

NASW—PACE TIPSHEET



NASW · PACE

National Association of Social Workers
Political Action for Candidate Election

PACE TIP SHEETS

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PACE TERMS AND DEFINITIONS

Contribution—When PACE gives money to a candidate running for office.

Candidate—A person running for election.

Endorsement—A stamp of approval for someone running for office, which means that PACE wants him or her to win the election.

Challenger—A person running for election against an incumbent.

Incumbent—A person who is already elected to the office for which they are seeking re-election.

Fundraiser—An event to raise money for a candidate; takes place at various times of the year; counts as a contribution.

Hard money—A slang term that refers to campaign and PAC funds that are subject to limitations and reporting requirement by the Federal Election Commission. PACE money is hard money, and is unaffected by the new campaign finance law. Indirectly, it will put more pressure on PACE for its funds.

Open Seat—A situation when the incumbent is not running for re-election, or the district was newly created during redistricting and reapportionment.

PACE Trustees—The national PACE Board of Trustees consists of seven NASW members who make decisions about endorsements and contributions of federal candidates.

Partisan—Relating to a particular political party.

Bi-partisan—Relating to the two major political parties.

Non-partisan—Not relating to any political parties.

Multi-partisan—Relating to more than one political party.

Political—Relating to government, making or influencing governmental policy, party politics, or the art or science concerned with winning and holding control over a government.

Reapportionment and redistricting —An activity that occurs every ten years after the US Census, during which congressional districts are allocated to states and congressional district lines are redrawn to reflect shifts in population.

WORKING WITH STUDENTS

NASW can play an important role in social work education programs by sharing political information and encouraging students to register and vote. Working with students also helps you tap into a pool of potential members and volunteers.

PACE Interns

Specifically, students can help your mobilization efforts. MSW students looking for a field placement can learn about macro social work while helping your chapter be more politically effective. A BSW or MSW intern can help your chapter at any time of year.

Benefits of a PACE Intern

- Mobilizing members helps elect candidates who support NASW issues.
- Personal contact, involvement opportunities, and visibility help retain members.
- You don't have to do it all by yourself.
- Students gain valuable skills, including community organizing, public speaking, writing for advocacy purposes, learning the legislative and electoral process, and how social work and advocacy intersect.

Sample Intern Duties

- Research positions of candidates (through internet research, voting records, bill sponsorship, and interviews) to develop candidate comparisons
- Write newsletter articles on candidate endorsements
- Mobilize members for targeted campaigns and urge them to vote
- Build an activist database and e-mail network
- Volunteer for campaigns and phone banks on behalf of NASW
- Organize students and speak to social work policy classes about NASW legislation, registering to vote, joining NASW, and volunteering on campaigns
- If an intern stays past election season, he or she could also work on legislative issues such as tracking legislation, monitoring votes for state legislators, writing e-mail alerts on hot bills, and helping prepare for lobby day. However, PACE may not pay an intern while he or she is undertaking legislative or lobbying activities.

PARLIAMENTARY PROCEDURE TO RUN MEETINGS

Using parliamentary procedure will provide your meetings with structure, and will assure members of the committee that decisions are made with a clear process that includes opportunity for discussion and procedures for making decisions.

How the Motion is Brought Before the Group

1. A member makes the motion: “I move that (or ‘to’)...”
2. Another member seconds the motion: “I second the motion,” or “I second it,” or even “Second.”
3. The chair states the motion: “It is moved and seconded that... Are you ready for the question?”

Consideration of the Motion

1. Members can debate the motion:
 - A. Before speaking in debate, members obtain the floor.
 - B. The maker of the motion has first right to the floor if claimed properly.
 - C. All remarks must be addressed to the chair.
 - D. Debate must be confined to the merits of the motion.
 - E. Debate can only be closed by order of the assembly (2/3 vote), or by the chair if no one seeks the floor for further debate.
2. The chair puts the motion to a vote:
 - A. The chair asks: “Are you ready for the question?” If no one claims the floor, the chair proceeds to take the vote.
 - B. The chair says: “The question is on the adoption of the motion that... As many as are in favor, say “Aye.” (Pause for response.) Those opposed, say “No.” (Pause for response.)
3. The chair announces the result of the vote.
 - A. “The ‘ayes’ have it, the motion is adopted, and ... (indicating the effect of the vote),” OR
 - B. “The ‘no’s’ have it, and the motion is lost.”

Abridged from the National Association of Parliamentarians and
Robert’s Rules of Order Newly Revised (9th ed., 1990).

ASSESSING CANDIDATES

Assessing candidates is a key role of PACE, and the process can be carried out in several ways. Current officeholders can be assessed through their voting records, bills they previously sponsored, and previous relationships with the chapter. Some chapters use written questionnaires, though national staff does not recommend them because points of clarification and follow-up questions are not possible.

National staff recommends that you interview challenger candidates by telephone or in person. You will obtain a more authentic version of the candidate's positions, and have more opportunity to educate the candidate on social work issues in a face-to-face meeting.

Before the Interview

- Invite the candidate to your office or agree on a location convenient to both of you.
- Prepare written materials on NASW for the candidate.

During the Interview

- Tell the candidate about NASW and your endorsement timeline.
- Never promise to endorse a candidate until your chapter PACE committee has made an official decision.
- Obtain the following information:
 - Date of the candidate interview
 - Candidate name, political party, and office candidate is seeking
 - Campaign address
 - Candidate's occupation and education
 - Candidate's political experience
 - Date of the primary and general elections
 - Names of all other candidates in the primary and general elections
 - Outlook for the outcome of the election
 - Assessment of the candidate's campaign, such as amount of money raised and the names of supporting organizations or constituencies
 - Candidate's relationship with the chapter and the social work community
 - Candidate's positions on NASW issues (or NASW voting record on issues such as health care, licensure, mental health parity, civil rights, reproductive choice, welfare reform, social service funding, and other issues important to your chapter)

After the Interview

Consult with the committee and follow your chapter's written endorsement guidelines and criteria to make a decision on which candidates to support.

FUNDRAISING

Fundraising for PACE

When fundraising for your chapter PACE committee, make sure that you raise money from only NASW members. You can do this through phone calls, events, or at conferences.

At Conferences With Non-members

You cannot raise money that will go into the PACE fund if the event will be attended by both NASW members and non-members. However, you can raise money for “political education,” with an agreement that the chapter will note these funds in a separate line item in the general NASW treasury. Money raised from non-members for political purposes must stay in the general NASW treasury, and cannot be transferred to PACE or used for candidate contributions. However, your chapter may use it to pay for other political expenses that would help PACE, such as meeting costs, mailings, and so on.

Fundraising for a Candidate

One way to build relationships with candidates who support NASW legislative priorities is to raise money directly for that candidate. If you plan a fundraiser for a state or local candidate, consult your state campaign laws. For federal candidates, there are several basic guidelines:

- Raise funds for a candidate only if PACE has endorsed him or her.
- Consult the candidate’s campaign staff regarding how checks should be made out. An individual can contribute up to \$2,000 per election to a candidate, which means \$2,000 in the primary and \$2,000 in the general election.
- Get all contributions by check. Any contributor giving \$200 or more must list his or her occupation and employer.

Fundraising From Your Members

You can call, mail your members directly, or hold an event on behalf of a candidate. Either NASW or PACE can pay those costs. Work with the campaign to design an appropriate message and negotiate the timing.

Fundraising From Members and Non-members

Because individuals make out their checks directly to the candidate’s campaign, you can fundraise from anyone in this case. For example, hold an event and invite NASW members, their family, friends, and co-workers. Consider asking allied groups, like psychologists, nurses, or teachers, to cosponsor the event and invite their members. For state and local candidates, you can negotiate who will pay for events based on your state election law.

House Parties for Federal Candidates

Chapters and chapter PACE units are prohibited from contributing to federal candidates. Therefore, house parties are recommended for federal candidates. An individual who sponsors the event may spend up to \$1,000 on food, beverages, and invitations before counting it as a campaign contribution. Amounts above \$1,000 must be reported to the candidate and the national PACE office as an in-kind contribution. If the event takes place at the chapter office, all food, beverage, and invitation costs must be paid for by individuals or the candidate’s campaign, and cannot be reimbursed by the chapter or its PACE.

- 1. Contact national PACE staff before the event.** Discuss previous contributions and make sure national PACE has endorsed the candidate. National PACE pays only direct candidate contributions, and does not pay for the costs of food, beverages, or invitations at a fundraiser.

- 2. Set a fundraising goal and budget.** If your goal is to raise \$500, you could ask 25 people to give \$20, and so on. Set the event price according to the predicted contribution level of the prospects you intend to target. Be creative—tie the number to a birthday, years in office, or other interesting milestone.
- 3. Negotiate with the campaign** eight weeks before the event to determine:
 - Type of event (coffee and desert reception, barbecue, wine tasting, cocktail party, luncheon, or ice cream social)
 - Date and time
 - Logistics, such as chairs, tables, risers, electrical equipment
 - Invitation list, including special guests, such as elected officials
 - Chapter and campaign staff responsibilities before, during, and after the event, and, specifically, who will attend the event to gather the checks
 - Location
 - Consider costs, accessibility for people with disabilities, parking, public transportation, and how widely known the site is
 - Are there philosophical barriers to the site? (Use union restaurants and hotels)
 - Consider size of room (large enough to look respectable but not large enough to dwarf a crowd or leave empty seats)
- 4. Print and mail invitations** four to six weeks before the event. Send invitations to three or four times the number of people your location can handle. Include the name of someone known to your guests on the invitation, as they will be more likely to respond. Include the minimum donation you are asking on the invitation, and finalize the invitation through the campaign office.
- 5. Finalize logistics** one to two weeks before the event.
 - Make follow-up calls to everyone on your guest list and remind them to attend.
 - Complete nametags and sign-in sheets.
 - Prepare literature, buttons, and bumper stickers for the sign-in table.
 - Provide the campaign with materials about NASW and PACE so they know the audience to whom they are speaking.
 - Make signs, pictures, placards, and balloons.
 - Tabulate money pledged and received.
- 6. Have fun at the event.** Introduce the candidate to those in attendance. The candidate will usually make a short speech to thank guests and talk about his/her concerns. Encourage guests to participate in other campaign activities, and take a lot of photographs.
- 7. Follow up.** Work with campaign staff to tally the checks so you know how much you helped raise. Send copies of photographs to the candidate's headquarters for use in mailings. Send thank-you notes to the guests.

Basic Fundraising Principles

Whether phoning, sending a mailing, or planning an event, follow these guidelines.

- Establish a rapport with your prospects by making the connection with NASW.
- Describe PACE and illustrate what you have accomplished so far. You can also include information about candidates, elections, and the issues important to social workers.
- Deliver a customized fundraising message that shows prospects how they will benefit personally from contributing. Indicate what you need and raise the stakes by making the prospect feel that much depends on his or her contribution. Appeal to basic human motivations like pride, idealism, altruism, obligation, compassion, and so on.
- Tell prospects how their donations will be used.
- Once a member has contributed, you have only just begun the process of courting and cultivating him or her. Immediately send a written thank-you note. Depending on the level of the contribution, you may also want to call and thank the member. After the thank-you note or call has been received, cultivate the member so you can ask him or her to donate again.

Notes of Caution

- Successful events take staff and volunteer time to plan and execute. Allocate sufficient resources to implement and manage an event so that it will succeed.
- The purpose of a fundraising event is to raise funds. Too often, the PACE committee feels as much an obligation to have a party for friends and workers as to raise money. A good event can contribute to the morale of the volunteers, but that is not the main purpose. Do not charge too little for an event that is intended to raise money—they require too much work to barely make a profit.

MOBILIZING MEMBERS FOR ELECTION ACTIVITIES

Social workers, if we vote, can have a major influence on election results and, therefore, legislation, government, and policy. Chapter PACE committees must go beyond endorsements and mobilize members to volunteer and vote for endorsed candidates.

Mobilization Activities

Members can build political power for social workers in a number of ways during campaign season, such as:

- Volunteering for a candidate
- Calling other members to urge them to vote
- Helping mail a campaign flier to members
- Holding house parties to support a particular candidate and share information
- Writing letters to the editor

Who to Mobilize

To use your time wisely when recruiting help, focus on groups of people who are most likely to volunteer, such as:

- Chapter leaders, including the PACE committee and chapter board
- Politically active members—members who have contributed to PACE or attended lobby day
- Previous volunteers and their friends, family, and co-workers
- Retirees
- Students in social work policy classes who want extra credit
- New members who want to get to know their professional organization

How to Mobilize

Communicate with Members

First, you must inspire and motivate members, which is based on building relationships. Social workers are trained communicators; use your communication skills to convince members that PACE activities hold many benefits.

Building relationships requires that members hear from NASW personally, which can be an intensive effort. In order to make these personal connections you must first provide members with basic information.

When NASW members have information, their understanding of PACE and their desire to be involved will increase. Information can be shared over the phone, in newsletters, mailings, or chapter meetings. Many types of information can be shared, including

- Key election dates, such as primaries and deadlines for voter registration
- How to register to vote
- Who was endorsed, and why
- Specific ways members can get involved in PACE-endorsed campaigns
- Background on ballot initiatives
- Reminders of upcoming events such as rallies, fundraisers, and political trainings

Ask for Help

- Ask chapter leaders, “Will you help me? I need 30 minutes of your time.”
- Ask members through the chapter newsletter or e-mail network. Communicate early and often, starting with winter/spring newsletters and continuing through election day.
- Hold a phone bank. Have a schedule of tasks, dates, and times of volunteer opportunities available. A friendly phone call reminder the night before helps increase turnout.
- Have a party to kick off recruitment, raise funds, and launch your effort. Make a volunteer sign-up sheet available to all guests.
- Ask members to volunteer up to four hours between September and Election Day on a PACE-endorsed campaign, or to make a financial donation.
- Ask current volunteers to make the pitch—it can have a greater impact.
- Have fun—enthusiasm is contagious. Let potential volunteers know that you are excited!

Working with Volunteers

Why Do People Volunteer?

People volunteer for several reasons. Appeal to potential volunteers for their help based on their own motivations, which might include:

- There are networking opportunities.
- They care about the issues or organization’s goals.
- They want to meet people.
- They have fun using their skills or learning new ones.
- They have a leadership role in the organization.
- They want recognition.
- They experience peer pressure.
- They admire a professional leader.

Basic Principles

- Plan ahead so volunteers do not feel their time is being wasted.
- Break activities into small pieces so everyone can participate in some way.
- Have a menu of tasks for volunteers to choose from.
- Ask each volunteer to do ONE thing. Do not overload your volunteers with responsibility. Ask them to complete one activity, then another. If volunteers feel their time is being used well, they may sign on for a longer commitment.
- Ask 40 members, if you need 10 volunteers for an activity. Some will say no, and others will not show up.
- Keep track of your volunteers by creating a database.
- Provide volunteers with the necessary tools, including an orientation and written instructions. Give them a clear definition of responsibilities, tasks, and activities.
- Offer free food and spread tedious work among all the volunteers.
- Thank your volunteers, both as soon as they sign up *and* after they help.

Phone Banks

Reasons to Use a Phone Bank

- Delivering a brief message with a low key, but affirmative “pitch” for the candidate
- Identifying voter preferences to find out how your members feel about a candidate or issue: For example, ask your members whether they are likely to vote for Smith or Jones, on a scale of 1 to 5, with 1 being very likely. Then call back those who indicated a preference for Smith and remind them to vote. This ensures that you are getting out members who support PACE-endorsed candidates.
- Recruiting additional volunteers: Ask members to be active volunteers by working on a campaign. Ask those who do not wish to work on a campaign to engage in other activities like displaying a candidate’s lawn sign.
- Getting out the vote by informing the candidate’s supporters when and where to vote, and reminding them to do so
- Gauging your members’ interest and level of knowledge on the elections, which will help guide future planning

Phone Bank Tips

Phone banks are better than asking individuals to phone from home, because working as a group is more encouraging and enjoyable. When everyone is in one place, people can be directly supervised, progress can be assessed on the spot, and changes can be made if problems arise.

- Pick a location with several phone lines, such as the chapter office.
- Recruit phoners. One person can make at least 30 calls per hour. Calculate the hours and the number of volunteers you will need.
- Write and test a very short script that will resonate with your members. Make sure volunteers identify themselves as NASW members.
- A percentage of the phone numbers will be wrong. Do not get discouraged.
- If callers find out new information about a member, such as a new phone number or address, submit that information to be changed in the database.
- Ask the callers to tally their results.

Outreach through Mailings

- A personal letter, postcard, brochure, newsletter article, leaflet, or enclosure can carry a message about supporting PACE-endorsed candidates or becoming a volunteer.
- E-mail is another quick way to share information.
- Use attention-getting words and active verbs, and make it easy to read.
- Campaign mailings should be concentrated in the six weeks before election day. Get-out-the-vote mailings should arrive as close to the election as possible.
- Always include information on who to contact to become more involved or to make a contribution.



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