



Using Questionnaires and Forums to Engage Candidates

The logistics of sending a candidate questionnaire or hosting a candidate forum are important, but the strategy behind it is just as crucial. When should you engage candidates? Why are you engaging candidates this way? What are you hoping to accomplish? How will this help your NAMI achieve your goals? While there are strict rules to follow when engaging with candidates as a 501(c)(3) nonprofit organization*, this resource will help explore how to best engage with candidates and campaigns to further NAMI goals and priorities.

Candidate Questionnaires

NAMI cannot endorse candidates. We can, however, educate voters about where candidates stand on issues related to mental health. To do so, it can be helpful to prepare, distribute and share widely a questionnaire that explores where candidates in a particular race stand on the issues. A candidate questionnaire is a great way to get the policies you care about in front of candidates, while also hearing their policy solutions and proposals.

By creating your own questionnaire—or using NAMI's sample questions—you can gather how candidates will address the issues facing your community. Your questionnaire must cover more than just one topic, but because mental health touches so many different issue areas, from health care to criminal justice to housing and more, it is easy to cover many topics.

Candidate questionnaires educate voters, but they have an added value when more than two candidates are in a race. For example, if there is a five-person contest for an open seat in the state legislature, it can be difficult for voters to compile all of the relevant information on these candidates themselves. That's where your questionnaire can help, which is why it can be especially useful during a primary election—when there are many candidates still in the race.

Share the responses without your commentary. This provides voters with the information they need to make an informed decision at the ballot box. By following the rules for remaining nonpartisan*, you provide your community with a crucial service: civic education without personal opinions, which reinforces NAMI's reputation as a trusted resource on mental health policy.

Candidate Forums

Voters want to interact with candidates and candidates want to interact with voters face-to-face (even if it is virtual). Candidate forums can be a prime opportunity to hear live from all candidates in a particular race.

Unlike a debate, which often doesn't lead to in-depth policy conversations, a candidate forum allows a wide-ranging discussion on the issues impacted by mental health. Asking questions on housing, criminal justice reform, education, employment, health care, and so on, allows candidates to directly address their larger vision for the community. And similar to a candidate questionnaire, asking each candidate the same questions provides a great, educational service to voters.



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Because of the rules governing nonprofit candidate forums—there must be two or more candidates participating in a forum—it is often easier to host a forum during the primary elections. However, it is still possible during the general election. Starting early may give you a better chance to get on the candidates' schedules.

NAMI has [several resources](#) to plan your candidate forum, including a sample planning checklist and sample ground rules that are compliant with 501(c)(3) rules. These resources can serve as a building block for your successful event.

But beware: these forums are a much heavier lift compared to candidate questionnaires. They can be time - and resource - intensive and there are many nonprofit rules to consider. Partnerships with other respected nonpartisan organizations can take some of the burden off of you and your team while increasing the likelihood that candidates will participate. Regardless, if you are planning a candidate forum, be sure to read up on the rules surrounding candidate forums early in the planning process*.

Candidate Engagement ↔ Advocacy

Ultimately, candidate forums and questionnaires are only tools to use in your overall strategy. It's important to consider how they can be used to achieve your goals.

Engaging with candidates should not be viewed as an activity to do every two-to-four years, with no other engagement in between elections. Candidates eventually become elected officials, and those policymakers play a role in your community's mental health system. Starting engagement during candidacy is important to relationship building and future advocacy efforts, regardless of which candidate wins the race.

**To review the rules surrounding candidate engagement, please visit www.vote4mentalhealth.org to find helpful resources.*

Contact NAMI's Advocacy & Public Policy team at elections@nami.org if you have questions or would like to strategize about how to engage candidates.