

SBWPC Protocol for Endorsement – Current as of 11/3/2013

1. The SBWPC may endorse as many candidates as will appear on the ballot and can be voted on in that electoral race as determined by the County Elections Office. However, SBWPC may not endorse any more candidates than there are seats to be filled as determined by the Elections Office and may choose to endorse fewer or none. No candidates will be endorsed in uncontested races. The SBWPC may also choose to oppose a candidate.
2. Annually, Elections & Appointments (E&A) Sub-Committee will:
 - a. Create a preliminary list of races that will be considered for Endorsement and present to the SBWPC Board for Review and Approval by each March and October.
 - i. The list may change as circumstances warrant.
 - b. Determine a timeline for endorsement in specific races.
 - i. Timeline may vary based on the level of interest in the race (i.e. Assembly/State Senate may have earlier deadline than School Board).
 - ii. SBWPC may endorse candidates prior to the close of filing where sufficient information on candidates exists.
 - c. Promote a timeline on the website and newsletter and in the media.
 - d. Establish Candidate Assessment Teams (CAT) for each office or ballot measure to be considered.
3. Elections & Appointments shall establish a list of questions that will be asked of all candidates running for any office for which SBWPC may consider an endorsement. These questions may be included in the initial questionnaire or included in the in-person interview.
4. To be considered for Endorsement:

Candidates for State or Local office must have taken some specific public action demonstrating their intention to run for a specific office, such as publicly announcing their campaign, filing a Form 501 with the local filing officer of the jurisdiction (i.e. City Clerk, County Clerk), or publicly beginning their fundraising efforts.

Candidates for Federal Office (U.S. House, Senate) must have filed a Statement of Candidacy (Form 2).

Statewide & Local Elected officials who have been endorsed in the past and have publicly announced their re-election efforts for the same office may request consideration of re-endorsement at any time within (15) months of the election date. A CAT may be formed at any point after that to consider re-endorsement.

The Board of Directors may vote to Re-Endorse any candidate at any Board Meeting.

5. Political Races that may be considered for endorsement shall be divided into the following categories:
 - a. Category A may include School Board and Special Districts within Southern Santa Barbara County and other races as identified.
 - b. Category B may include Congress, State Senate, Assembly and County Supervisor. It may include Mayor and City Council Members, and candidates for county wide office (District Attorney, Sheriff, etc.).
 - c. Local Ballot Measures: limited to ballot measures to be voted on by voters in any of the jurisdictions located within Southern Santa Barbara County.
 - d. Statewide Measures.
 - e. Statewide Candidates.
6. Candidate Assessment Team (CAT) Process for Category A races:
 - a. Candidate Assessment Team (CAT) of 3 or 5 people will be formed to assist in determining SBWPC's Endorsement in electoral races.
 - i. All CAT members serving will be impartial in their views of each candidate and will make decisions about the electoral race in the best interest of the SBWPC and its mission.
 - ii. Ideally, the CAT members live in the geographic location pertinent to the electoral race.

- iii. All CAT members must be members of the SBWPC. Ideally, each CAT will have at least one current Board Member.
 - iv. All CAT members will comply with the current SBWPC Conflict of Interest policies, and shall not have endorsed a candidate, volunteered for, or given money to the campaign, nor served as a paid staff member or consultant to the campaign.
- b. The leader of the CAT must be experienced in having previously participated in one or more CATs.
 - c. The leader of the CAT consults with the Co-chairs of E&A, reviews questions that have been asked in prior years for this office, gathers additional interview questions specific to the electoral race under consideration and revises them as necessary. The CAT leader shall invite all SBWPC Board Members and E&A members to submit questions, even if the member is barred from serving on the CAT by the conflict of interest policy; the CAT Leader will review the questions provided, and modify them as they feel appropriate to address the general topic of the question. The CAT is not required to ask all questions submitted.
 - d. The leader of the CAT submits the list of interview questions to the E&A Co-chairs. The E&A Co-chairs determine if the questions are appropriate for the electoral race.
 - e. The leader of the CAT will ensure that all candidates are asked the same questions and in the same format.
 - f. The leader of the CAT will contact all candidates who have indicated their intention to run for a specific office through public action of the type specified in Section 4 of this protocol. The CAT leader will inform the candidate about the SBWPC, its website, position papers, the endorsement process, and offer the initial questionnaire. The CAT will make every effort to provide the initial questionnaire at least 5 days prior to the deadline for submittal. Contact may be made by telephone, email or mail using the contact information provided on a Form 501 or other alternative methods. The CAT leader shall document at least 3 attempts to contact a non-responsive candidate.
 - g. The leader of the CAT, or her designee, schedules the interviews with the candidates who are seeking the SBWPC Endorsement, and have returned the preliminary questionnaire prior to the established deadline
 - h. The CAT conducts in-person interviews with all the candidates that are seeking the SBWPC's Endorsement as indicated by return of the initial questionnaire.
 - i. All candidates for the same office should be interviewed within two weeks of each other.
 - ii. If it is clear from the responses to the initial questionnaire that the candidate does not share the values of the SBWPC, the leader of the CAT may seek an exemption from interviewing the candidate in consultation with E&A Co-chairs. Candidates eliminated from the endorsement process will be informed by the CAT leader.
 - iii. Candidates should attend the interview alone/without accompaniment by staff, friends, family, etc.
 - i. The CAT discusses the candidates' responses to the in-person interview questions and initial questionnaire. The CAT compiles a written report on the outcome of the interviews, a recommendation for or against Endorsement, and a recommendation for campaign funding if a candidate is endorsed.
 - i. The verbal and written reports should summarize the responses from each candidate that was interviewed.
 - ii. The verbal and written reports should summarize the salient issues of why a candidate was or was not recommended for Endorsement.
 - iii. The leader of the CAT or her designee presents a verbal and written report to E&A.
7. Candidate Assessment Team (CAT) Process for Category B races:
- a. The Candidate Assessment Team process for Category B shall mirror that outlined for local races with the following exceptions:
 - i. At least one member of the CAT must be a current SBWPC Board Member.
 - ii. Under extenuating circumstances the interview may be completed by video conference or similar technology that allows all members of the CAT to participate.

8. Local or State Ballot Measures:

Local Ballot Proponents or Opponents or Board or E&A members may request endorsements. If an endorsement for or against a local ballot measure is requested; a CAT consisting of at least one E&A Member shall research the pros and cons of the measure as it relates to the goals and objectives/policy papers of the SBWPC, and make a recommendation to E&A for consideration and possible presentation to the SBWPC Board.

9. Candidates for Statewide Office

If the Board or E&A considers a candidate for election or re-election to a statewide office of significant interest, a CAT consisting of at least one E&A Member shall research the policy and position of the candidate and any opponent in relation to the goals and objectives/policy papers of the SBWPC and make a recommendation to E&A for consideration and possible presentation to the Board. A candidate or elected official's prior support of SBWPC may be taken into consideration in such matters.

10. E&A develops a recommendation for or against Endorsement in the electoral race and any campaign funding and/or asks the CAT to seek follow up information as directed by E&A. Once E&A makes a recommendation on endorsement to be presented to the SBWPC Board, the Co-chairs will coordinate with the leader of the CAT on the presentation to be made to the SBWPC Board. If the recommendation from E&A is different from the recommendation from the CAT, that information must be presented.

11. One of the Co-chairs of E&A, the leader of the CAT or other designee presents a verbal and written report to the SBWPC Board.

12. The SBWPC Board holds a Noticed Endorsement Meeting for members.

- a. The CAT leader invites each interviewed candidate to attend the Noticed Endorsement Meeting.
- b. The Board votes on whether or not to endorse candidate(s) for an electoral race. It determines if any follow up is needed with the candidate chosen for endorsement.
- c. In order to be endorsed, a candidate must receive at least two-thirds (2/3) of the votes from eligible Board members in attendance at the Noticed Endorsement Meeting.
- d. Eligible members of the Board vote on any funding considerations for the endorsed candidate's electoral race.
- e. In order to vote, a Board member must attend the Noticed Endorsement meeting.

13. The leader of the CAT or one of the co-chairs of E&A communicates with all candidates about the outcome of the Membership Endorsement meeting within 24 hours of the vote of the Board of the SBWPC.