

**Sierra Club
Loma Prieta Chapter**

**Endorsement Team Leader
Training Manual
May 2007**



"Be the change you would
like to see in the world."
-- Gandhi

7/10/2007

This training manual is a compilation of the original 2003 training manual and portions of the 2005 updated manual. Other sections of the original documents have been moved to Team Member Manual and the City Watch/Increase Our Clout Manual's of 2007. - - The latest version will always be available on our Chapter website <http://www.lomaprieta.sierraclub.org/politics/> - - Ann Schneider, LP PolCom, June 19, 2007.

**Sierra Club Loma Prieta Chapter
Political Endorsement Team Leader Training Manual
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The most up to date version of this document can be found on the Loma Prieta Chapters website under the Political Committee Pages. Please visit <http://lomaprieta.sierraclub.org/Politics/index.html>. You may need a password to access any information that is designed for Endorsement Team Members and not for the general public. The Sierra Club Political Guidelines can be found at this link. You will need user name and password to access this information <http://clubhouse.sierraclub.org/go/policies/compliance/SCPCGuidelines>.

I. Introduction

Welcome to the Sierra Club candidate endorsement process! By participating in this process you are playing a very important role in securing the health of the vital web of life upon which we all depend and helping achieve a sustainable future.

The Sierra Club plays a special role in the environmental community where the political process is concerned. Due to its organizational status it can participate fully in the political process including campaigning, offering financial support and very importantly, campaign endorsements. Through our literature we reach many thousand voters who look to the club for guidance on many key issues.

To fulfill our mission we rely on volunteers like you to make this happen. While it helps to be informed, you do not need to be an expert on issues. We will help you.

This guide will describe all the major elements of the chapter's process for endorsing candidates.

*This document should be considered a **supplement** to the club's Political Committee Compliance Guidelines. If any conflict exists between the two documents the national guidelines document should be taken as definitive.*

II. Purpose of Endorsements

On the most obvious level the endorsement process is an effort to bring environmentally conscious individuals into public office. It may also at times be used to oppose individuals deemed likely to undertake seriously damaging actions.

However, it is also important to note that it offers an opportunity for several other important things. It is an opportunity to educate public servants and community leaders about the issues concerning the community irrespective of whether an endorsement is offered. It provides an opportunity for the club to educate itself about those same (would be) public servants. It helps establish a history of commitments that the club can reference ¹.

Finally, and very importantly, it provides an important avenue for citizens like you to participate and take ownership of the political process. Make the best of it!

III. Race Selection and Prioritization

While it would be ideal to cover all races every time, having sufficient volunteers to cover races is often a challenge, as with any volunteer activity. It is also extremely important not to overextend existing committed volunteers. Because of this it is essential to be selective about which races the chapter becomes involved in. Prior to beginning the coordination for the endorsement process the following considerations should be evaluated for any given seat.

- **Resources:** in general, availability of people will be a major constraint this needs to be weighed realistically with special attention to not causing burn out of existing volunteers as this damages the ability of chapter to build the organization. It is better to do few races and maintain a sustainable organization than to try to do everything and to lose the team immediately afterwards.
- **Open seats:** incumbents have a very strong edge for subsequent election. Open seats, due to term limits or retirement for example, however provide an excellent opportunity to bring in new legislators.
- **Key issues match to region.** Chapter priorities should be matched to the offices in question to determine which seats may be the most significant.
- **Rising stars and allies:** club endorsement is especially valuable to newer lawmakers and continued support of known allies (generally previous endorsees) provides for a continuing relationship. These relationships are vital to the club's legislative influence.
- **Key seat due to influence on other positions.** Many elected offices offer opportunities for appointments to other key roles.

¹ The Candidate Recommendation Endorsement Form completed for each race contains a summary of participating candidates positions on a wide range of issues. Our Conservation Issue Committees, e.g., Water, Zero Waste, Cool Cities, can use this information to prepare for meetings and outreach to those elected officials based on their responses in previous elections.

- **Local races (city council or county supervisors) with unopposed candidates are typically not engaged in by the chapter.** In such cases, club endorsement does not provide substantive value and lawmakers will not generally view it as significant. On occasion the chapter has made exceptions for known allies or if interviews provide the opportunity to educate candidates and the community.

The Sierra Club structures endorsement processes at four different levels.

- **Presidential Elections:** endorsements for Presidential elections are completed by members of the National Sierra Club Political Committee with input from National staff and National Conservation Committees. Volunteers who serve at this level have worked on State wide and local races and have a firm understanding of Sierra Club Policies and Campaigns.
- **US Senate Races and State Level Offices** (Governor, Lt. Governor, Secretary of State, Treasurer, Superintendent of Schools, Insurance Commissioner and Franchise Tax Board): Sierra Club California’s Political Committee creates team of members from around the state to meet with candidates for state level office. Chapter PolCom members who have served on local endorsement teams are welcome to serve on a state level team. These endorsements occur every four years.
- **US House of Representatives and Open Seats for California Assembly and Senate:** Whenever possible the Chapter tries to create a team with a majority of experienced volunteers. This means local chapter volunteers who have participated in at least 3 previous endorsement teams or have been on a team that has had to do a great deal of research in the process of awarding an endorsement to a candidate. *
- **County Board of Supervisors, City & Town Councils and Special Districts** (e.g., Open Space, Water, Harbor and Sanitary Districts): The Chapter is the lead on these races with an experienced Team Leader matched with 2 or more chapter volunteers.

* The Club’s rules allow for early endorsements and / or endorsements without a written questionnaire or interview for incumbents with very strong voting records supporting the environment.

IV. Endorsement Basics

A. Election Activity Lifecycle

Primary Elections – Primary elections allow individual political parties to choose the person from their party to run in the General Election. Some political parties allow voters registered as “Declined to State *” to vote in their primaries. Which parties allow for cross over voting is set by that party and may change year by year.

California has moved its primary election schedule several times over the last couple of years. Our Presidential primary for the November 2008 General Election will be on February 5, 2008. The Primary for State and Federal Level offices will continue to be held in June 2008. In general primary elections are held in even number years only.

* Many voters who consider themselves “independents” are actually registered “Declined to State”. There is a party called “American Independent Party” or AIP that is the Independent party created by Ross Perot back in the early 1990s.

This is a partial list (in alphabetical order) of acknowledged political parties in California: American Independent Party (AIP), Democratic (DEM), Green (GRN), Libertarian (LIB), Peace and Freedom (___), Republican (REP) and of course Declined to State.

General Elections - General Elections are held in November of each year. State and Federal level offices are always in even number years. Each year, even and odd, about half of the City Council races are held. Special Districts can also be held in even or odd years based on a set schedule.

Special Elections – Special Elections are held in for several reasons. Most common is when an incumbent of a City Council or Board of Supervisors has run for a higher office and won that election. The incumbent then resigns their current seat to accept the higher office seat and a special election is called to fill the open seat for the lower office. A special election can also be called when an incumbent resigns, is removed from office or has died. The remaining members of that office can choose to fill the seat via an appointment, to keep the seat vacant until the next regularly scheduled election or to hold a special election. The final situation that leads to a special election is where a candidate must receive at least “50% + One” of the voters in the General Election. If no candidate achieves the 50% + 1 then special

election or run-off election is called several months after the General Election. The top two or three vote getters in the previous election then run for the office in the run-off election.

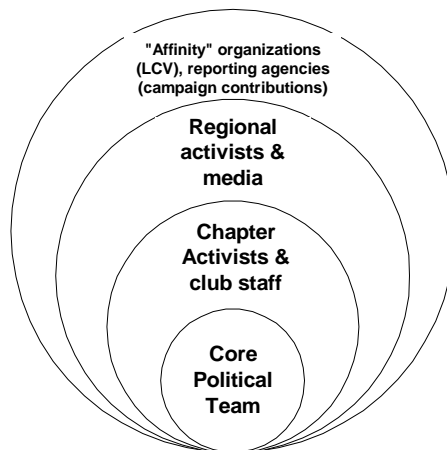
Special elections are very costly to the jurisdiction and to the Chapter as we have must create and send special mailers to our members for any of our endorsed candidates. This is one reason why the Loma Prieta Chapter supports “Instant Run-off Elections” or IRV as this is one way to conduct an election that requires 50%+1 in only one election.

B. Overview of Process

Stage	Description	Responsible Entity
Identify	Identify the races which are occurring, identify the candidates for the races, and determine which races to participate in based on available volunteers.	PolCom Leadership Team
Research	Research the issues to focus on and research the candidates (including questionnaires and interviews)	Conservation Committee, Executive Committee and City Watch Representatives – SCCal and National PolCom for State and Federal Races
Endorse	Endorse a candidate if appropriate. Follow approval procedures.	LPPolCom Endorsement Teams then to LPExCom
Support	Support the candidate with publicity and if possibly with volunteers for their campaign activities.	LP Staff – drafts press releases, Chapter volunteers & CAN – precinct walking, letter writing, phone banking.

See Appendix A. Contact Information for County Registrar of Voters = Links to Registrar of Voters

C. Research is drawn from multiple sources:



Key information sources include:

- The core political committee, chapter activists and club staff (for state offices, the Sacramento team should be solicited for input and similarly the Washington D.C. staff for national officeholders.
- See Appendix B: Sources of Incumbent Voters / Environmental Report Cards compiled by various organizations.
- Trusted local activists, often working in local “affinity” organizations such as the League of Conservation Voters or the Audubon society (*note that for 501c3 organizations such as Audubon any input provided by activists must not be publicized as reflecting the organization as they are prevented from engaging in direct political action. As policy such input is best kept confidential*).
- Government web sites with campaign contribution and voting records
- Local media

D. Role and Relationship with the League of Conservation Voters

While there are many environmental organizations in Santa Clara and San Mateo counties, only two participate in elections: the League of Conservation Voters and the Sierra Club.

Most environmental organizations depend on tax-deductible donations in order to fund their programs. Federal law disallows deductions if the receiving organizations participate in elections, but lobbying and informational activities are appropriate.

The Sierra Club long ago decided that it wanted to be active politically. As a result, donations to the Club * are not deductible. * Except donations to Sierra Club Foundation which are used for education on environmental issues and are tax deductible.

The only other environmental organization to be active in elections is the League of Conservation Voters (LCV). The League is called that because it is made up of representatives of other environmental organizations, such as the Committee for Green Foothills, American Lung Association, Silicon Valley Toxic Coalition, Audubon Society, and the Greenbelt Coalition, as well as the Sierra Club. With the exception of the Sierra Club, these organizations cannot participate in elections, and it seemed wise to set up a special organization to allow most environmentalists to participate in elections.

There are three major levels to the League of Conservation Voters. The national League of Conservation Voters makes all federal election endorsements. All state election decisions are made by the California League of Conservation Voters, which is headquartered in Oakland. The California League charters local chapters, such as the Santa Clara County Chapter.

Although their endorsements are almost always the same, the Sierra Club and League of Conservation Voters have different ways of deciding on candidates. The local chapter of the Sierra Club gets to decide local, state, and federal candidates within the chapter boundaries. The club also has a state level audit of the endorsement recommendations but reversal of chapter recommendations is extremely rare.

In contrast, the local League of Conservation Voters for Santa Clara County only decides on local non-partisan elections. The national League in Washington, D.C., makes decisions on federal candidates and the state League in Oakland decides on state legislators and statewide candidates.

This still leaves the local League chapter with a lot to do. Historically, the League has closely coordinated its selection process with the Loma Prieta chapter. LCV's asks candidates three standard questions, which the Loma Prieta Chapter has incorporated as the first three questions in any Chapter election questionnaire. (Refer to questions 1-3 on the Written Questionnaire Template)

The Santa Clara League may host environmental candidate forums. **This year the Forum is scheduled for Saturday, July 28 from 9 am to Noon at the Peninsula Conservation Center.**

The support of the Sierra Club and League of Conservation Voters is very important to candidates on the Peninsula, where arguably the voters are the most environmentally conscious in the country. The two organizations offer complementary support for candidates. The Sierra Club's publicity on their endorsements through publication in the Loma Prietan is tantamount to an additional mailer for a candidate to several tens of thousands of voters. On the other hand, the League contributes to candidates and produces its own slate mailer for major races such as the County Supervisor and San Jose Council races. In addition, the statewide League has 8,000 members on its Santa Clara county lists and sends them a mailer urging support for local and state candidates.

E. Staff Participation in Endorsement Processes

There is nothing in the national or state **political** rules that would preclude a staff member from voting on an endorsement recommendation as part of an Endorsement Team. Except for the requirement of a 2/3 vote by the Chapter ExCom, the national and state political rules do not try to dictate internal chapter procedures. Political decisions can be divisive, and it's best to avoid putting a staff person into a position where he or she is forced to take sides on a divisive question.

V. Process Steps from the Team Leader Perspective

A. Race Selection: The Leadership Team (PolComCore) prioritizes races (see Race Selection & Prioritization).

B. Calculating Membership Numbers by City or County

One month prior to the election cycle, the Leadership Team asks staff to prepare a report on the number of members who live in each jurisdiction. These numbers help us in choosing which races to work on and for Endorsement Teams to use at the interview to alert candidates that our endorsement can equate to a potential voting block.

The member numbers actually come in two categories, total number of memberships per address and total number of members. We use the first number for calculating the costs of printing mailing labels and the later as the number we give to candidates as

the “potential Sierra Club Voting Numbers”. These numbers will be posted on the Chapter’s political webpages. Specific URL (under construction).

Here is an example of what these numbers look like:

City	Number of Members by Household	By Individuals
Pacifica	430	454
Menlo Park	1013	1128
San Jose	3978	4170
Morgan Hill	304	313
San Mateo County	6,350	
Santa Clara County	12,364	

At this time we can not calculate the number of members by special districts, e.g., Santa Clara Water District 1.

The Leadership Team also asks National of the number of members by State Assembly and Senate and US House of Representatives. These numbers can be used with candidates for those races. We also use those numbers to calculate which California chapter takes the lead on the endorsement actions for that district. The majority chapter (greatest numbers of SC members in a district) is the Lead Chapter*.

* If the lead Chapter chooses not to get involved in a particular race the adjacent chapter may choose to take the lead.

C. Endorsement Team Selection: The Endorsement Team of at least three Chapter members is formed. One person agrees to become the Endorsement Team Leader. The Leadership Team begins forming Endorsement Teams at least three (3) months prior to the opening of the election candidate filing date.

Endorsement Team Members can not have endorsed a candidate in the race that they are a member of as this would be a conflict of interest. It is okay if they have a good idea of the environmental qualifications of any of the candidates and they can endorse a candidate once the Endorsement Teams recommendation has gone to ExCom. All voting members on the Team must be Sierra Club members and have paid their dues prior to participation on a team.

A Team Leader can request from the Chapter a list of members in that community and for their phone numbers to use to find residents to serve on the endorsement team. A script of this type of phone call is included in Appendix H: Forms & Scripts.

D. Steps for the Endorsement Team Leader and the Team:

1. **Identify Interview Location “Host”** - The Endorsement Team identifies a location for the interviews, preferable at a member’s home within the election boundaries. Volunteering to “Host” the interviews is very important as it confers local members making local decisions. If a member’s home can not be identified, other good locations include using a room at the local library or other public facility. Some interviews have been held at the Peninsula Conservation Center although this is considered a last option.
2. **Questionnaire Preparation and Identification of Local Issues (Race Specific):** The Leadership Team designs the basic written questionnaire. It includes standard questions asked of all candidates regardless of race. It also identifies some questions that are race specific or allow space for the Endorsement Team to add up to three (3) questions that are specific just to that race.
3. **Send Written Questionnaire and Cover Letter to all candidates:** Generally the Team Leader will send this out to each candidate as soon as the Filing Period has ended. The Cover letter includes the date of the oral interviews and the due date for the completed questionnaire. Team Leaders may ask one of the Team Members to take over the distribution of the questionnaire.
4. **Candidate Interview Selection:** Review questionnaire responses. Not all candidates choose to go through our endorsement process. If they do not complete the questionnaire then they are no longer eligible*. The Team may also choose not to endorse a candidate who completed a questionnaire that does not show strong environmental support. This may save some time at the interview, but then the Club loses the opportunity to educate this person about the environmental issues important to the Chapter and to the Club. If at all possible try to interview every candidate that has taken time to complete the questionnaire.

* Except for endorsements of incumbents with excellent environmental voting records. The Club can choose to endorse this type of candidate without a questionnaire.

5. **Research candidates:** Team Members may be assigned to do more background research on a candidates stated positions. This can include looking at the candidates legislative or community activists record by communicating with local activists and other web-based resources.
6. **Sierra Club Literature for Interviews:** Staff helps prepare packets of materials (Packets) for each candidate based on the Endorsement Teams Location and Race. The materials include the latest version of the Loma Prieta (newsletter), fact sheets about the Chapter and our priority conservation issues and other information such as San Mateo Counties Green Building Guidelines (donated to the Chapter by the County). The Team Leader, at least two week in advance of the interviews **MUST** contact staff and provide them with the number of packets to prepare for that set of interviews. The Team can then arrange to come by the chapter to collect the materials or ask Staff to mail them to one of the Team Members homes. If using the mailing option, allow for a full week for the materials to arrive.

The Loma Prieta's staff person for the Political Committee is:

Bill Young, Conservation Coordinator
Sierra Club, Loma Prieta Chapter
3921 E. Bayshore Road, Suite 204
Palo Alto, CA 94303
Phone: 650-390-8494 Fax: 650-390-8497
bill.young@sierraclub.org Web: <http://lomaprieta.sierraclub.org>

7. **Refreshments at the Interview** – It is not required to provide refreshments but it is nice to have at minimum, to have water for each team member and for the candidates. If the Team has a large number of candidates to interview then providing some light snacks can make the evening more enjoyable. The Chapter has not in the past reimbursed for refreshments but if this is an issue then please contact the Chapter's PolCom Chair in advance to discuss. (PLEASE, do not use water in plastic bottles as the Club has a campaign about bottled water.)
8. **Other Interview Meeting Preparation:** You may want each Team Member to have name tags (1). Ask the Chapter to mail you tags. Make sure you have a collection of pens or pencils (2) so Team Members can take notes. You should make one copy for each Team Member of the "Process Handout" and of the "Agenda/Interview Questions document" (3). You should have one copy for each candidate of the "Process Handout" and information packets (4). Also have a set of the new "Candidate Recommendation Interview Note Forms" (5) available for your team members to use. This is a new tool developed to help Team Members organize their notes in a way that will simplify the work needed to complete the "Candidate Endorsement Recommendation Form". This new tool has spaces set for each question in the questionnaire and for the interview questions.
9. **Conduct interviews:** Critical is to make sure that candidates understands SC process for endorsements. The Leadership Team updates the "Sierra Club Process Document" each year and a copy is given to each interviewee. Assign one team member to be time keeper/facilitator. Often this task falls on the Team Leader who is also taking notes on each candidate response. Sharing these duties eases the work for all.
10. **Initial Recommendation:** At the end of the Interviews the Endorsement Team votes on whom they want to endorse. In some cases a vote can **not** be completed due to the need for additional research but it is best to try to complete the recommendation that night. The decision is based on the written questionnaire and interview responses and above information make vote for recommendation for endorsement. Committee must approve with a 2/3'rds majority.
11. **Execute approval process:** The Team Leader prepares the "Candidate Endorsement Recommendation Form" and sends it to the PolCom Chairs who forward it onto the Executive Committee (ExCom). The Team Leader may need to attend the ExCom meeting to offer support for the Endorsement Team's recommendations. ExCom must approve with a 2/3'rds majority of voting members.
12. **Draft short Endorsement Article for Your Race:** In less that 300 words, draft a short article about why Sierra Club members should vote for the candidates your team and ExCom have endorsed. The Club does not do negative campaigning so we don't take about why some candidate is bad, instead we talk about why our candidates deserve to be elected. It is best to include 3 reasons why we support each particular candidate.

13. **Send Endorsement or No Endorsement Letter to Candidates:** The Endorsement Team Leader sends a letter and or calls the candidates with the outcome of process.
14. **Support Candidate:** Work with endorsed candidates on support activities: use of club name, issue press release and publicize in newsletter. If appropriate, undertake volunteer recruitment, phone banking, precinct walking.

VI. Election Calendar

Changes in voting habits have shortened the time the Chapter has to process and publish our endorsement recommendations. It is now estimated that over 40% of voters vote by mail (assuming the election is not done entirely by mail) and are voting weeks before the actual day of the election. This means that the articles about our endorsements for print materials must be at the print shop seven (7) weeks prior to the election so any mailed materials will be in our members hands by the day that absentee or mail only ballots are delivered to the voter which is generally one month before the election.

This has made the two to three week period following the closing of the candidate filing date a very busy one for the Leadership Team and the Endorsement Teams. If a volunteer wants to be active in the endorsement process we recommend that the volunteer try to keep their evenings free during that last two (2) weeks of August for general election endorsements and the last 2 weeks of March for the primary election.

The Election Calendar is very detailed. Do not be deterred. We have tried to include every minor milestone to help the Leadership Team, the Endorsement Team Leader, Staff and our Chapter ExCom to understand all the process steps. For a Team Member, just be concerned about one night that they will serve on an interview team. Look at the timeline for Team Leader actions. Go to <http://www.lomaprieta.sierraclub.org/politics/> for the latest timeline.

The Chapter's PolCom Website will have the most up to date calendar for any year's primary and general elections. Special elections; often used to fill seats when an elected officials has resigned due to election to higher office or removal from office; will require additional research to ascertain filing deadlines and the date of the actual election.

VII. Data Points

Decision making for an endorsement can range in difficulty from "slam dunk" endorsements for candidates with a proven record and wide approval in the Club and environmental community to cautious evaluations of circumstances based on limited information. For a full discussion of endorsement considerations please reference the Endorsement Guidelines of the Sierra Club National Political Committee Compliance Guidelines.

The compliance guidelines discuss in detail key considerations for an endorsement. However, it is worth noting that all of the following may be relevant to the decision:

- **Established policy record** especially on chapter and national priority issues: votes on bills, authored and sponsored bills, and public statements. For local races, especially new candidates, this is often not available.
- **Broad-based environmental record:** their record suggests a commitment to environmentalism rather than just selected issues.
- **Demonstrated recent commitment** to the environment in personal life or non-elective organizational activities.
- **Endorsements received** – just those from key community leaders and local environmental activists and if they have a large number of land developers or other business interests supporting their candidacy.
- **Third-party feedback:** trusted activists often have detailed knowledge of candidate histories (see Third-party Feedback Page 10)
- **Public statements and literature:** this can often signal a candidate's priorities.
- **Platform and position on issues:** this may be available from newspapers, as well as the questionnaire and interview.
- **Philosophical approach:** a candidate may not have a record to reference but their depth of understanding or degree of concern may suggest future action (naturally a proven record is the best measure of future intention).
- **Political Context:** how does this candidate stand relative to the others? Key candidates or issues and the overall context may be significant (see national guidelines). In city council races, another significant factor may be the number of seats open. In many cases organizations may support slates and setting a positive direction may be dependent on getting most or all of the candidates on the council. This may necessitate supporting a candidate, which is somewhat weaker than would otherwise be endorsed.

- **Relationship and Consistency:** having a good existing relationship with the candidate(s), especially incumbents, is a plus as is maintaining sufficient consistency for voters and candidates to view the Club's endorsement as meaningful in the long term.
- **"Leadership":** to what degree does the candidate push for environmental action as opposed to passively voting. Weight given this factor may depend on the context.
- **Viability:** Can the candidate win or run a strong substantive campaign. With local candidates this is often a judgment based on viability questions and context.

The more categories support a candidate the stronger the positive judgment. An endorsement should be based on a strong belief that the candidate's election would result in clear efforts to address environmental problems (or impede serious damage, in the less frequent case of a defensive endorsement). It is important to note that rarely is a candidate strong on all the issues. The strength of the candidate must be evaluated based on the overall context and the chapter priorities.

Philosophical Note: The Loma Prieta chapter has leaned towards endorsing viable "broad-based" environmentalists rather than "lesser evil" candidates. Also, candidates for higher office with no record have generally not been endorsed even if they appear to support environmental & conservation issues.

VIII. Third-party Feedback

As part of the local environmental community the Club has regular contact with other activists both at organizational and individual levels. It is not unusual for activists to participate in multiple organizations. Individuals over time become trusted for their activism and expertise in particular areas. These people serve as valuable references on those issues they or their organizations focus on.

This informal network often provides critical local knowledge on candidates and their records. This input is inexact and must be weighed based on experience and the issues in question. *These individuals and organizations must be widely considered trusted by ConsCom and ExCom and clearly support club policy positions on the issues on which they are consulted.*

The following are participation options:

A. Consultative

Trusted individuals may participate on a discussion/feedback basis. This approach would mean that they would not participate in the interviews but could provide comments on candidates either by email, phone or participation in our deliberation meeting(s). We could share the questionnaire responses with them too. These individuals would not formally represent their organization, would not vote on the endorsement, nor would their organization's name appear in any external literature regarding the endorsement.

B. Non-voting participatory

All of the above but the individual would participate in the interview as a local expert and interested constituent. This is somewhat grey and not the preferred option. In such a case the person should be a resident of the city/district in question. It is very important in this case that the individual not be identified as representing their 501c3 organization.

C. Full participation

Individual would join the Sierra Club and participate as a full political committee member. This is the ideal. The "selling point" to activists is that they can provide the perspective of their organization with a full vote. No other commitment is required beyond the club membership and attending the relevant endorsement meetings.

IX. Viability

The purpose of the viability criteria is to ensure that the political program retains effectiveness in the long term. If the club were to regularly endorse candidates that lost, the perceived relevance and value of the endorsement would likely decline in the eyes of voters and candidates. However, there is regular discussion within the club on the topic and its application is not an exact process. Evaluations are case-by-case but always incorporate the following considerations (more detail available in the Guidelines):

A. General Criteria

- Organizational support and planning. Does the candidate have an organization, do they present themselves well, and do they have a clear plan?
- Name recognition. Are they visibly active in the community such that they will be recognized by voters? If there are polls do they suggest support for the candidate?
- Endorsements. Do they have the support of relevant organizations and individuals?
- Financial support. How does the candidate's financial support compare to other candidates?
- Philosophy. Is the candidate's philosophy sufficiently in sync with the voters to be electable?

B. Contextual Considerations

- Endorsement of a long-shot candidate might be appropriate where the candidate has widespread and enthusiastic support among Club members in the area, and participation in the campaign will mobilize and energize Club volunteers.
- A long-shot candidate might also be appropriate as part of a long-range strategy to build public support for a candidate who is likely to have a much better chance of winning a future election.
- Endorsement might also be appropriate if the incumbent is so hostile to our views that we have nothing to lose, and a long-shot challenger with good public credibility is making the environment a centerpiece of their campaign.
- It is inadvisable to endorse a long-shot environmentalist in a three-way race involving a strong candidate who is hostile to environmental protection, a second strong candidate who supports environmental protection on a limited range of issues. This could result in the election of the hostile candidate.
- Be particularly cautious about endorsing a very long-shot challenger against a Republican incumbent whose record may be only so-so by our standards, but is well above the norm of the party's congressional leadership.

C. Types of questions asked to ascertain a candidate's viability.

These questions have been built into the standard written questionnaire and the last question asked at the oral interview. LCV prefers this question especially to be included in the oral interview. It can be asked as an update to the information provided in the written questionnaire.

- What kind of campaign staff have you assembled?
- How much money do you think it will take to win this race?
- How much have you raised?
- What kind of campaign strategy are you employing?
- Is Club political action important to you?

See Appendix C for Perspectives on Viability from Sierra Club Leaders from around the country.

X. Party Politics

The Sierra Club is a non-partisan organization. We endorse environmental leaders regardless of political party. Local races are considered non-partisan races, e.g., city council races. We do collect party affiliation on these races for statistical purposes only.

A. Green Party

This discussion of course has special relevance in relation to the Greens of which the following points have been discussed locally (at the Loma Prieta Chapter):

- We should be working with Greens for city council levels even if we do not initially support them to higher office (something which may be necessary for legal political party status).
- It is not realistic for Greens to expect support for higher office without coming from a reasonable position (i.e.: running for state assembly without coming from some public position like city council). However, exceptions are conceivable if the mainline candidates are very bad.
- The Greens need to improve planning/foundation building.
- We've had a number of cases where the Green candidate has not been very knowledgeable on environmental issues.
- Efforts to establish a measure of mutual understanding would be good.

B. Political Parties in General

As you work on more races you may find that even in non-partisan races, candidates with certain philosophical backgrounds choose not to participate in our endorsement process. In some cases they do not believe in endorsements of any kind. Others may say that we only really endorse members of a particular party (Democrats). This is an opportunity to explain that this is not true. That in fact we have endorsed Republicans, Green and Decline to State candidates. Sadly, a Party's philosophies, specifically those of the Republican Party, have moved so far away from supporting environmental concerns that many of their candidates are not strong on environmental issues. It is this that makes it appear that we endorse more candidates from the Democratic Party than from other Parties.

This is a very sensitive area. It is best to say we are non-partisan and we welcome any candidate to participate in our process where all candidates are treated equally.

XI. Conservation Objectives – See 2007 Conservation Issues & Local Actions Document at Loma Prieta website.

In the fall of each year the Chapter's Conservation Committee reviews active conservation issues within the Chapter. They also review National Sierra Club Conservation Goals and any California and regional conservation goals. This information is then defined as the problem and how local elected officials can do the right thing for the environment. This information is compiled in a document called "Conservation Issues and Local Actions for year the current year. This document can help PolCom members understand conservation issues that they might be unfamiliar with and how an incumbent's vote on or a candidate's position on would be evaluated as good or bad.

The document is divided into three parts: 1) a summary of the conservation goals; 2) detailed information on specific conservation issues across the Chapter and Club; and, 3) Geographically specific (i.e., city or race specific) actions.

This document is posted on the Loma Prieta Website and is available to members and the public. While Endorsement Team Members are not required to read the entire document, we recommend that every member at least review the major headings and any specific conservation actions listed for the jurisdiction on which you are serving.

XII. Documenting Recommendations

Each Endorsement Team is responsible for taking all the information learned about each candidate and paraphrasing that information into the "Candidate Endorsement Recommendation Form". Historically, the Team Leader has done this. This is a big job and the Team Leader could use any Team Member's help in preparing this document. A Team Member could help by doing any additional research that might be needed. Or they could help draft the Endorsement or Non-Endorsement Letters that will be sent to candidates. Or they could help the Team Leader draft some of the text for the "Candidate Endorsement Recommendation Form".

A sample "Candidate Endorsement Recommendation Form" can be seen in Appendix C. You will also see the Sierra Club California "State/Local Candidate Approval Form" or the Federal Form 1. The PolCom Chairs prepare the bulk of these mandatory forms and leave just a few portions for the Team Member to complete. In general, since the Chapter form requires more information than what the State or the Federal PolCom's require, we simply state see our form for explanation. Team Members need not worry about these forms. They are included just for background.

XIII. Confidentiality Issues

Candidate questionnaire responses are generally considered public, although the Loma Prieta chapter does not currently publish this information.

Endorsement recommendation forms should be considered confidential. These can be shared among core club activists and club staff, including Sacramento staff, but should generally not be distributed outside the club.

XIV. Common Endorsement Problems

1. Should you endorse an incumbent who is good on federal and or state issues but disagrees on some of the local club priority issues?

Keep in mind that the Sierra Club has professional lobbyists who work with these legislators on a range of issues. To endorse or not to endorse based on one or two local issues while ignoring the voting record at the state or federal level can cause problems for our lobbyists and the Club's relationship with that legislator. Examples: Anna Eshoo over NAFTA vote Tom Lantos over War in Iraq Also keep in mind that the decision to endorse is based on multiple data points. And consider if the Club has been actively educating these legislators on local issues and why they are important.

2. How do you endorse in a multi-candidate primary for an open seat where the primary is decisive.

This is often the case for state and federal legislators. That makes the primary critical. Decisions are based for each party but multiple endorsements are only given if candidates in different parties have equally strong environmental records or positions.

The Club might also endorse a candidate who doesn't have the strongest environmental record or policies but the Club thinks that they are approachable and when they are running against a truly bad candidate. The Interview Team should be prepared to offer strong reasons why ExCom should approve this candidate.

Examples: Sally Lieber over Rosemary Stasek and Rod Dioridon Jr. in Democratic Primary

3. How do you choose to endorse the best viable candidate? Can you make a dual or triple endorsement?

Our job is to try to discern the best environmental candidate that also has the chance of winning. While the Club has made dual endorsements in single seat race, we try not to do this as it may cause confusion. We like to think that our members and the public respect our endorsement recommendations and that we have chosen the best environmental voice. Examples Joe Simitian and Ted Lempert in Senate race

4. What if none of the candidates are really environmental leaders?

It is not unusual for the Club to decide not to endorse any candidate in the race. This decision is often made when the interview team cannot find any real record of environmental action on the part of any of the candidates or when a candidate had good answers but has no real knowledge on how to run a viable campaign. The Club can and has offered limited action such as writing about the candidate in our election newsletter and pointing out some positive attributes but that the Club has chosen no action in this case. The Club might also offer access to member addresses so the candidate can mail information to our members in that race.

5. What does the Interview Team do when a local government incumbent is running for state/fed office?

This is the perfect example of being able to discern how the candidate worked for the environment at the local level. It is best if the Interview Team is comprised of people who live in that jurisdiction and have been keeping an eye on local environmental issues (even if they aren't state or local chapter environmental priorities) and can produce a voting record. The Team must be careful of candidates who claim credit for environmental actions passed by the Council when that member actually voted against those issues. The Team also needs to identify local environmental activists and get their opinions of the incumbent and the other candidates.

It is also critical that the written questionnaire contain questions that ask for specific examples of what the individual has done to help the environment and on what issues.

This is also where the new City Watcher program can come in handy.

Examples: Mayor Matt Pear, Councilwoman Dena Moser

6. What does the Club do with a long-shot challenger running against a bad incumbent in a safe district?

We might endorse so we can begin to build a presence in this race. Example: McNiemy v Pombo and Pat Gray v Lantos

7. What about a candidate running when a candidate is running for higher office no prior record?

This is difficult, as the club generally does not endorse for higher office without a positive record of environmental achievement. Generally this would be a no endorsement but possibly provide access to members via mailing labels.

8 what happens at the end of the night when you and the interview team are retired and it is time to decide who to endorse but some of the interview team members have not read the questionnaires? We are only human?

XV. Post Endorsement Support for Your Candidates

A. Access to Sierra Club Mailing Lists

Candidates endorsed by the Sierra Club can ask to contact our members directly. This is at their cost but the local chapter processes the request, which goes up to National Staff in San Francisco. If you candidate would like this service ask them to provide you with the US Postal service zip codes (that most closely reflect voting precincts). Then contact your Loma Prieta PolCom Mentor (usually one of the PolCom Chairs or our Compliance Officer) and / or Melissa who will help you complete the request form.

You can find the up-to-date requirements at <http://clubhouse.sierraclub.org/go/policies/compliance/SCPCGuidelines>.

A rate of \$75/1000 names (with a \$20 minimum) is charged to candidates/campaigns. We have tables that provide counts on Congressional Districts, State Legislative Districts, and Sierra Club Groups and Chapters. National does NOT have count tables on zip code ranges or counties.

Lists rented to campaigns exclude those individuals who do not want their name exchanged with outside organizations, and therefore will reduce membership counts by 20-30%. Orders will not be run without a commitment to pay from the requesting party. Phone lists and mail lists are different for any given subset of the Sierra Club membership, as phone lists exclude members who do not wish to receive phone calls. Therefore, phone lists and mailing lists are charged as separate orders, (i.e., ordering a phone list and mailing labels for a group of members will be charged as two orders). However, you can use one order form to request both a mailing list and a phone list, provided all other selection criteria and order information is the same.

If a member has requested that we not call them, we are legally obligated to never call them, regardless of the purpose of the phone call.

Candidates and campaigns may not order a phone list, as Club policy dictates that our phone list will not be rented, exchanged, or otherwise given to an outside organization. Chapters CANNOT use Chapter funds to pay for labels/lists billed to a candidate and then ask to be reimbursed. Individuals can pay for the labels (at the Candidate rate) and then be reimbursed by the campaign. However, we do not encourage this, due to compliance reasons.

B. Locally generated lists

Locally generated lists may not be provided to the candidate or campaign under any circumstance. All lists to be used by a candidate must be generated by the Label Desk. For Federal races, Chapters and Groups may never use a locally generated list.

A Chapter or Group may use a locally generated list provided that:

- a) The election in question is a state or local position; AND b) the mailing is produced and paid for entirely by the Sierra Club; AND c) the mailing is being sent exclusively to Club members. There is no charge from National for this.

For further information, call the National Political Desk at (202) 547-1141 or E-mail political.desk@sierraclub.org. It is best to coordinate this through the Chair of the Political Committee, as there is a cost involved.

C. Precinct Walking

A great way to get our members involved is to invite them to precinct walk for our endorsed candidates. The Team Leader can either send members directly to the candidate or can choose a day for members to all go to the candidates "campaign office" and walk together. Either way, also mention to the candidate that you are a Sierra Club member. The Candidate will remember that we helped them.

Members may be hesitant to do this as they feel they don't really know the candidate. The candidates campaign is happy to provide talking points and literature. Most of the time, literature is just dropped at the front door. (Literature delivered by a volunteer can not be placed in a mailbox, as that would infringe on the services provided by the US Postal Service.) That is why you find the literature under the front mat or tucked into the front door during campaign season.

Appendix A.1 Registrar of Voters for Elections held within our County

San Mateo County - www.shapethefuture.org
Santa Clara County – www.sccvote.org
San Benito County – www.sanbenitocountyelections.us

Appendix A.2 Registrar of Voters for Adjacent Registrar of Voters Contact Information

Santa Cruz County www.votescount.com
San Francisco County www.sfgov.org/elections
San Luis Obispo County www.sloelections.org
San Joaquin County www.co.san-joaquin.ca.us/elect

Appendix B. Sources of Candidates Votes “Environmental Report Cards”

The Loma Prieta Political Website will always have the most up-to-date links to organizations that research elected official voting records.

ACLU's National Freedom Scorecard

<http://scorecard.aclu.org>

action@dcaclu.org

Summary of important civil liberties measures and how your elected officials have voted.

California League of Conservation Voters (CLCV)

The California Environmental Scorecard

www.ecovote.org.

Comprehensive US Sustainable Population (CUSP)

Congressional Scorecard

www.uscongress-enviroscore.org

Humane USA PAC

www.humaneusa.org

Summary of votes to protect and provide humane treatment of animals. Like Emily's List they choose a certain number of races to support candidates who support legislation against cruelty to animals.

League of Conservation Voters (LCV) –

range of national environmental legislation

www.lcv.org

202 785-8683

National Parks Conservation Association (NPCA)

<http://www.npca.org/votingrecords> - no incumbent met their criteria in 2006 so they did not do a vote count or “Friend of the National Parks” award – Award is based solely on a member's voting record on legislation significant to the national parks.

Planned Parenthood Advocates Mar Monte –

Social Equity and Population criteria - Women's issues local govt candidates Gayle M. Tiller 408 297-9255 ext. 17 or Santa Clara and San Benito Counties
reproductiverightssj@yahoo.com

Population Connection (formerly ZPG)

“Not Making The Grade”

<http://causenet.commoncause.org/afr/dbq/officials/>

<http://www.commoncause.org/publications/ereform/toc.htm>

m state-by-state grades

<http://www.commoncause.org/publications/ereform/summary.htm>

ProgressivePunch

<http://www.voterpunch.org/>

Non-partisan searchable database of Congressional voting records from a Progressive perspective. Shows the performance of members within 125 different issue categories and detailed vote descriptions.

Sierra Club

Sierra Club California

SierraClubCalifornia.org

Environmental Voting Records of the California Congressional Delegation and Presidential Candidates, 2004

www.sci.sdsu.edu/salton/CongEnvVoteRec.html

Department of Biology and Center for Inland Waters
San Diego State University

National Caucus of Environmental Legislators - NCEL

An organization of progressive, environmental state legislators that communicate their strategies to enact good legislation. <http://www.ncel.net/>

Washington Post's US Congress Votes Database

<http://projects.washingtonpost.com/congress/>

<http://mygov.governmentguide.com/mygov/dbq/officials>

Plug in your Zip Code+4 and get a complete access list and even some voting records

Appendix C: Perspectives on Viability

SUSAN LeFEVER, Rocky Mt Chapter Director (CO): The Rocky Mt Chapter endorsed a long-shot candidate for Governor who is a credible candidate. He has raised over \$1 million, he has broad community support and experienced campaign staff, and he appears in the press regularly with an environmental message. We declined to endorse a candidate for Congress who has raised less than \$5000, has no campaign manager, is not doing the basic work required to run a campaign, and has not been endorsed by any organization other than the Green Party. (10/24)

AL RICHARDSON, Lake Erie Group Pol Chair (PA): The problem is to avoid severing access to the environmentally-unfriendly incumbent who will surely be re-elected. Endorsing the no-chance challenger may eliminate any opportunity to educate and persuade the incumbent to take better positions. But if it would be futile to try to educate and persuade the incumbent, then we should endorse a good environmental challenger, regardless of viability. (10/24)

ALAN TONEY, Metro Atlanta Group Pol Chair (GA): Endorsing a long shot is OK if the projected winner has a terrible voting record, but it is foolhardy to endorse a non-viable candidate when control of the Senate is in jeopardy and a viable opponent has a fairly good record. (10/24)

PAUL ARMS, Orange Co Group Pol Chair (CA): The viability criterion is important for the Club in managing volunteer time and resources. The only time I have a problem with it is when it is used to thwart a candidate who has a real history of environmental involvement in the district and who is respected in the community.

DICK WORTHEN, Piasa Palisades Group Pol Chair (IL): An assessment of "viability" is problematic; it is as much a guess as anything. I do not care about the Club's won-loss record at the end of an election cycle. Discussion and support for our issues is more important. I would eliminate "viability" as a criterion for endorsement. (10/24)

BETSY JOHNSON, Montgomery County Group Pol Chair (MD): We want to put our support behind candidates who have a chance to win, so that we will have influence in the legislative bodies where we need to forward our agenda. The Maryland Chapter endorsed a Green Party candidate this year because she understood that viability was important, as shown by her campaign plan, her money-raising ability, and her practical approach to getting elected. (10/25)

PEGGY MALCHOW, Rocky Mt Chapter Pol Chair (CO): A "viable" candidate is necessary in order to achieve the Club goal of getting candidates elected who will do good things for the environment. We also have the goal of informing the public about which candidates are voting for the environment and which are not. In some cases we should endorse a long-shot challenger to an incumbent with a very poor voting record if the challenger is credible enough to get his/her environmental positions before the public. (10/28)

BEN ZUCKERMAN: I haven't yet had time to digest and systematize everyone's comments, but I would like to make something clear to anyone who might still be considering sending me an opinion. I think there is an imbalance in the Club guidelines between the short term goal of winning political races vs. the longer term goal of communicating the core Club messages. If a third party candidate is carrying this message, (s) he may deserve Club support even if (s) he has virtually no chance of winning. (10/27)

CARL POPE: If we shift more of the Club's political work to a longer-term perspective, there is more than one strategic pathway available. We could support more third-party candidacies, but in practice third-party candidacies are usually destructive of the values they espouse. Alternatively, we could shift more of our effort into primaries as a vehicle for positioning real environmental leaders. We could also shift more of our effort into grooming real environmental leaders in state and local races, where we can recruit and support future candidates for the US Congress. (10/28)

Appendix D: Getting More Involved with the Sierra Club Political Committee

A. National Level – Sierra Club Political Committee (SCPC):

For Political Committee Chairs and Compliance Officers – Restricted Listserve to be used by the National Polcom Committee to send critical updated information to all chapters regarding the Sierra Club endorsement and political activities. The listserv is: CONS-SCPC-POLITICAL-CHAIRS@LISTS.SIERRACLUB.ORG Contact : Richard Isaac, SCPC Communications, (H) 973-716-0297, Risaacx@aol.com

For Political Committee Chairs, former Chairs, Compliance Officers and other key chapter PolCom activists – This is an open Forum for listserv member to ask questions related to political activity.

B. Sierra Club California

California is unique among the Club in that we have 13 Chapters in one state. All the other states have one chapter that covers that entire state. Because of this, we have an additional organization; Sierra Club California with its own Executive Committee, Conservation Committee (called the Regional Conservation Committee or RCC) and a statewide Political Committee.

The Chair of the Calif. Political Committee is Howard Strauss - HTStrauss@aol.com. This committee has its own listserve. They serve two major purposes: 1) to ensure that each Chapters endorsement process is fair and consistent and 2) to create endorsement teams for statewide offices like the Governor and Attorney General. They encourage local political committee people to serve on one of these state teams (every four years).

Appendix E: Sierra Club Resources for Post Endorsement & Candidate Support Activities

Compliance Officer: We are fortunate to have our own Compliance Officer. Other Chapters in California share a Compliance Officer under the rules of Sierra Club California. The Compliance Officer's job is to be versed in the latest federal election law and to make sure that the Sierra Club follows any changes to election law or to the regulations or guidelines required of non-profits involved in elections. If you have any questions about whether or not a particular action you would like to undertake for a candidate, please check with our PolCom Chair at politics@lomaprieta.sierraclub.org and with our Compliance Officer at Compliance@LomaPrieta.sierraclub.org

Fund Raising / PACs: Our chapter does not yet have a PAC so we can not raise funds to be used for specific candidates. We would like to create this tool but as June 2007, we have not begun the process.

Appendix: Mock Endorsements - Exercises

1. The Race: Democratic primary for state legislative office in safe Democratic district

The Candidates:

Elaine Croft

Croft currently serves as mayor of the city of Los Lagos. She has been an environmental ally, working on issues such as water quality and trails. In her position as a regional transportation representative, she has supported club positions. Croft is running on an environmental platform and will likely be a strong leader is elected to statewide office. Her campaign is well funded, including a significant amount of self-funding. Croft enjoys clear support from local environmental activists.

Kevin Clark

Clark serves as mayor for another local city, Los Magos. He also served as a transportation delegate has expressed support for the club's transportation priorities. Clark often touts his own environmental accomplishments but some local activists are disappointed with his lack of support. His campaign has significant funds from many sources, including several large donations from developers. Some more moderate environmental legislators have endorsed him.

Christine Wagner

Wagner is also a Council member in the city of Los Lagos. In her years on the Council, she has spoken out for open space preservation. Wagner generally supports club positions but is lukewarm on most issues and is not seen as a leader. She has significantly fewer monetary resources than the other candidates and is generally not considered viable.

The Politics:

Kevin Clark is very politically connected and his endorsement list contains many prominent figures. He is widely viewed as the front-runner in this race. Elaine Croft is expected to mount a very credible campaign and could be a significant force in the race. There is some concern that, with Croft and Wagner running from the same geographical base, the Los Lagos vote will be split between those two candidates.

2. The Race: Democratic primary for state legislative office in safe Democratic district

There will also be a Green party candidate running in the general election and since the club does not want to make one endorsement in the primary and then switch its endorsement for the general election, the Political Committee is evaluating all candidates at this time.

The Candidates:

Dirk Charniak

Currently serving as mayor of the city of Santa Serena, Charniak clearly has knowledge and experience with environmental issues. He expresses strong agreement with the club on development and sprawl issues, and has pushed for transit-oriented development in Santa Serena. Charniak originally opposed a club transit initiative but changed his position at the last minute. The club's top priority in this district is a large construction project (the Sand Ridge development), which would cause significant damage to habitat. Charniak has not taken a position on this project. With adequate funding, volunteer power, and media consultants he is considered a very viable candidate.

Peter Ridgefield

Ridgefield is a local executive and a member of the Santa Helena planning commission. He considers himself an environmentalist and is very sincere in his environmental beliefs, but lacks in-depth knowledge of the issues. During his time on the planning commission he did not develop a notable record. Ridgefield says he will make the environmental priority if elected, and he supports the club's position on Sand Ridge. His campaign has abundant self-funding but he lacks political connections and does not expect to receive any valuable endorsements.

Connie Johnson

Johnson is very active within the Green Party and has been elected to several positions within the party, including national leadership. She is knowledgeable on many issues and has experience as an air quality monitor. She supports the club's positions on transit and other issues, and has taken an active stand against the Sand Ridge development. She would be an excellent environmental ally in the Legislature. Johnson lacks the funding levels of the other candidates. However, she is running a very serious and well-organized campaign.

3. The Race: Democratic primary for state legislative office in a safe Democratic district

The Candidates:

Ellen Wright

Wright is currently a member of the state Assembly and has a long history of public service in elected office at the local level. The club has worked closely with Wright during her Assembly term to support and author environmental legislation. She has many other legislative priorities also and does not intend to sit on an environmental committee, but has been a reliable environmental ally and has taken the lead on some issues. Wright is seen as a legislator who is very effective as building coalitions and getting legislation passed. She enjoys strong support in her home district.

Rebecca Kaplan

Kaplan has been out of the state political arena for a few years. Previously, she served several terms in the state Assembly and also has a long history of public service in local elected office. While in the Assembly, Kaplan was an environmental star. She authored and passed critical environmental legislation and was chairperson of the Transportation Committee. Environmental issues would be her top priority. Since Kaplan has been away from the scene, her campaign would benefit from an early endorsement.

Both candidates are considered viable.

The Politics:

Either candidate would be an environmental ally in the legislature. With two environmental candidates competing, the club runs the risk of alienating one candidate by endorsing another. There is also some concern about making an early endorsement given that Wright is currently an Assembly member; the club does not want to harm that relationship and risk current environmental legislation.

4. The Race: general election for U.S. Congress, safe Democratic district

The Candidate:

Teddy Rollins has represented Assembly District 7 (AD7) for the past eight years. Although the environment is not one of his priorities, he has generally proved to be a fairly reliable environmental vote, with an 83 percent LCV rating. However, local

activists are upset because AD 7 contains many hotly contended open spaces and Rollins has consistently supported recreational activities over habitat protection.

The Politics:

As an established incumbent, Rollins is running unopposed. The club has endorsed Rollins in the past.

5. The Race: special election for city council seat, nonpartisan race

The Candidates:

Rachel Holloway currently serves on the San Hugo planning commission. This experience has given her more knowledge about local politics and she uses appropriate terminology when speaking of environmental issues. She is a big proponent of renewable energy and green building design but is less enthusiastic about mass transit. There's little information in her planning commission record to indicate how she would vote on environmental issues.

Sandra Ramirez is a long time resident of the city of San Hugo and currently heads up her local Neighborhood Association. Soft-spoken and levelheaded, she is endorsed by many community leaders. Sandra is very sincere in her desire to help the environment, but has very limited knowledge of the relevant issues. With no experience in city affairs, Sandra has no existing record.

Both candidates are considered equally viable.

The Politics:

Holloway is generally seen as the more qualified candidate due to her experience on the planning commission. However, there is some concern about her connections to a pro-developer and generally unsavory local politician.

Appendix G: Forms, Letter and Scripts used in Endorsement Process

These forms, letters and scripts change with every election cycle. It is always best to check on the website for the most recent templates of these documents. The Loma Prieta Political Committee Leadership Team makes modifications each time so the templates are current and to make them more easy to use. These changes are based on comments the Leadership Team receives from you at the end of the endorsement process.

Below is the list of forms and letters used for each endorsement process. You can find the forms, letters, scripts and other documents by going to: <http://www.lomaprieta.sierraclub.org/politics/campaigns.html>, then look for Forms & Letters, Timeline, Scripts and other information placed at this site to help you with the endorsement process. You will also see a section for potential candidates so they can learn about our process. We want our process to be as transparent as possible and we are proud of the process and the fairness in which we try to conduct all Sierra Club endorsement activities.

Each form is made as a template that can then, with only minor edits, be tailored to the specific race in which you are the Team Leader. Instructions are in italics. These instructions can then be deleted after the modifications to that document have been completed. There are no short cuts. Sierra Club policy dictates the process from which our Chapter has developed these forms and tools. Please contact the Political Committee Chair(s) at their individual email addresses or phone numbers or use politics@lomaprieta.sierraclub.org or contact your mentor if you have any questions. We try to assign a mentor to all first time Team Leaders. We, the more senior Political Committee members are here to help you through this process.

A. Endorsement Letters and Forms Used by Team Leader and Team Members

1. Sample Candidate Interview Notification Letter

The Team Leader or a member of the Team should send this letter to every candidate who has completed or "filed" his or her documents to run for the office or "Race" the team is working on. It is best to use email. Most candidates will now have an email address. The Team just needs to add the name of the candidate, the date of the interviews and the Team Leaders contact

information. If you are working with LCV, you will need to coordinate the date of the interview with their team. It is best to both copy the letter into the text of the email and as an attachment.

2.a. Local Government Supervisor and City Council Candidate Questionnaire Template

The Leadership Team updates this questionnaire but the Endorsement Team, or Team Leader can add up to three (3) questions that are specific to that race. The Conservation Committee may have identified a question for your race and if so you will find it at the bottom of this template. Please use that question(s) as part of the race specific questions. The most critical questions should be on the written questionnaire, important but less critical questions can be one of the up to three (3) questions that

2.b. Sample Questionnaire for State & Federal Office

The State Political Committee along with our Lobby staff in Sacramento develops the questions to ask for state assembly and senate offices. The local Endorsement Team can add a couple of questions specific to the local chapter. These questions are developed in the fall of odd number years.

The National Political Committee each fall of odd number years, creates a list of questions for Federal Office. This list can have as many as 40 questions. Many are not applicable to our area. The Endorsement Team for these races chooses up to 10 or so questions for these races.

The questionnaire is attached and copied into the email sent to the candidate along with the Candidate Interview Notification Letter.

3. Interview Format & Questions Template

This document includes the steps the Team will use during the in person interview. The Team Leader will assign specific questions to each team member (and LCV member). The same person asks the same question at each interview. This schedule helps the Team stay on schedule as there is a tendency for interviewees to run over their allotted time.

4. Interview Schedule Template

This is the schedule of candidates and what time they will arrive at the host location. Allow for 20-30 minutes per interview and 10-15 minutes to discuss how that interview went. Also allow 30 minutes at the end for the Team to make its decision on whom to endorse. Also ask all Team Members to arrive 15 minutes prior to the first interview so each person can be assigned a question to ask the candidate.

5. Team Member Interview Night Notes Template (new)

This is a new form that is basically cut from the Endorsement Recommendation Form. The intent is each Team Member can use it to write down their perception of the candidates response to the questions asked at the in person interview. The Team Leader can then use these notes to help write the responses into the Endorsement Recommendation form.

6. Process Handout

This document tells the candidate about the timing of our process and how our name can or can not be used. Each candidate must leave the interview with a copy of this document.

7. Sierra Club Loma Prieta Candidate Endorsement Recommendation Template

This is a word document that makes use of Tables. It can be difficult to learn to use but gets easier with practice. This is the document where the Team Leader paraphrases the candidates' responses from the interview and the written questionnaire, on specific environmental issues. The key word here is paraphrase. While candidate contact information can be cut and pasted into this document, their responses or environmental goals need to be boiled down to just a couple of sentences. Please do not cut and paste the candidates written responses into the respective table. It makes this document too long and unwieldy.

Please contact your Mentor or the Political Committee Chair(s) if you have any questions about completing this form.

8. Sample Candidate Endorsement Notification Letter

This is the letter to send to candidates we endorse. Sending by email is appropriate.

9. Sample Candidate Non-Endorsement Notification Letter

This is the letter to send to candidates we endorse. Sending by email is appropriate.

10. Sample Press Release

Chapter staff now creates the press release for all races. But it helps if the Team can identify 3 environmental issues that demonstrate why the Club thinks they will be the best person to elect.

B. State & Federal Approval Forms

1a. Sierra Club California "State and Local Candidate Approval Form"

Our Leadership Team adds this form to the bottom of the Candidate Endorsement Recommendation form and completes this portion after ExCom votes to approve the Endorsement Team's recommendations. The Team Leader does not have to worry about completing this form. In many ways it is redundant to our form and the Leadership Team simply inserts "See Above". Advanced Team Leaders may want to complete this part of the form but it is not required.

1b. National Sierra Club Political Committee "Federal Form 1"

This is the form required by the National Political Committee and our Lobby Staff in Washington DC. In most cases the Team Leader for this process is a senior chapter Political Committee member and completes this form. The use of the Chapters Candidate Endorsement Recommendation Form is not usually used for this level of endorsement.

C. Scripts

1. Endorsement Team Member Recruitment

This is a script that the Leadership Team or the Team Leader may want to use to try to get more residents who are Sierra Club members to serve on the Interview Team.

2. Precinct Walking Recruitment

The Team or others in the chapter may decide that this race is extremely critical to the Chapter and then use this script to contact members to come out and work for this candidate. This was done for Jerry McNerney in his successful run against former US Representative Richard Pombo in the Congressional District 11 race in 2006.

3. Educating Members about Issues Important in This Campaign (get from CAN)

The Chapter's Citizen Action Network makes phone calls to members in specific geographical regions to educate them about environmental/conservation issues in their community. Sometimes this is considered a campaign action (c4 funding) and sometimes it is just issue education (c3) funding.