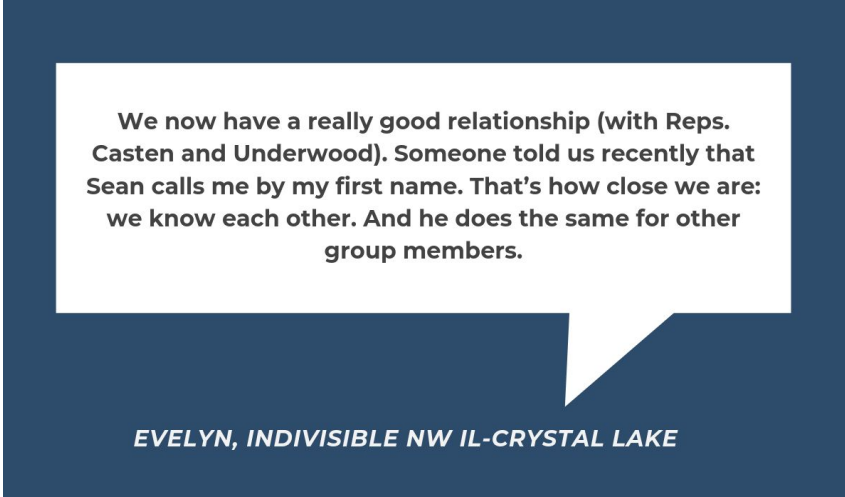
page, you'll quickly find that nobody cares about it. Support here doesn't mean money; Indivisible has shown that our foremost power is in our people.

3. A distillation of your group's values. Endorsements aren't just about the candidate -- they're also about what your Indivisible group stands for. A powerful endorsement requires that your group clarify your own values, and evaluate how those values line up with different candidates and campaigns.

Six Big Things Your Group Achieves by Endorsing Candidates

By flexing your political power through endorsements, you're developing and growing a muscle. Affirmatively getting behind candidates has several benefits for your Indivisible group and, well, the basic functioning of our democracy (thanks!). These include:

1. **Creating meaningful pressure for your preferred policies.** By endorsing, you're rewarding candidates who share your values and policies -- and creating incentives for the ones who don't to change their approach. And elections aren't just about the person on the ballot today, they're about everyone who holds elected office. When elected officials know they are going to be challenged electorally, they alter their approach to better respond to that challenge. If you want a non-responsive elected to change her position on an issue or hold a town hall, a great way to achieve that is by very publicly announcing that you'll *only* support candidates that meet your standards on those fronts.



We now have a really good relationship (with Reps. Casten and Underwood). Someone told us recently that Sean calls me by my first name. That's how close we are: we know each other. And he does the same for other group members.

EVELYN, INDIVISIBLE NW IL-CRYSTAL LAKE

2. **Building stronger relationships with electeds.** Do you know who electeds are eager to meet with and work with? People who showed up in the last election. If your group endorsed a winning candidate in the last election, they'll view you as a friendship to be nurtured. This is true even if you endorsed someone else in the primary -- if you wound up endorsing them in the general and showed up in support at the end of the day, you'll have a stronger relationship with them when they're in office. And that makes it easier to hold them accountable; they want to make sure you show up for the next election.
3. **Energizing your members and building your group's shared purpose.** Engaging as a group in an election gives your members a collective goal to work

towards and interesting new challenges to take on. On the flip side, if you don't get involved in elections, it's possible that a lot of your members will end up doing so on their own anyways -- diverting energy outside of your group.


4. **Contributing to the functioning of democracy.** Look, democracy is all about choices. If 95% of races with incumbents only give voters a single choice, it's not much of a democracy. Give people an actual debate, an actual discussion, an actual say in who their elected officials are, and you'll be strengthening democracy. When you endorse candidates, you help foster that debate.

5. **Having fun.** Campaigns are fun! They're a great way to meet new people, take on new challenges, and learn new skills. After months of advocating for your electeds to listen, you get to wield electoral power and *make* them listen. It's a blast.

6. **Possibly winning.** Well duh, right? Your group's endorsement very well may put your candidate over the top. Especially in local elections and primaries -- and sometimes even in statewide

elections -- small groups of people can absolutely alter the outcome of the race. Winning can come with a whole host of additional benefits. You can say you were part of a winning coalition and build your group's leverage. Elected officials, including your endorsed candidate, will take note of your group's people power when hearing your concerns in the future.

But there's a reason winning is at the bottom of the list. Don't count on it. Winning is great! But it's far from the only reason for your Indivisible group to get engaged. Even if you don't win, you might force Republicans to spend time and money defending a seat, turn out voters for other races on the ballot, or set up your candidate for a win next time around. Endorsements make you a player, whether you put somebody in office or not. That's pretty cool.



People were coming up and over mountains, 45-minute drives, they were coming in, and we were sending out teams for canvassing. It was freaking amazing. People were energized. People were so excited, they were passionate and we have this network now and a ground game that we never had before.

JUDY, INDIVISIBLE LUMPKIN

What Your Group's Endorsement Offers a Campaign

As discussed above, campaigns aren't just being nice when they ask for your endorsement. They want your help getting people, media and money. So when

considering an endorsement, it's important to recognize your strengths in these areas. We'll take these in the order of strongest to least strong.

Indivisible Resource #1: People.

Indivisible is a movement of people, so the first and most important thing you can contribute is people power. An endorsement should signal that people in your group are excited to show up and work to support the candidate. This is crucial because campaigns depend on motivated volunteers throughout the campaign cycle -- from the Primary to General Election Day.

People power can come in the form of direct volunteer support for the campaign or as independent volunteer efforts run by your group. These activities may include:

- Voter registration drives
- Knocking on doors, phone banking, and other voter outreach
- Bird-dogging opponents
- Get Out The Vote (GOTV) efforts, like training other volunteers and driving voters to the polls

Coordinating with candidates. In order to get the most of your people power, candidates and their campaigns may invite your group to work with them directly. But this could be a problem if your group wants to do its own independent spending (also called "independent expenditures" or "IEs") in that election. Groups that want to do IEs -- such as groups that are incorporated or groups in the Distributed Fundraising Program -- must avoid learning strategic, non-public info about a campaign's plans, projects, activities, or needs. Plugging into a campaign on a volunteer basis to canvass or phonebank is usually okay, but paying to send postcards to a list of voters provided by the campaign may be considered coordination. Indivisible's national electoral tools and program are designed to be independent of campaigns, so coordinating with a campaign could also affect your group's ability to use Indivisible-provided tools. It's important to think through your plans for electoral activity early on, so you're all set when campaigns come knocking.

Indivisible resource #2: Media.

Your group's endorsement absolutely should come with media support. These media activities may include:

- [Press release](#) announcing the endorsement
- [Op-eds](#) or [Letters to the Editor](#) to increase the candidate's name recognition
- Event hosting for rallies, forums, parties, and other media-friendly events. Read more on how to get the press to cover to your event [here](#).
- Building grassroots buzz through social media

Indivisible Resource #3: Money.

Let's be honest, Indivisible's competitive advantage is never going to be money. We're not billionaires and we're not big money interest groups -- we're just never going to be able to compete on that level. But there are still ways to contribute productively to campaigns. Good candidates like to trumpet their small-dollar donations. It's a way not just to raise funds, but also to signal to the outside world that they are legitimate. Campaigns will often report the *number* of donors, not just the total amount raised -- that's why campaigns sometimes ask you and other individual Indivisible supporters for just a couple of dollars.

We'll have more guides in upcoming months about getting involved in the ways outlined, but in the meantime, you can reach out to field@indivisible.org to get connected with an Indivisible Organizer.

Note: *Raising and spending money around elections can trigger tax and campaign finance rules, as well as reporting requirements. This is especially true if your group is raising or spending money collectively, instead of on an individual basis. Campaign finance laws vary at the local, state, and federal levels, so it's important to check what laws might apply before engaging in political fundraising or spending. Depending on your group's entity status and familiarity with campaign finance laws, you may not want to risk the legal and financial headaches that come with collectively donating to a candidate or spending money independently to promote a candidate, but you can always encourage your group members to consider making individual donations or to volunteer their time to a campaign. If your group is not incorporated but is interested in spending money on federal elections, you might be interested in our Distributed Fundraising Program.*

CHAPTER 3: Why your Indivisible Group Should Consider Endorsing in Primaries

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You don't make progress by standing on the sidelines, whimpering and complaining. You make progress by implementing ideas.

—Shirley Chisholm

”

It's common to worry about negative effects of primaries, like division or nastiness. But the reality is that primaries are as healthy and constructive as we make them. In a good primary, there's a robust campaign and a healthy exchange of ideas, allowing for the best candidate to carry the nomination into the general election. And in a healthy primary, everyone unites behind the nominee at the end of the day. This chapter is about how your group can make that happen.

Four Things Primaries are Good For

First, let's talk about the role that primaries play in our democracy. Primaries accomplish the following things:

1. Generate a healthy debate of ideas.

Without primaries, the only debate in the public square will come during the general election. And let's be honest -- one party has been taken over by a far-right, white supremacist cabal. This means you're not usually going to get a very good debate about policy in the general election.

The primary creates a space for candidates to talk about who they are, compare their visions for the country, and debate different policy ideas and priorities. If you want to talk about Medicare for All, or how best to stop climate change, or reforming criminal justice laws, these types of debates usually happen in the primary. And if you want to ensure the candidates who ultimately take power share your values -- well, that's decided by who wins the primary. A general rule of thumb is that candidates tack to the center

during a general election. So if you wait until the general election to seriously engage with candidates about their policies, you'll have less of a chance to influence them.

"Help! My progressive candidate is becoming a conservative in the general!"

In many states and districts, strong progressive candidates tack to the center during the general election to try to win over independent voters. While messaging may change between a primary and general, you don't want a candidate who abandons her principles as soon as the primary is over. That's why primary elections are so important for getting candidates on the record before they feel the need to shift to the right during the general. Only in extreme cases should you consider rescinding your endorsement of a candidate -- generally if they have taken a new position in opposition to your group's core values.

2. Strengthen the general election candidate.

Every election cycle, at least a few candidates who look great on paper turn out to be duds. The primary process ideally eliminates these folks before they lose in the general. Competitive primaries work as a "stress test," forcing candidates and campaigns to seriously consider what it will take to win, uncovering anything problematic in a candidate's background, and confirming that a candidate really has what it takes. And because a competitive primary forces candidates to start earlier and work harder, winning nominees tend to be stronger, more experienced candidates by the time they get to the general election.

This is borne out by the evidence, which suggests that having a greater number of candidates in a primary race correlates with a stronger eventual party candidate.

"We knew the canvassing teams, we knew the territory, we'd already gone through the neighborhoods and had a lay of the land. It was easy because we had a vested interest from endorsing in the primary and there was a feeling of, 'OK, we have work to do. The Party is nowhere, but we're in this.'"

—CHRISTINE, INDIVISIBLE ACTION TAMPA BAY



3. Build momentum for the general.

Political campaigns aren't born with a fixed amount of money, volunteer hours, or overall enthusiasm -- for good campaigns, these are renewable resources.

Primaries are an opportunity to energize people and build a strong campaign earlier in the year. Voters will have more time to get to know the candidates, learn their platforms, and (hopefully) interact with them throughout the primary process. Starting this ramp-up of voter enthusiasm and investment in an election early in the year will help ensure progressives are ready to go for the general election.

4. Ensure a more responsive elected.

There's a reason why Indivisible groups' advocacy gets results. It's because your electeds know that they will have to face you eventually when they run for reelection. And the risk of a primary tends to keep electeds -- even the ones in very safe seats -- on their toes and makes them more responsive to constituents.

If your elected representative has been genuinely non-responsive, or out of line with your values, considering endorsing a primary challenger shows them that there are consequences of failing to stand indivisible with you.



“[Malinowski] has been really accessible. During recess, he had coffees and town halls. I think he knows he wouldn't be there without the support of grassroots groups.”

—BRENDA, LONG VALLEY INDIVISIBLE

The Tea Party

So many of us woke up on November 9th wondering, “How did we get here?” While the answers to that question are complex -- and would take a full US history class to address in totality -- the Tea Party deserves a lot of the credit (or the blame) for the current state of American politics.

The Republican party has been [moving to the right for decades](#), but the Tea Party accelerated that rightward shift. Since 2010, Republicans in Congress have known that they could face a primary challenge if they fail to uphold extremist principles on everything from Obamacare repeal to abortion. [That year](#), establishment politicians faced challenges from upstart Tea Party candidates in both open primaries and primaries with an incumbent Republican. We don't agree with their politics, but there's no denying that the Tea Party was successful at moving the Republican Party to the right. Similarly, Indivisible's grassroots power in every district gives us the chance to move the entire national conversation to the left.

Three Key Principles for a Productive Primary

Not all primaries are created equal. You can engage in a primary and fail to have the impact you want. There are three key rules to follow to productively engage in competitive primaries as an Indivisible group.

1. No personal attacks.

Primaries work when they focus on ideas and policies, not personalities. If your group's effort to talk about a primary devolves into personal attacks on individual candidates (or each other), that's a warning sign you're not ready to endorse. If your group isn't sure if you're ready to endorse, our Organizing team is always on hand to talk it through (reach out by emailing field@indivisible.org).

2. Have clear, transparent rules about how you'll make decisions.

One of the most common ways for primaries to get messy is if people feel they weren't heard or the rules weren't fair. You can avoid this by having a clear, transparent process

"As part of the endorsement process, one of the questions we asked is 'If you didn't get the candidacy, would you support the winning candidate?'"

—PINNY, INDIVISIBLE VALLEY OF THE SUN



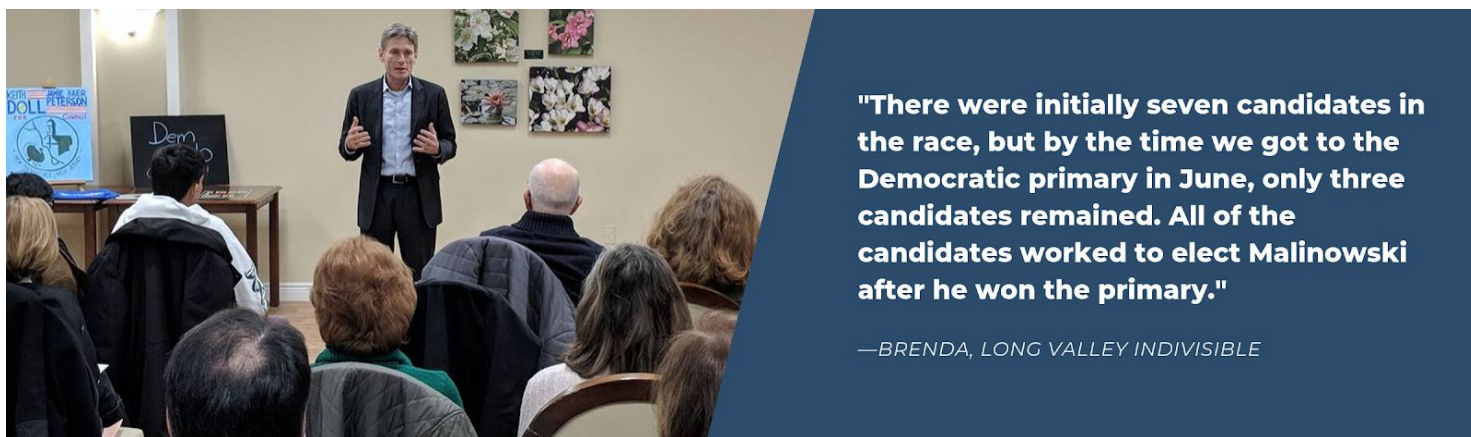
(see next section for guidelines on this). And one key part of this process is ensuring that...

3. **Everyone** commits to supporting the nominee in the general election.

Emotions in primaries can run high. People get attached to their candidate and reasonable Indivisible members may disagree. But at the end of the day, we're all here for a reason: we're taking our country back from the plutocratic, white-supremacist forces currently in control. We asked the Presidential candidates to sign our [Indivisible Pledge](#), and we should approach other primaries in the same spirit: we *must* win general elections, and that means supporting the eventual nominee, even if they weren't your first choice.

To help unify and mobilize your group, you may consider hosting an Indivisible rally on the day **after** the primary election to throw your full support behind the general election nominee and start gearing up for November. You can even ask that your endorsed nominee commits to attending the rally, whether they won or lost the primary.

Reiterating this shared mission from the beginning -- and committing to endorse the winner of the primary as part of your decision-making process -- helps to reduce the risk that a primary gets divisive and turns people off. This is how we continue standing indivisible after primaries. This is how we win.



"There were initially seven candidates in the race, but by the time we got to the Democratic primary in June, only three candidates remained. All of the candidates worked to elect Malinowski after he won the primary."

—BRENDA, LONG VALLEY INDIVISIBLE

Myth vs. Fact on the Primary System

Myth	Fact
<p><i>Primaries weaken candidates ahead of the general election.</i></p>	<p>Reams of evidence show that primaries actually result in candidates who are stronger in the general election. Primaries are a chance for candidates to build their campaign, practice making their case, and engage substantively on the issues that matter to progressives -- and that makes them stronger.</p>
<p><i>Can't we all just agree to fight Trump and the white supremacist uber-conservatives?</i></p>	<p>Yes! There's no conflict between fighting the Trump Right and engaging in primaries. At the end of the day, a general election between a Trump-supporter and a Democrat you have some quibbles with will be a no-brainer. It's crucial that all Indivisibles, whether or not they engage in primaries, recognize that ultimate goal.</p>
<p><i>Pushing a candidate too far to the left during the primary can hurt their chances in the general.</i></p>	<p>Primaries are about ensuring your Members of Congress are responsive to you, their constituents. If a candidate makes changes to their policy platform during a primary, they're being responsive to the wishes of their community.</p>
<p><i>Primaries burn campaign resources ahead of the general election.</i></p>	<p>There is no finite set of resources for a campaign. In fact, hard-fought primaries can elevate candidate name recognition, spur interest in a race, and lead to an influx of key small-dollar donations. Plus, they'll have a strong group of trained volunteers ready to talk to voters in the general.</p>
<p><i>Considering a primary endorsement will create divisions within your group that will weaken your organization.</i></p>	<p>Primaries can be emotional for groups and individuals -- and they're not right for everyone. But as long as the primary endorsement process is fair, and your group commits to supporting whoever the winner is in the general, the process can leave your group stronger.</p>

Primaries hurt the party.

Primary challenges certainly create headaches for the leaders of the party -- any challenge to power does that. But they also bring new blood into the system and prevent parties from growing stale. And primaries for open seats are a golden opportunity to debate new ideas and hear from new voices. If we want a strong Democratic Party, primaries are a necessary part of the process.

CHAPTER 4: Factors to Consider When Endorsing a Candidate

“

The vote is the most powerful nonviolent tool we have.

—John Lewis

”

At the end of the day, you're endorsing a candidate because you think they're the best person to hold political office. But making that assessment involves thinking through a lot of factors about who the candidate is, what they stand for, and what their chances are. This chapter reviews key factors your Indivisible group will want to consider.

Values and Policies

Candidates should share your values and care about bold policies that your group does. What issues does your candidate focus on? What policies do they support? Do they share your values? In order to answer these questions, you may need to define for your own group what's most important. No one knows your community or your group better than you do, and no one can better assess if a candidate than you can. By clearly stating your values and preferred policies, and what you're looking for in an elected official, you can help shape the prominent issues in a race and push candidates to reflect your values.

When defining your values, it can be helpful to refer to our [2020 Grassroots Playbook](#), where we've outlined 7 core issue areas that we believe will drive the 2020 campaign.

Representation Matters

Public policy is better when the people at the table reflect the diverse range of backgrounds and experiences of our nation. Americans all have life experiences that impact their understanding of politics and policy, and every elected official -- people of

color, women, religious minorities, and disabled and LGBTQ+ -- brings their personal background to the table.



"Before we did anything externally, we organized internally. We wrote our goals and our values, and we didn't deviate from them. So when the candidates came along, we already had a plan in place: who we were, what we were looking for, what we were about. To this day, that's the kind of group we are. We're not a big group, but we are bonded."

—EVELYN, INDIVISIBLE NW IL-CRYSTAL LAKE

Today, straight white men make up the vast majority of the U.S. House and Senate. This is a big problem, but it's not new and it's not an accident. Our government was originally structured to explicitly exclude participation from non-white and non-male Americans. Decisions are made by the people in the room, and for generations, that room was intentionally kept white and male.

This is bad for democracy, and a progressive movement working to represent the people must aim to do better. Even among those who hold progressive beliefs, unconscious biases can still impact our perceptions of women and people of color who run for office. Unfortunately, well-meaning attempts to "not see gender" or "not see race" can still wind up putting candidates who are not white men at a disadvantage. We have to consciously overturn the patterns of discrimination that have historically kept women, people of color, and other marginalized groups out of political power.

When contemplating making an endorsement, we encourage you to recognize the importance of seeking out and supporting candidates from underrepresented communities. While a candidate's race or gender will not be the only factor in choosing whether or not to endorse, we cannot ignore these factors if we want politicians who truly reflect our electorate and movement.

Viability/Electability - but only to a certain extent.

Viability (also referred to as electability) is how we describe a candidate's chances of winning. To be blunt, it's a buzzword for political hacks, and it's usually used to describe why some upstart candidate has no chance. The thing is, hacks are often flat wrong. Remember when Trump was considered totally not viable? Yeah. This is why we include the "viability" factor with some strong caveats.

In reality, the importance you place on viability depends on the local context and your Indivisible group's goals. If you're in a swing district with an open seat, there may be a dozen candidates in the primary, some much stronger than others. Understanding who's got a strong foundation can help you decide where to focus attention. On the other hand, if you've got a front-runner who's the overwhelming favorite but consistently votes against progressive values, you may want to endorse a longshot progressive candidate -- even if they don't have much of a chance of winning the primary.

Candidates anointed by a party -- both those recruited to run and incumbents -- aim to give the impression of invulnerability. This is a smart tactic, but no candidate is actually invulnerable. Even the most entrenched establishment politicians can be defeated by a challenger with a clear vision, strong fundraising, and excellent campaign strategy.

Typical component parts of viability:

- **Money:** The lazy political hack will look at money and little else. There are two main factors to consider here: the candidate's overall financial strength and the percentage of donations that come from small-dollar donors. For financial strength, what's most important is not exact dollar amounts but rather how each candidate is doing in comparison to the others. You'll want to look at current Cash on Hand to get a sense of campaigns' books. For federal elections, you can find candidate fundraising information on the Federal Election Commission's (FEC) [website](#). Federal candidates have to report their fundraising totals every quarter (this is why you get a barrage of fundraising emails in the final days of before a quarter ends - they're trying to goose their stats). For state elections (for Governor, Attorney General, State Senator, State Delegate, etc.), the information will be available on a state website -- usually your state's Secretary of State or Department of Elections page.

Just as important as overall financial health is the percentage of donations coming from small donors. As an organization, we believe that money in politics is a big problem and dilutes the voices of the American people. It is absolutely worth giving extra consideration to candidates with a strong record of small-dollar donations. People with the wealthiest friends or the ability to self-fund shouldn't be able to buy their way into a seat. We as a national organization will not endorse a candidate for federal office unless they have pledged to reject corporate PAC donations, and we encourage groups to do the same. The FEC website does list small-dollar vs. high-dollar donations, but [OpenSecrets](#) does a particularly good job of laying out this information in a clear manner. If a candidate does have a lot of big-dollar donations, it's also helpful to check out whether that money is coming from industries and companies who don't represent progressive values or good governance and labor groups.

- **Polling:** Polls seem objective -- it's just numbers! -- but the reality is that they move up and down significantly over the course of a race, and different polls may show very different results. Polling can be a tricky business, and like anything in

politics, candidates will try to use polls to their advantage. Upstart candidates will often release sketchy polls to establish that they have a chance, incumbents may trumpet their own popularity polls to show just how invulnerable they are.

In some races (particularly statewide races, like the Governor's race or a Senate race), there will be frequent public polling. In others, including some House races, Mayor's races, City or County Council elections, and State Senate or Delegate races, polling may be harder to come by. Some well-respected resources for both polls and general race monitoring include [Daily Kos Election Report](#), and [Cook Political Report](#). You can sign up on the Daily Kos website to receive their daily election updates, which give a great nationwide look at key races. Cook Political keeps a tracker on races for the US House of Representatives, Senate, and Governor, and updates once a week as we get closer to election day

- [Other Endorsements \(including other Indivisibles!\)](#): As you head into making your own endorsement decision, it's helpful to be aware of the landscape of endorsements for all candidates in the race. Endorsements that take into account other progressive movement partners will be even stronger for this collaboration.

It's also very important to consider how other Indivisible groups are approaching making an endorsement in the same race. In many congressional districts across the nation, there are more than one Indivisible group doing work on their home turf; your endorsement will be even more powerful if you coordinate on a fair process and end up uniting around the same candidate!

CHAPTER 5: How to Make an Endorsement

“

If you don't speak out, ain't nobody going to speak out for you.

—Fannie Lou Hamer

”

Chapters 1 and 2 discussed *why* campaigns care about your Indivisible group endorsement and *what* a powerful endorsement entails. Chapter 3 focused on the *when* -- whether you should get involved early in primaries. Chapter 4 looked at *what* factors you should consider when thinking about candidates and campaigns.

This chapter discusses *how* your Indivisible group can go about making that endorsement: from getting to know a candidate to issuing your endorsement statement, you'll learn what to do -- and what not to do -- when your group wants to throw its hat into the electoral ring.

“Along the way, as we proceeded through the chapters, we became encouraged to say, yeah, this is what we need to do. By the time we got to Chapter 5, we were ready. We were excited about it.” - Evelyn, Indivisible NW-Crystal Lake

Hopefully, you're also getting a better idea of whether an endorsement is right for your group.

Given this chapter's length, we want to give you some clear landmarks for what we'll be covering. Below is a quick overview of what this chapter explores.

- How to Set Up Your Endorsement Process
 - Create a Fair Process
 - Determine If/When You'll Endorse
 - Team Up with Other Local Indivisibles
- Create a Timeline

- How to Interact with Candidates
 - Do Your Research
 - Introduce Your Group
 - Gather More Information
- How Make the Endorsement
 - Hold an In-Person Meeting
 - Set Up an Online Vote
- Announcing Your Endorsement
- Sample Endorsement Process

This chapter is the longest for a reason: understanding these steps and establishing a formal process around endorsements is the most effective way to get involved in a race while maintaining the integrity of your group. Our Organizing team is happy to talk through your process with you -- reach us by emailing field@indivisible.org.

How to Set Up Your Group's Endorsement Process

Having a clear, fair process makes everything go smoother. In the weeks or months since your Indivisible group was established, you have had to make a number of internal decisions about how to operate. You've had to prioritize policy issues, choose which tactics to use to engage with your elected officials, and balance competing perspectives within your group itself. The fact that you are now looking to weigh in on politics by contemplating an endorsement shows that you've learned to work together as an organization.

As your group wades into electoral work, you'll need a similar fair, transparent process like you've used for legislative advocacy. Primaries are a healthy part of the political process, but they can still get heated. Most group members will be OK if their preferred candidate isn't chosen, but they won't be OK if they feel like the process was unfair. That's why it's vital that you decide on rules and internal policies for endorsements that are transparent, fair, and agreed upon ahead of time.

Step 1: Create a fair process.

All your internal processes should be open, transparent, and inclusive. Ensuring that everyone feels heard and respected throughout the decision-making process will make it that much easier for your group to hit the ground running following any endorsement you choose to make. Here are key questions to answer when setting up your internal

processes for endorsement (See Chapter 5: How to Make an Endorsement for more information):

- Who makes the decision on process? In general, the person(s) currently running your group are the people best suited to run this process and be the point person for the decision. The group leader may delegate this role if there is another person suitable within the group, but be mindful that the point person may wind up spending a lot of time defending and clarifying the process as well as defending the eventual decision. The group leader, or their designated representative, will roll out the process, administer the process, determine the decision based on the vote, and announce the decision internally and externally.
- Who can vote in your group? We would recommend that voting members be limited to people actively engaged with the group. Minimally, these are folks regularly attending offline meetings and events, but can also include people on other internal lists. You will have maximum buy-in from group members if you bring in the widest pool of people possible. That said, we err strongly on the side of not making voting open to publicly accessible venues like a public Facebook page, as these venues are susceptible to interference by candidates, their proxies, and trolls.
- How will you vote? Voting systems matter! Just ask Putin. Seriously, the way you vote can determine who votes and whether or not your members feel the process was fair. **Will you vote in person or online? Will the vote be anonymous or public?**
- What level of consensus do you need? We've been hearing from a number of groups that they're wary of engaging in a potentially contentious vote. One way to avoid that is to establish a required level of consensus your group agrees is fair from the get-go. **What is your voting system (ie 2/3 majority, plurality, consensus, etc.)?**
 - "We had set it up to have a two-thirds majority to win." - *Judy, Indivisible Lumpkin*
 - "We needed a strong majority to consider a candidate endorsed. If the majority wasn't strong, we looked at the strength of the votes in the actual district. We didn't have a strict threshold, it was more like a gut check that we were all on the same page." - *Christine, Indivisible Action Tampa Bay*
 - "We let people rank the candidates on their responses to our questions" - *Pinny, Indivisible Valley of the Sun*
- What happens to your group members who disagree? Except in the rare case where a group managed to achieve true consensus on a candidate, there will be some members of your group who would have preferred another outcome. We would recommend your group determine a plan for this in advance. One solution

can be to clarify in advance that though the group will put their endorsement behind a candidate, individual members are welcome to volunteer in their personal time with any candidate. However, it's critical that all group members agree to support the ultimate decision in their capacity as a member of the group -- leaving the debate and hard feelings in the deliberation space.

"Gillum's name was on the flyer we left at people's doors, but if our canvassers weren't feeling really pro-Gillum, they could still participate in the canvasses. They talked about the Senate race, or the County Commissioners races. We had a lot of canvassers that didn't support Gillum in the primary, but we as a group did. We worked side by side." - Christine, Indivisible Action Tampa Bay

- How will you roll the process out to group members? Last process question! You've determined all other parts of the process. Now you need to take the time to let your group members know that you are engaging in the primary, why that work is important, and what your structure and process will look like. Not everyone checks their email or attends the meetings, so it's important to be vocal about all of this in multiple places.



"Since we had over 5,200 members in the group, if you wanted to be on the Endorsement Committee, you had to sign up with your name, address, and email address. Then we sent out endorsement ballots to the Endorsement Committee members."

—CHRISTINE, INDIVISIBLE ACTION TAMPA BAY

Step 2: Determine in which races you're going to endorse.

Your thorough, fair, transparent internal process may reveal deep disagreements about the candidates in a given race. After the voting is done, your group may choose to stay out of an election altogether. That's fine! That's the whole point of a process. The important thing is that this is an affirmative decision your group makes using the fair, transparent process that you've all agreed upon. As your group considers whether or not to engage in an election, keep these two points in mind:

- Engaging in elections isn't an all or nothing choice. Your group's decision may be different for primaries than for the general election, and it may be different for local races than for federal races. You may endorse in your congressional election primary, only get involved in the district attorney general election, and sit out the school board elections entirely. This is all reasonable and should be determined by your group's process, not by anyone else.

“We learned pretty quickly that some candidates may not want our endorsement. And some simply wouldn’t be able to earn it. But Hiral really understood the power of our endorsement” - *Pinny, Indivisible Valley of the Sun*

- Your power, while mighty, is not limitless. There could be anywhere from a handful to dozens of races taking place in your area in any given election year. You likely won’t have the time or desire to engage in every single race. Before you begin the full endorsement process, decide how much capacity your group has. Endorse only when you’re confident you can commit real resources to the candidates you pick. This will likely limit the number of races you can engage in, but that’s OK! Choosing to begin the endorsement process in a race doesn’t necessarily mean you will wind up making an endorsement. But prioritizing your top races early in the process -- or deciding to stay out of endorsements entirely -- is the very first choice you should make.

“Our group’s area is comprised of Illinois’ 6th, 8th, and 14th districts. The 8th is a safe blue district. So we hosted 6 different candidates in the 6th district, and another 7 candidates in the 14th. And we got to know the candidates pretty well and asked ourselves which candidates aligned with our values” - *Evelyn, Indivisible NW IL-Crystal Lake*

When NOT to make an endorsement

Endorsing is not right for every group. Just as important as recognizing when to make an endorsement is recognizing when NOT to endorse. The prospect of getting to endorse a candidate can be thrilling. Still, it’s important to consider why you are endorsing and whether the process is working. If you’re not sure if you’re ready, you can reach out to field@indivisible.org to discuss further. If you find yourself falling into any of these categories, it means you’re not in the right place to endorse:

Don’t Make an Empty Endorsement

Are a lot of people in your group excited to work to support the candidate that you’re endorsing? If not, you’re not ready to endorse. Endorsements are a promise of hard work to come, and a commitment that your group is in it for the long haul. You don’t want to commit your group’s time and resources to a candidate you feel, at best, lukewarm about. Only endorse if your group members are enthusiastic about supporting the candidate -- in the end, it’ll come down to whether they’re going to work on the candidate’s behalf.

If you endorse just for the sake of endorsing, without enthusiasm from your group members, it could potentially undermine your power in the future.

Candidates will be less likely to actively seek your endorsement in future cycles if they can't be sure that you really mean it, and are committed to putting the weight of your organization behind helping get them elected.

Don't Create an Exclusionary or Unfair Endorsement

Endorsement decisions need to be inclusive. Your group members need to feel that the endorsement process was fair, transparent and accessible. If members feel like they were kept out of the process, either through direct exclusion or lack of consideration of special circumstances (transportation accessibility, late-night meetings for parents of young children, meetings held in wheelchair-inaccessible buildings, etc.), the endorsement process will leave a sour taste in their mouth.

It is important that your endorsement process reflects your group's progressive vision of inclusion and solidarity. If people feel the process was unfair or exclusionary, the endorsement process could potentially hurt your group. On the other hand, if people feel like the process was thoughtful and fair, they will be far more likely to accept the outcome, even if it leads to their non-preferred candidate.

Step 3: Team up with other Indivisible groups to stand Indivisible.

Strength in numbers. The only thing better than the endorsement of one Indivisible group is the endorsement of every Indivisible group in the district.

Indivisible groups across the country have approached coordinating with other groups in a variety of ways — and how Indivisible groups work together on endorsements will vary quite a bit as well. But we are stronger when we stand Indivisible--and that includes when endorsing candidates! There's strength in numbers and if you choose to endorse together, you can have an even greater impact. It is also important to make sure multiple groups aren't planning to come out with conflicting endorsements or messages without being aware.

"We were definitely able to put more of our group's organizing energy into local efforts, which helped us increase voter turnout and support for our candidate. We still managed to make our own endorsement, create literature, register voters, and organize Indivisible canvassing, but we could not have done all of those things without the coalition uniting the district's efforts."

—BRENDA SHEEDER NAST, LONG VALLEY INDIVISIBLE



Groups that work together will be more powerful because of it, and groups that endorse competing candidates may end up frustrated that they're butting heads with each other. Here are some things to keep in mind about coordinating:

- Reach out early. If you're planning to endorse in a race you share with another Indivisible group, it's a good idea to reach out to let other groups know - that way you can see if they have similar plans. It's okay and expected that different Indivisible groups may prefer different candidates -- we're all independent -- but you'll want to know that at the beginning. And if you talk about why you disagree, you may find a way to work through your differences, develop a shared process, and agree to support the same candidate.
- Consider a joint endorsement. Especially if there is a nearby group or groups you've successfully collaborated with in the past, consider coming together for an endorsement. In this case, you should work together to determine a decision-making process and make sure all group members are up to speed.
- Be clear on your group's process and values. Remember: before committing to work with another group, it's important to ensure your values and priorities in a candidate are similar. Take the time on the front-end to talk about what you're looking for, work out a process, and make sure the process is transparent for all your group members. If you'd like help connecting to other groups in your area, reach out to field@indivisible.org and an organizer from our team can follow up with you.

Endorsement Dos and Don'ts

DON'T	DO
<p>Bite off more than you can chew: For many groups, there will be over a dozen races that you could consider making an endorsement in. It can be tempting to weigh in on every single one, but doing so may drain your resources and cause you to burn out early in the election cycle.</p>	<p>Remember that your endorsement is as meaningful as the commitment behind it. Be careful and selective in the races you choose to get involved in, so that you have the time and energy to devote to each one.</p>
<p>Ignore other local Indivisibles: Your group should make the decision that is best for you and your members, but you should absolutely reach out to other local Indivisibles.</p>	<p>Coordinate with other groups in your area: Your endorsement will be even stronger in instances where you come to the same considered decision as others. Check in with your neighboring groups to see if they are considering making an endorsement, and coordinate whenever</p>

you can.

Endorse prematurely: Take time to determine *how* you will endorse and ensure your group members are on board.

Establish a realistic timeline for endorsement, and ensure you have group buy-in. If your group is not prepared to make a decision, can't decide how to make a decision, or is not invested in any of the candidates, you may not be ready to issue an endorsement this cycle.

Let a single person make the decision: Indivisible groups have been successful because of their people power. Don't dilute that power now by putting the endorsement decision in the hands of a single person.

Create fair and transparent processes for decision making. Make sure you are involving as many group members as is realistically possible in the decision-making process, and that everyone knows how the final decision will be made. Remember the importance of accessibility.

Relitigate fights from past elections: This election isn't a rematch of the last. Don't let your group become mired in old discussions of old elections.

Keep your eye on the prize: Remember to take a step back and focus on the actual candidates and actual issues up in this election.

Slack on candidate research: Endorsements are public and definitive. You don't want to be surprised at the last minute by information you could have found at the outset.

Gather all the facts before you make your decision. Make sure you head into the final decision with all the relevant facts.

Only follow the lead of other organizations: Looking into endorsements by other progressive organizations and grasstops leaders can be an element of your decision process, but should not be the only factor in your decision.

Consider other organizations, but make your own decision: It's helpful to see what other progressive organizations are saying to give context to your own endorsement, but make sure you are leading with your own values.

Create a Timeline

Endorsements are most meaningful when you leave yourself enough time to have an impact on the election. It's helpful to build a calendar backward from the election date, and figure out when to take action.

You will want to make your final endorsement four to five months out for general elections and at least two to three months out for primary elections. This means you need to give yourself enough time to reach out to other Indivisibles, conduct candidate research, send questionnaires and pledges, and schedule Q&A sessions prior. You should plan to give yourself at least a month to conduct this research. Candidates have busy schedules, so you will want to get any “asks” into them as soon as you can.

Sample Timeline - General Election

Below is a sample timeline you can use when designing a process for endorsements for a general election. This timeline can be adapted for a primary -- just bump it up another 4-6 months.

April

Week 1: Evaluate what races will be on the ballot, and determine where your group wants to spend your resources making endorsements. Coordinate with other Indivisibles in the area to see if they are considering making an endorsement in the same races and if they want to develop a shared process.

Week 2: Start doing research into candidate policies, teams, values, and viability

Week 3: Write candidate questionnaires and questions for Q&A sessions, if using.

Week 4: Reach out to all candidates to schedule Q&A sessions and find a point of contact to send questionnaires and pledges. Send campaigns questionnaires and pledges, start holding Q&A sessions.

May

Week 1: Finish any remaining Q & A sessions. Send around any collected research to all your group members, and consider sharing with other Indivisible groups as well.

Weeks 2 and 3: Allow your group time to review any collected candidate research, Q&A's, and questionnaires.

Week 4: Hold a vote on which candidate, if any, to endorse (this can be within your group alone, or in coordination with other local Indivisibles). Alert all group members about the results of the vote. Consider coordinating media statements with other groups as appropriate.

June

Week 1: Contact campaigns with the results of your endorsement process. Draft press release and begin media outreach on the results of your endorsement.

Week 2: Start gearing up for the general election. Begin planning out how you will work to help get your candidates elected, and get excited about the general

election. We will be providing more background on how to get this done in the coming weeks and months.

How to Interact With Candidates

Alrighty! So your group has done all the tough prep work. You've developed an internal process for endorsements. You've rolled that process out to your whole membership. You decided to explore making an endorsement in a race. And you've reached out to other local Indivisible groups to see if you can coordinate on the endorsement.

So now what? Well, now you've actually gotta talk with the candidates in the race! As with the internal process work, this is a simple 3-step process. Here's how: do your research, introduce your group, and have a conversation.

Do Your Candidate Research

Peek under the hood. Before reaching out directly to candidates or campaigns, you should do some research into the candidate's stated values and policy positions. Determining how well a candidate's stated policy stances match up with your group's values often requires some digging. Here are some go-to resources to review:

- Candidate websites. Almost every candidate has a section of their campaign website dedicated to "Issues." This is the first place to go to check out where the candidate stands on the issues that matter to you. Keep in mind, a candidate's website is friendly (or sometimes not-so-friendly) propaganda. Everything on there is made to sound good and make the candidate look great. That means that they may be incomplete, gloss over key questions, or not include information on controversial issues or positions.
- Press coverage. All incumbents will have press coverage of their positions, and many candidates will too if they're not total political newbies. Often candidates will purposefully or accidentally say things to press that they won't put on their website. No need to get fancy in your research - just use [Google News Search](#) and search for the candidate's name (and particular issues if that's of interest Tip: you can use this research process to get ready to do your own media outreach later. As you read local stories, keep track of the reporters who are writing them. You'll notice that the same four or five names keep coming up. Put those names in a spreadsheet, along with their contact information as you find it: this is your [media list](#). Those are the key reporters covering this race, and they're the same reporters you'll be in touch with later on.
- Past votes (for incumbents). Once you've had a chance to look over the information they release publicly, it's worth looking into their past positions. [GovTrack.us](#) has great resources that track current Members of Congress' past votes and positions. Finding this information can be more challenging for state and local level incumbents. [The National Conference of State Legislatures](#) has a

bill tracker you can use to find your legislator's position on a specific piece of legislation, and [LexisNexis](#) also has some strong state and local resources, but this is definitely a heavier lift, and you shouldn't be discouraged if finding this information is challenging.

Flip-flopper?

An important consideration of policy issues is the extent to which a candidate's views on policy have shifted over the years. Back in 2004, John Kerry was attacked for being a "flip-flopper." In 2012, Joe Biden and Barack Obama both evolved for the better on the issue of marriage equality, becoming champions for the right to marry ahead of that year's election.

Flexibility and a willingness to learn are crucial characteristics for a political candidate. At the same time, the consistency of values across a candidate's history is also important. That's why these kinds of shifts have to be evaluated on a case-by-case basis.

Your group will have to evaluate how much emphasis to place on a candidate's past positions. You don't want to discourage people from evolving and taking on better policy positions by dismissing it as flip-flopping. But if a politician has made a shift, it's important to understand why they made that shift and how they've put it into action in their words, decisions, and voting record if you're going to support them.

When looking at the inconsistency in a candidate's past statements, it can be helpful to see if those inconsistencies represent real learning and a willingness to admit mistakes on that candidate's part or if they mainly shift their positions only when it becomes politically convenient. At the end of the day, you should look for candidates who have a record of championing issues most important to YOU.

Introduce Your Group to the Candidates

The next step is reaching out to the campaign. It's usually a good idea to reach out to the press secretary or communications director as the first point of contact. If your candidate is issuing press releases, their name and contact information will often be at the top of the release. That said, depending on how early in the campaign you get in touch, they may or may not have a dedicated communications staff. If you can't figure out who to direct your initial query to, almost every campaign will have a "Contact Us" box on their website.

When you get in touch, be sure to come prepared with information about who your group is (mission, size, and focus). Campaigns don't have lots of time to research your

group, so you'll have better luck getting a response if you're clear and concise about why they should pay attention to you and what you want from them.

At this stage, you may not have decided whether you'll be supporting a candidate through independent spending or by coordinating directly with a candidate's campaign. Protect your options by making sure you don't receive any information about a campaign's strategy or tactics that isn't publicly available.

Once you are ready to start planning your electoral activity, explore our [Campaign Finance FAQs](#) for more on independent vs. coordinated spending to help you make an informed decision when the time comes. Keep in mind that campaign finance laws vary at the local, state, and federal levels, so it may make sense for your group to consult a lawyer before engaging directly in electoral politics, particularly if you're planning to raise or spend money on the election.

Hosting a Candidate Q&A Session

Whether or not you're planning to endorse, your group should find ways to get to know candidates better in person. If you want to invite candidates for a Q&A session with your members, remember to invite all candidates, not just member-favorites, and draft a pre-set slate of starter questions to ask all candidates. It's also a good idea to set a time limit on each Q&A session to make sure no candidate gets to spend more time with group members than others.

Finally, if you have already hosted these Q&A sessions, you know that weekends are often better for working parents than school nights, and providing a livestream of the event can help group members who may not be able to make it in person. Be sure to consider whether the ways that you're putting events together are making it as easy as possible for your members to be part of the process.

Note on Hosting Events with Candidates. In general, if you spend money on an event at which a candidate can advocate for their own election (or against someone else's), that spending will be treated as an in-kind contribution to that candidate, unless the event falls into a specific exception. We recommend that groups avoid spending any money to host candidate events unless they have received guidance from a campaign finance attorney about how to structure the event. One way to avoid campaign finance implications is to host a candidate event without incurring any expenses. For instance, a group may be able to avoid spending money on a candidate event if they invite a candidate to do a Q&A at the end of the group's regular meeting instead of hosting a separate event.

Remember these best practices to follow when interacting with candidates.

- **Be Inclusive** -- You should contact all candidates in a race, even if you're fairly certain from the get-go that their policies won't align with yours. In a primary race, this means you should reach out to all candidates -- even perennial "also-rans," or "stunt candidates." In the general election, you should absolutely

reach out to candidates from both major parties, and you should consider soliciting information from any third party candidates in the race as well.

“Josh actually had a primary opponent, and we invited them to come separately to speak at our regular meetings. Dave refused our invitation, but we did invite them both.” - *Marisa, Indivisible Lumpkin*

- Be Systematic in Your Process -- Fairness means approaching every campaign in the same way. If you put together a candidate questionnaire (discussed below), make sure you are sending the same questionnaire to every candidate. If you invite one candidate to speak to your group one-on-one for a Q&A session, you should invite all candidates. It's fine if not all candidates wind up accepting your invitation to fill out a questionnaire or participate in a Q&A -- what matters is that you offered all candidates the same opportunities to respond. It's also fine to impose some limitations on candidates you're willing to interact with or consider for endorsement as long as those limitations themselves are policy-related, clearly established, and fairly implemented.
- Stick to Issues -- Interactions with a candidate or a campaign are an opportunity to ask specific questions about the candidate's policies and values. By this point in the endorsement process, you'll know how a candidate is polling, how much fundraising money they're bringing in, and what their campaign team looks like. While this is all crucial information, it is best to focus on policies and values during interviews or on questionnaires. You should avoid getting any inside information from the campaign on strategy or tactics, and stay focused on the issues, not the campaign process.

Gather More Information

Beyond holding Q&A sessions, there are several ways you can interact with a candidate or campaign to get more information on the issues that matter most to you. You can send a campaign a candidate questionnaire, ask the candidate to sign a candidate pledge, or attend as a group events hosted and paid for by a campaign.

Send a Candidate Questionnaire: one of the best ways of getting information from a campaign on the issues that matter most to you is to send the campaign a candidate questionnaire. The process of assembling the questionnaire can itself help your group clarify what issues you're most focused on.

“We invited everyone from our group to join us to plan the questions we would ask the candidates, on issues that matter to us.” - *Pinny, Indivisible Valley of the Sun*

Designing your Questionnaire: so what issues should you include on your questionnaire? We all know there's a lot at stake this election. Democrats need to fix our democracy and reverse the damage done by the Trump administration. We've outlined the issues we're following closely in our [2020 Grassroots Playbook](#). We know these issues

aren't all-inclusive, but your group can use them as a jumping-off point for drafting your questionnaire.

Remember, these questionnaires are framed around the issues that matter most to your group; you don't need to include every issue, and some questions may be more important to your group than others. Think about what pushing forward a progressive agenda looks like in your district. A good place to start is identifying if your group has any "dealbreakers," issues on which the candidate must align to earn your endorsement. For example, in our national endorsement questionnaire, the candidate must support universal health care to pass.

When framing your questions, keep a few things in mind:

- The candidate is the one looking to earn **your** endorsement, not the other way around. Don't tailor a questionnaire to fit any one candidate, and don't feel like you have to compromise if a candidate doesn't align on the issues important to your group.
- A candidate shouldn't have to answer every question correctly to earn your endorsement, just the really important ones. The questionnaire is aspirational, written so that your ideal candidate would get a perfect score. In our national endorsement questionnaire, 80% is a passing grade, as long as the dealbreaker questions are answered correctly.
- Some questions are about getting candidates on the record. If you end up endorsing, you can point to these responses to hold the candidate accountable to their positions.

To help you plan your questions, take a look at our [National Endorsement Questionnaire](#).

Keep it Simple! Campaigns are overstretched and don't have a ton of people at the early stages -- so one poor staffer (or, in very local races, the candidate themselves) is probably handling all the questions that come in. It's common for campaigns to answer dozens of questionnaires from different organizations and interest groups, and it's actually a lot of work. Your odds of getting a response are higher if you minimize extra work: for example, ask 'yes or no' questions -- do you support Medicare for all? -- instead of asking them to write a paragraph. If multiple groups you're in touch with are sending in questionnaires, it's smart to coordinate on a single set of questions.

How to Make the Endorsement

After all group members have had an opportunity to review candidate information, it is time to make a final decision on whether or not to endorse specific candidates. If you've done a good job of setting up a clear process at the beginning, this will be a lot easier.

There are a number of ways your group can go about making its final decision, each with benefits and drawbacks. The most important thing is not the method, but the fact that the process is clear and fair from the beginning.

First, set in place a clear plan for how the votes will be counted. There are a variety of ways your group can vote. Here are a few ideas you can consider:

- **Two-thirds Majority (Recommended):** The endorsement goes to the candidate who receives greater than 66% of the vote. You may need to vote multiple times to reach this percentage. This is our recommended method.
- **Consensus:** All members of a group must be in agreement for an endorsement. This can be very difficult to achieve and is generally not recommended.
- **Plurality:** The endorsement goes to the candidate with the most votes regardless of the percentage. This can result in a low level of buy-in, so is generally not recommended.

We strongly recommend requiring a two-thirds majority to move forward with an endorsement. After all, your endorsements only matter if a lot of people in your group are excited about the candidates you're supporting. You could also require a mere plurality (going with the candidate with the most votes, regardless of what percentage of people voted for her), or a true consensus (where every member needs to agree to endorse). We've found that those options can either engender bad feelings or leave groups immobilized, unable to reach any decision at all. But you know your group best, and what will work best for you.

You should also consider what to do if there are more than two candidates competing for your endorsement. We would recommend holding two rounds of voting: an initial count, and a runoff election. The initial election has all eligible candidates, and the runoff is between the top two vote-getters. It's in this second election that we would advise requiring a $\frac{2}{3}$ majority to move forward with an endorsement.

Once you've determined a voting mechanism, figure out how and when you'll vote. This can be during a regular meeting, online over a specified period of time, or in a meeting called specifically for this purpose. If this is likely to be a contentious vote, making voting anonymous (online or some other manner) can be really helpful in keeping the peace.

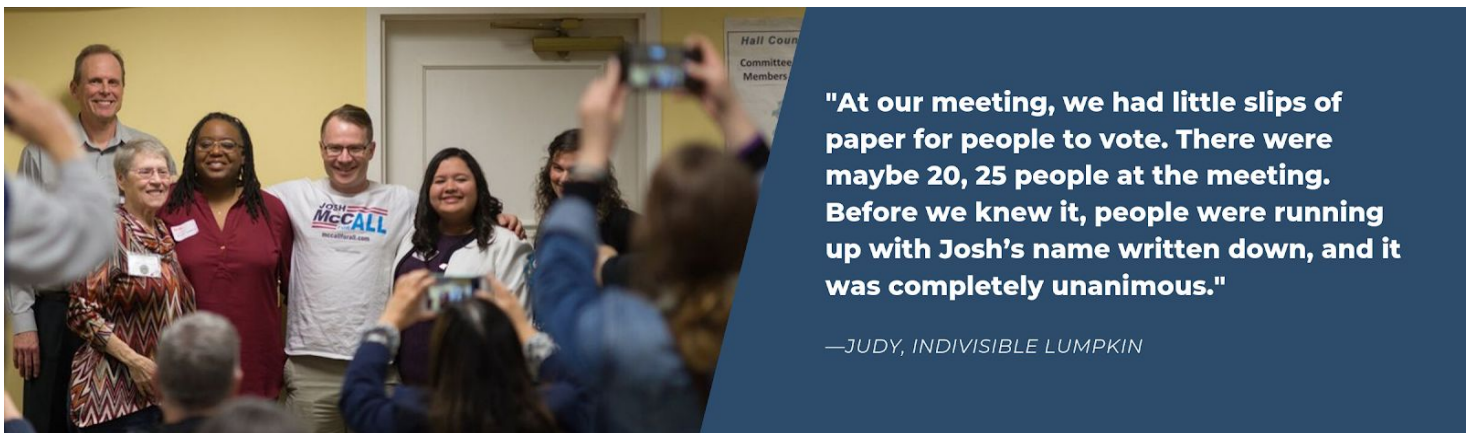
Finally, if you're taking a vote on a primary endorsement, we strongly recommend asking everyone to commit in good faith to support the eventual nominee. This is an

important time to remind people of what's ultimately at stake, and why it's important that no matter who wins the primary, we're united heading into the general.

Hold an In-Person Meeting

In-person meetings have the benefit of feeling more personal, and of allowing interaction among members of your group. If you choose to hold an in-person meeting, you may ask if any members want to speak up in favor of or against endorsing particular candidates. Do be sure to carefully facilitate this conversation, though, so that even if it's contentious, it doesn't overflow into ill-will.

On the other hand, in-person meetings may be more challenging for some members of your group to attend. Single parents and group members who work in the evening may struggle to make it to nighttime meetings. Depending on where your meetings are held, and whether you have a group member qualified to serve as an ASL interpreter, some group members may also face accessibility issues for in-person meetings. Consider providing childcare, and the option for members to vote by proxy (sending a friend) or absentee (voting in advance) if they are unable to make it to the meeting.



Set up an Online Vote

You can also choose to conduct the final endorsement decision online, using online software to come to group consensus. Both [Survey Monkey](#) and [Doodle](#) can be used to create online polls that group members can vote in. Once you've created a poll, you can email it to group members. Online polls should not be shared on public websites like Facebook, to ensure non-group members aren't influencing the vote.

In general, online votes will be more accessible to group members than in-person votes, because online surveys can be taken on each member's own time in their own home. Still, it is important to make sure your poll is clear and easy to understand. Some group members may be less familiar with online polling software than others, and may struggle to deal with new technology if there are too many options or if the options are unclear.

Online votes are necessarily less personal than face-to-face meetings. This can help prevent arguments between group members, but also reduces the opportunity for dialogue about pluses and minuses of different candidates. Members often raise points during in-person meetings that would go unheard during an online poll. As a best practice, we recommend that even if you're ultimately going to be voting using an online poll, you hold at least one meeting to discuss the candidates before doing so.

Announcing Your Endorsement

Prepare to make your announcement.

After your group has decided which candidate(s) to endorse, it's time to announce that decision. There are three parties you'll need to communicate your decision to: your group, the candidates, and the media.

Prepare a general statement about why you're endorsing the candidate. You'll use this language in multiple ways as you announce your news, so this is an important starting place! The statement should be short -- no more than three paragraphs -- and should be fully focused on the candidate and why you are excited to work on their behalf in the upcoming election. This is a great place to highlight particular policy stances your group supports and to demonstrate the importance of those policies in securing your endorsement. It can include one or two quotes from group members and should end with a line reemphasizing your group's excitement to work for the candidate.

Telling your group.

Regardless of how you conducted your vote, there will inevitably be some group members who were unable to participate. It's vital that all group members are informed about your endorsement decision before you go public. Having some group members read about the decision after the fact in the press would be particularly bad for morale.

Prepare an Internal Statement. Whoever controls your group's Facebook group, email list, or other way of communicating with your membership should be in charge of drafting an internal statement. The statement should reiterate the decision-making process, the results of the vote, and why you are excited to endorse the candidate(s) you've chosen. It is also a good idea to give a heads up as to what your group will be doing in support of the endorsement -- such as canvassing, phone banking, and voter registration efforts.

Telling the candidates.

You should inform both your endorsed candidate and any other candidates you considered. After all, they did take the time to fill out your questionnaire and go through your process.

Contact the Candidates. Send your general statement along with a quick note to any candidates who responded to your candidate questionnaire, thanking them for their time, and letting them know who your group decided to endorse. Make sure to let the candidate you've decided to endorse know first, and then send to all other candidates. You can also ask your endorsed candidate if they'd like to contribute a quote to your press release, or if they'd like to organize a joint announcement to the press.

Remember: *if you spend money on publicizing your endorsement to the general public, federal, state or local campaign finance laws may apply. It also may be prudent to check whether endorsement communications to the general public are required to have authority lines that state, among other things, who's making the communication and whether or not it was authorized by any candidate.*

Telling the media.

Now it's time to tell reporters about your decision. Your goal here is to insert your endorsement into the narrative of the race.

Prepare a Press Release. Whoever handles external communications should work on drafting a press release about your endorsement. If you have a dedicated spokesperson, that's great. If not, a group member who enjoys writing can take on the responsibility.

First, Consider Offering an Exclusive. Offering an "exclusive" means reaching out to a single reporter and asking if they'd like to hear who your group will be endorsing before anyone else, in exchange for agreeing to write a story about it. This tactic takes some extra steps, but it's the best way to get a story specifically about the endorsement, right at the time you want it. Often, a reporter may decide that "Organization Endorses Candidate" doesn't merit its own story, but instead will note this type of development and plan to mention it in an upcoming story. When a reporter knows their story will be unique and will be the first to deliver a "scoop," it sweetens the deal and makes the story more interesting for them and their editors. If reporters you contact with this tactic aren't interested, that's OK! Skip ahead.

- **If you have a good, friendly relationship with a local reporter:** Reach out to the reporter about a week in advance to offer an exclusive. If the reporter agrees to an exclusive story, be prepared to tell them what your endorsement means: how will your group use its people power to help your candidate? They need these details to fill in the column-inches that will make their story work. You can point to planned future events, or highlight how your group has mobilized around a past endorsement.
- **If not:** You can still use a similar tactic to up your chances of a story getting published. Find a reporter who's been covering the race. Read a couple of stories

to make sure you think their coverage has been fair. A day or so in advance, email them and offer to share an exclusive copy of your press release in advance. When you share it, write “EMBARGOED UNTIL” at the top, and list the time and date that you are OK with the story going public. The reporter may pass, or say yes.

Note: *A group member posting on social media about who you’re endorsing before the story breaks could mess up the story, and possibly your relationship with this reporter. You should be very clear with group members about this, or consider limiting the circle of group members you inform during this period. Think through this timeline carefully and balance these priorities in a way that feels right for your group.*

Then, Send Your Press Release Out Far and Wide. Send the statement out to local press, remembering to BCC all contacts. Make sure you’ve included anyone who covers local campaigns and elections. If you don’t know who that is, check the newspaper’s masthead, or search to see who has recently written stories about other races. Twitter is also a great tool for finding reporters’ contact information.

Finally, Post your Statement Online. Post your public statement on your website and social media accounts.

There Wasn’t a Story About Our Endorsement!

Even if reporters don’t cover your endorsement when it happens, they may talk about it down the line. When local Indivisible groups endorsed Lauren Underwood in IL-14, there was no headline in the local papers about it. But once Underwood won her election in November, [stories](#) about her victory [mentioned](#) local Indivisibles and their role in her win. It’s always recommended that you do media outreach and put out a press release, because it can lead to media coverage that grows your group’s capacity and our movement as a whole.

Now the Fun Starts!

Once you’ve made your endorsement announcements, election season swings into full gear. Stay tuned over the coming months to learn more about best practices for political campaigning, and how your group can have a real impact on electoral politics. Finally, always feel free to reach out to field@indivisible.org to let us know what resources would be most helpful to your groups. You are the leaders of this movement, and we’re excited to stand Indivisible with you as you take on electoral politics.

Sample Process

As explained above, every group should approach these decisions in a way that is best for your group and keeps with your values. To aid in your process, here is a sample (imagined) process from start to finish that you can tailor to your needs:

Context: Indivisible ABC is excited that there are several fantastic candidates running for mayor in their city! It's five months before the primary election -- things are starting to heat up and the group is thinking about getting more actively involved. There are a few really great progressive candidates in the race, and this election could make a big impact in their city.

Start the Conversation. *Indivisible ABC has some members that are really excited to get involved with the election, and some others who are nervous it will cause fractures within the group. Using this guide, their primary group leader Ana started talking with their members about the importance of endorsements, why they're powerful, and all of the good reasons to engage in a primary. At the same time, their outreach coordinator, Jessie, began to discuss the possibility of endorsing with the other four Indivisible groups in their city.*

Make a Decision to Consider an Endorsement. *After having several conversations as a full group and with other groups in the area, Ana gets together Indivisible ABC's steering committee of five people. They weigh the pros and cons of endorsing and decide that this election is too important for the future of their city for them to sit out-- they need to get involved. They feel confident that their group can have a productive conversation about the issues and will be prepared to come together in the general election, no matter the outcome. Now, they need to determine how they will run the process. The other four groups in the city also decide to endorse but choose to participate in Indivisible ABC's vote, instead of holding their own, because they're much smaller.*

Have a Leadership Meeting to Determine a Process. *A week later, Ana sets a time for a two-hour-long steering committee meeting to determine the process. At this point, there are four months until the primary election, so her group has a month to run the process, and then three months to actually get involved in the election. In advance of the meeting, Ana takes the time to write out a clear, timed agenda. She sends the agenda to her steering committee on the morning of the meeting.*

When the meeting starts, Ana walks through clear norms and the steering committee agrees that each decision requires three positive votes from the five members of the steering committee. The entire steering committee needs to agree to the final process and will leave any small disagreements behind once

they've made a decision. Together, the steering committee answers the following questions from the Endorsement Guide:

- *Who makes the decision on the process? The entire steering committee will set the process as outlined above.*
 - *Who can vote? Any group member who has attended an action or meeting in the last six weeks is eligible to vote on the endorsement. The steering committee will send out the list of eligible members a week in advance of the meeting.*
 - *How will you vote? The group will vote anonymously. They will all come together for a meeting and cast a secret ballot. Group members will be allowed to send a proxy or cast a ballot early by absentee.*
 - *What level of consensus do you need? The group will only move forward with a candidate that receives two-thirds majority. After the first vote, the two highest vote winners will go to a second round if none receives two-thirds in the first vote.*
 - *What happens to members who disagree? The group's planned election activities will be around the endorsed candidate. All members are encouraged to join but are welcome to canvass or phone bank for other candidates as individual volunteers. They will agree in advance that no group members will speak poorly of the group's endorsed candidate even if that was not their first choice and any members who chose to volunteer for other candidates will not represent the group when doing so.*
 - *How will you roll out the process to group members? The entire process will be outlined in an upcoming group meeting, posted on the private group Facebook group and sent out to the list. This will include all the information outlined above about the process.*

Announce the Endorsement Process. *Once the steering committee of Indivisible ABC finalizes their process, they announce it to their group at the next group meeting. They make it clear that this process is finalized, but accept all questions about the decision making and the process itself. Ana and the rest of the steering committee stay late after the meeting to answer additional questions and follow up individually with members who have concerns.*

Do the Research. *The candidate research committee researches the candidates' current positions, previous votes and sends out the candidate pledge. This research had been going on over the last few weeks but ramps up in the runup to*

the vote. The research is finalized two weeks before the group endorsement vote, which is about 3.5 months before the primary.

Send the Group Candidate Information. Two weeks before the endorsement vote meeting, the candidate research committee sends around information to all the members for review. This includes the candidate pledge, an outline of each candidate and a shorter document that summarizes the major differences between the candidates. This is sent out a few times on different platforms.

Hold the Endorsement Meeting. About three months before the primary, endorsement day arrives! After giving group members two weeks to review the candidate information, the voting meeting is held.

- *Accessibility: The meeting is held in an ADA accessible space and group members are able to vote either by proxy or in advance by absentee if they're unable to attend. All group members receive a list a week in advance of who is permitted to participate in voting. One group member who has never attended an event shows up -- a group member explains the process and voting requirements. The group member commits to come to the next event and leaves understanding the process.*
- *Conversation: Ana introduces the agenda for the evening and sets norms. She begins by clearly explaining the entire endorsement process and voting structure. The candidate research committee then presents each candidate in the race. There is a representative from the group who supports for each candidate who speaks for three minutes about what sets that individual apart, followed by five minutes of questions for each candidate. Since there are 100 people at the meeting, there is no group-wide discussion -- instead, there is a 20-minute breakout where folks can discuss with one another.*
- *Disagreements: During the breakout, there are a few small arguments that break out between proponents of different candidates. Luckily, the steering committee had pre-identified several moderators who float around to assure all conversation is productive. They approach any groups that are having a serious disagreement and bring the conversation back to the issues in a positive direction. The moderators also use this opportunity to remind folks that at the end of the night, everyone will agree to get behind one candidate as a group.*
- *Voting: Indivisible ABC casts secret paper ballots. After two rounds of voting, they are able to pick a candidate by an over two-thirds majority! The steering committee announces the results and reminds folks of the norms they had agreed to earlier in the evening. They also share their first actions to support that candidate.*

Make the Announcement. *Once the decision has been made, Indivisible ABC puts together a statement to notify all group members of the decision. After group members are notified, the press team crafts a public statement. They first send it to the candidate they endorse, followed by the candidates they didn't endorse (with a note thanking them for completing the candidate pledge) and then to a local press list. Indivisible ABC then kicks into high gear in support of their endorsed candidate by signing up to knock doors and phone bank.*

Chapter 6: Taking Your Endorsement



National

To amplify and further the impact of the endorsements of local groups, Indivisible will facilitate a grassroots-driven national endorsement program for federal (U.S. Senate and U.S. House) and gubernatorial candidates. Indivisible groups who have undertaken an endorsement process in their district or state can [submit a local endorsement for national consideration](#). Indivisible members in the relevant district or state will then be able to vote online on the endorsement.

Together, Indivisibles have a tremendous amount of power—and endorsing is an important first step to influencing who represents us. At a national level, we will only endorse candidates who have been:

1. **Endorsed** by a local Indivisible group
2. **Recommended** for a national endorsement by that group
3. **Cleared** candidate vetting
4. **Voted for** by the majority of Indivisibles who voted online in the relevant district or state

Who Will We Endorse?

Endorsements will be driven and voted on by local Indivisible groups who live in the state or district of the race. Indivisible groups that have gone through their local endorsement process for a federal or gubernatorial race will have the opportunity to request an endorsement facilitated by Indivisible at the national level. As a national organization, we also expect all candidates we put our name behind to live up to certain

values – especially on our core organizational priorities of **structural democracy reform** and **immigration**.

Why Do National Endorsements?

Endorsing as a movement helps us grow and work together to make a bigger impact. The party can try to make this choice for you—nominating people who look like traditional politicians, and come with money and connections. Grassroots endorsements disrupt gatekeeping, elevate new leaders, and change the power landscape.

National endorsements help further elevate candidates who are preferred by your grassroots groups. Uplifting locally endorsed candidates on the national stage will showcase a new class of leaders who have grassroots support and reflect the values of the Indivisible movement.

What Does a National Endorsement Mean? (Aka Why Should My Group Request One?)

A key goal of the national endorsement program is to provide local groups in every part of the country with the resources to impact elections. Every national-level endorsement will come with:

- A \$1,000 check made out to the campaign
- Candidate and bio added to our website's list of endorsed candidates
- Web and social media graphics, customized to candidate
- Indivisible Swag (rally signs, hats, buttons, etc.)
- A press release from the national team announcing all candidates endorsed in that round, along with your group's media contact for national press

In addition, we plan to make deeper investments in a small number of nationally endorsed primary and general election races. These races have yet to be determined and will depend on electoral dynamics as the cycle develops. These investments may include some (not all) of the following:

- Support with media activities related to local Indivisible group support of the candidate, including proactive pitching to local press
- Press announcement events organized to boost media coverage
- Research and analysis of electoral dynamics in the endorsed race

- Identification of potential volunteers to support your candidate and email event recruitment for events registered through indivisible.org
- Direct mail pieces sent to targeted voters
- Literature and materials to support door-to-door canvassing
- Paid digital advertising
- Group access to voter contact tools (canvassing, phonebanking, P2P texting)
- Support and strategic guidance from one of our Regional or Statewide Organizers

General Steps of the National Endorsement Process

1. Indivisible Group(s) Go Through a Local Endorsement Process

Ultimately, we believe that any endorsement should start with you, the local groups that make Indivisible strong. Once you've endorsed at the local level, then...

2. Group Submits a Request for National Endorsement

Group leaders who have already gone through the local endorsement process submit a request for a national endorsement.

3. Indivisible Team Reviews the Submitted Candidates

Our team will conduct a vetting process of all endorsement requests to review the candidate's history and ensure that they're consistent with the values of our movement; we anticipate that local groups will have gone through a similar process and we don't expect to disagree with those assessments. Candidates will submit answers to our policy questionnaire ([which you can view here](#)), which will be reviewed and shared with local groups. To pass the questionnaire, candidates must score 80% or better, and answer correctly on all baseline progressive issues. We'll also consider factors like: the number of Indivisible groups that have endorsed a candidate and whether there are any conflicting endorsements; the number of progressive partners that have endorsed a candidate; and intangible factors, such as whether a candidate is running for the first time or performed well in a past race. We actively seek to support women, people of color, and members of other marginalized communities for office where possible. Candidates who clear the vetting process and the questionnaire will move to the next round, which is online voting by local groups within the candidate's district or state.

4. Group Members Sign Up to Be Part of Voting

We will ask everyone on our email list in the district or state in which the election is taking place to vote via email. Group leaders can circulate this form to group members who want to vote on endorsements. (We don't sell anyone's information or share it with other organizations, but we want to make sure we're in touch with the people who lead our movement—the members of Indivisible groups—exactly for situations like this so

that we can make sure we're taking their preferences into account. We'll also use these emails to help drive attendance to events!). **Sign up to vote now.**

5. Voting Begins

Group members on our email list (make sure all your group members sign up **here!**) in the candidate's congressional district or state will receive an email with the candidate's bio/blurb and which groups have endorsed them.

Why aren't all the candidates included in the email to vote? *The only candidate(s) that will be included in the email will be those that have been locally endorsed by Indivisible groups, nominated for a national endorsement and have passed our policy questionnaire.*

6. The Votes Are Tallied

We consider two factors from the votes:

- First, we will only endorse a candidate if 60% or more of Indivisibles who vote online support them
- Second, we will look at the portion of total potential voters who decided to vote to ensure that there's enthusiasm for the candidate among Indivisibles.

7. Results Are Announced

Indivisibles in the district will receive an email announcing if an endorsement has been made. If voting results in a national endorsement, groups should make plans to announce the endorsement and get involved in supporting their chosen candidate.

8. Celebrate the Endorsement Locally

Any national endorsement is a team effort between the group or groups that nominated the candidate, our national team, and all local Indivisibles who voted to endorse. So celebrate it a little! Consider hosting an announcement event with the candidate. Think about the ways the race might be historic in nature or what about their story excites you—talk about that! (Reminder that we always tell groups to spend their time, not their money—otherwise it will need to be reported to the FEC).

Note on Hosting Events with Candidates. *In general, if you spend money on an event at which a candidate can advocate for their own election (or against someone else's), that spending will be treated as an in-kind contribution to that candidate, unless the event falls into a specific exception. We recommend that groups avoid spending any money to host candidate events unless they have received guidance from a campaign finance attorney about how to structure the event. One way to avoid campaign finance implications is to host a candidate*

event without incurring any expenses. For instance, a group may be able to avoid spending money on a candidate event if they invite a candidate to do a Q&A at the end of the group's regular meeting instead of hosting a separate event.

When Will This All Happen?

Endorsements will occur in rounds throughout the election cycle, with endorsed candidates announced at the end of each round. We plan to announce the first round of candidates around **mid-November**, with subsequent rounds announced **about every 6 weeks**.

As of the launch of this guide, [the first round of nominations is open!](#) While the exact timeline will vary from round to round, generally nominations will remain open for **around 3 weeks**.

We'll gather all nominated candidates and begin the vetting process. We'll send all candidates [our questionnaire](#), and give all campaigns a minimum of one week to respond. Candidates who pass the questionnaire will then be put to a vote of all Indivisibles on our email list in that state or district. In every round, online voting will be open for **3 days**. Candidates must receive over 60 percent of the vote from participating Indivisibles.

We'll follow up with groups whose candidates are being endorsed to let them know and share out candidate graphics, and then make the announcement later in the week.

Conclusion

“

When I dare to be powerful, to use my strength in the service of my vision, then it becomes less and less important whether I am afraid.

—Audre Lorde

”

If you're going to be using this guide and making endorsements, please feel free to reach out to our organizing team. If you're not sure who the organizer is for your area, email us at field@indivisible.org to get in touch. And please let us know when you make decisions so that we're able to amplify the important work you're doing.

As we roll out our National Endorsements program, we want to make sure we know who's already gotten involved in the 2020 elections and how. Fill out this [form](#) so that we can learn more from you.

Using your group's resources, enthusiasm, and energy on behalf of great progressive candidates who represent their constituents is a meaningful way to show up for your community and take a positive stand against the Trump agenda.

Getting involved in elections can be intimidating. But it's also a great opportunity to further define your group's values and goals, and to show up for inclusive progressive candidates in 2020 and beyond. Whether your group ultimately decides to endorse candidates this cycle or not, we hope considering the endorsement process will be useful as you plot out how to get involved in electoral politics.