Citizens for Informed Voters

Guidelines for
Researching Candidates

May 4, 2022

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Important Note: *If at any time and for any reasons any of the sources, approach and/or forms suggested below aren't right for you, please ignore and use your own sources, approach and/or forms. It is much more important that you prepare information on candidates for yourself and/or your friends and family that you are comfortable with than it is that you use any of the following.*

1. **Timing Overview**
    a. Begin candidate research eight weeks prior to each election
        i. Primary elections: dates vary significantly by state (from March to November)
            1. See the following website for each states' primary election date - www.ncsl.org/research/elections-and-campaigns/2022-state-primary-election-dates-and-filing-deadlines.aspx
        ii. General elections: begin early September for early November elections
    b. Issue your Candidate Reviews to your Friends & Family two weeks prior to elections to allow time for early voting and for review, questions and/or suggestions

2. **Identify Offices and Candidates**
    a. Identify the Offices and Candidates that will be on your Voting District ballot by using the following sources:
        i. Your county election office website
        ii. Political party websites (local, county, state or national political party websites)
        iii. Public service websites (see Appendix I for information on each):
            1. Vote USA: www.vote-usa.org
            2. BallotReady: www.ballotready.org
            3. Vote411 Voters Guide: www.vote411.org
            4. BallotPedia: www.ballotpedia.org/Sample_Ballot_Lookup
            5. VoteSmart: https://justfacts.votesmart.org/

3. **Set up Candidate Review Forms**
    a. Following is a link for Sample Candidate Review Forms and Examples of Completed Forms - www.citizensforinformedvoters.org/candidate-review-forms-and-examples
    b. Feel free to use any form or format that you are comfortable with or that you believe will be best for your Friends & Family. It is more important to provide information and perspectives on Candidates than that it be in a particular format.
    c. Research the roles and responsibilities of each office up for election if not previously done and post to the Candidate Review forms

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4. **Research Candidates**
    a. Use the following websites and sources to research Candidates:
        i. Political party websites (local, county, state or national political party websites)
        ii. Public service websites (see Appendix I for information on each):
            1. Vote USA: www.vote-usa.org
            2. BallotReady: www.ballotready.org
            3. Vote411 Voters Guide: www.vote411.org
            4. BallotPedia: www.ballotpedia.org/Sample_Ballot_Lookup
            5. VoteSmart: https://justfacts.votesmart.org/
    b. In addition to the above websites and sources, use the following:
        i. Candidate Campaign Websites: See each candidate's campaign website
        ii. Candidate Facebook page: Link generally available on candidate's campaign website, if not, search Facebook by name
        iii. Candidate LinkedIn page: Link generally available on candidate's campaign website, if not, search LinkedIn by name
        iv. Other sources of information (news, friends, candidate contacts, etc.)
    c. Candidate Review Forms should be prepared with sufficient detail to be meaningful but summarized enough that friends and family won't need a lot of time to review
    d. **State and National Elections (even numbered years):** There will generally be more information available for state and national election candidates, but it will be more professionally developed (negative ads, etc.) requiring further research to determine the accuracy of the information
    e. **Local, County and Judicial Elections (odd numbered years):** There will generally be less information available for local, county and judicial election candidates, which will require further research, as follows:
        i. Start with the secretary of state's office or the state's board of elections. Work your way down from there, starting with your county government website, then the city website, and finally the board, district, or court website depending on the type of office you're researching
        ii. Consider web searching for "(your county) election board", "(your city) candidates" or "elections (current year)", "filed candidates", "current elections", etc.
        iii. Use county and/or city website menus, website maps or government sections to search for information on elections. Local election authorities include city clerk, clerk of courts, recorders, and election boards
        iv. Check your local and state news sources. A reporter may have posted candidate lists following a ballot access filing deadline
        v. Information isn't always available online; sometimes you will need to send an email, make a phone call, or even visit a government office to find this information
        vi. Use state and county Bar Associations for judges and justices:

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1. Search by state and county
2. Following is an example for the PA Bar Association reviews - www.pabar.org/site/News-and-Publications/News/News-Releases/2021/Feb/PBA-JEC-Ratings-of-Appellate-Court-Candidates

5. **Develop Candidate Ratings**
   a. Develop Ratings on Candidates, post those Ratings and reasons for them to the Candidate Review forms
   b. See Appendix II for Candidate Rating Criteria suggestions
   c. Feel free to use your own criteria but be sure to communicate what criteria you use to your friends and family group

6. **Distribute Candidate Review Forms**
   a. Distribute the Candidate Review Forms to your Friends & Family group two weeks before election day via email (or however is best for you)
   b. Consider scheduling a Zoom call or a get together a few days prior to election day with your Friends & Family group to discuss the Candidate Review Forms and to allow for questions
   c. Consider setting up a public Facebook Group page to post your Candidate Reviews
      i. You could then provide the link to this Group page with all Candidate Reviews to post your personal Facebook page, your neighborhood Facebook Group page, etc. Your Friends & Family group members could forward the link to their friends and family, etc.
      ii. You could name the page – "Your Name Candidate Reviews"

7. **Encourage Friends & Family to Vote**
   a. On election day encourage via email, Facebook, etc. Friends & Family members to vote

8. **Between elections**
   a. Follow elected leaders (i.e. attend town hall meetings, subscribe to newsletters, emails and other communications, request information, reach out to people who know or follow them, etc.)
   b. Identify others that may be interested in participating in the Citizens for Informed Voters Initiative and/or become members of your friends and family group to receive your Candidate Reviews for the next election

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Appendix I
Candidate Information Research Websites

1. Vote USA: www.vote-usa.org
   a. Website is easy to navigate
   b. Not as much biographical information as some of the other research sites
   c. Requests positions on issues, but only has for higher level offices

2. BallotReady: www.ballotready.org
   a. Good ballot lookup took; candidates are shown side by side on the first page, but information on individuals is on separate pages
   b. No information on candidates' positions on issues
   c. Individuals can provide additional information on candidates, including local, but only if the candidate is identified; a source URL and email address for the provider are required

3. Vote411 Voters Guide: www.vote411.org
   a. League of Women Voters information website
   b. Has a good ballot lookup tool
   c. Provides comparative formats
   d. Provides descriptions of the offices up for election
   e. Provides links to official websites, campaign website, Facebook, and other social media
   f. Has biographical info, including education and qualifications based on prior experience
   g. No information on candidates' positions on issues
   h. Provides questions for candidates and the candidates answers, without validation

4. BallotPedia: www.ballotpedia.org
   a. Ballot lookup tool with address lookup is easy to use
   b. Not in a comparative format
   c. They have a candidate questionnaire on issues, but only a few candidates respond
   d. Has biographical information, including education and qualifications based on experience
   e. Provides links to official websites, campaign website, Facebook, and other social media
   f. Provides history of prior elections for the candidate

5. VoteSmart: https://justfacts.votesmart.org/
   a. The lookup tool is not as user friendly as other websites
   b. There is good information on votes on bills, positions on issues, ratings by special interest groups, endorsements, speeches, and funding sources
   c. State level row offices and Supreme Court only, no lower state courts

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Appendix II
Candidate Ratings Criteria

<u>Overall Rating</u>

- The Overall Rating for a Candidate is an average of the below rating categories

<u>Integrity, Honesty, and Transparency Rating</u>

- Rating of the Candidate's integrity, honesty and transparency in general and based on:

  - Positive ads, based on record, not attacking opponent or opponent party
  - Actions consistent with messaging
  - Serves all interests fairly

<u>Skills and Experience Rating</u>

- Rating of the Candidate skills and experience for the role and responsibilities, based on:

  - Government experience
  - Business experience
  - Education

<u>Balanced Solutions Rating</u>

- Rating on whether the Candidate will evaluate all liberal and conservative perspectives and reach balanced solutions in the public interest, which take into consideration:

  - Short-term and long-term impact
  - Local and national interests
  - Individual and public interest