"Be the change you would like to see in the world."
-- Gandhi
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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/SCPCGuidelelines.
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 answer. To view the national documents go to [http://clubhouse.sierraclub.org/politics/compliance/default.aspx](http://clubhouse.sierraclub.org/politics/compliance/default.aspx).*

II. Purpose of Endorsements

On the most obvious level, the endorsement process is an effort to elect leaders with strong environmental positions and who will take positive action if elected to 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 helps establish a history of commitments that the club can reference. It provides an opportunity for the club to educate itself about those same (would be) public servants. Finally meeting face to face with candidates begins to establish a relationship between the Chapter and the candidate. These relationships are critical in helping the Chapter pursue conservation and recreational goals.

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. Election Overview

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 “No Party Preference” 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, February 2008 Presidential Primary, March or June statewide office primaries. The Primary for State and Federal Level offices will continue to be held in June 2010. In general primary elections are held in even number years only.

* Many voters who consider themselves “independents” are actually registered “No Party Preference” formally called “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.

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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.
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 (P&F), Republican (REP) and of course Declined to State, which is now known as No Party Preference (NPP). The Reform Party of California has filed paperwork with the California Secretary of State to become a valid party (June 2012).

**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 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 Voting” or IRV as this is one way to conduct an election that requires 50%+1 in only one election. Typically the San Jose City Council or Mayoral races go into special elections and occasionally the Board of Supervisors as incumbents in those offices run and win elections to State Assembly.

**B. Overview of Endorsement Process**

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify</td>
<td>Identify the races, which are occurring in any particular election cycle and determine which ones to participate in. Participation in races is dependent on availability of volunteers as well as the importance to the Chapter and the competitive nature of a race. The Loma Prieta Political Committee “Core” group usually decides which races are chosen.</td>
</tr>
<tr>
<td>2.a. Research - Issues</td>
<td>Research the issues to focus on and create chapter wide questions (for the written questionnaire and oral interview), that will demonstrate how well informed a candidate is on issues critical to the Chapter, the State or nationally. Each year updated questions are placed in the Template Written Questionnaire document and in the Template Oral Interview Agenda document. See LP PolCom website for updated versions.</td>
</tr>
<tr>
<td>2.b Research - Candidates</td>
<td>Endorsement Teams also do race specific research to ascertain jurisdiction specific environmental issues and tailor the template questionnaire to fit that specific race. Members of the endorsement team may also conduct research on candidate positions and voting record. This information is added to the Final Candidate Recommendation Form for that race.</td>
</tr>
<tr>
<td>3. Endorse</td>
<td>The Endorsement Process has 3 approval steps. The Endorsement Team (ET) may choose to endorse a candidate(s) or to do “action short of endorsement” as appropriate. The ET’s recommendations then go the Loma Prieta Executive Committee for a vote and then the recommendation goes to the Sierra Club California Political Committee who verifies that proper process was followed.</td>
</tr>
<tr>
<td>4. Support</td>
<td>Support the candidate with publicity and if possibly with volunteers for their campaign</td>
</tr>
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activities. Typically we send out a news release, list the endorsements on the LP Political Committee webpages, publish a Voters Guide that is sent to all members and when we can send volunteers to precinct walk or do other Get Out the Vote Actions (GOTV).

The Loma Prieta Chapter manages all the local government races from city and town councils to Board of Supervisor and special district races like the Water and Open Space Boards. We also conduct endorsement activities for State Senate and Assembly races. We also process the endorsements for the United States House of Representatives.

Sierra Club California organizes Endorsement Teams for state level offices like the Governor Lt. Governor, Secretary of State, Attorney General, Insurance Commissioners and other statewide offices. Generally, volunteers on these teams have already served two or more local chapter endorsement teams and have an understanding of how the political work at the Chapter level works with the state Political Committee and our Lobbyists in Sacramento.

The National Sierra Club Political Committee creates the Endorsement Teams for the Federal Senate races. Volunteers serving on these teams have many years of Sierra Club experience participating in endorsement actions before being chosen to serve on one of these two teams. This process is the same for any endorsement action in the Presidential election.

C. Research is drawn from multiple sources:

D. 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. Staff, who chose to serve on an endorsement team, do so as individuals and not as an employee of the Sierra Club. In other words, they do so “on their own time”.

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.

2 Due to Federal and State Election rules, all Sierra Club political action must be on pages that are “2 clicks” from other parts of the Clubs educational work. This has to do with the sources of donations. For more information on this issue refer to ‘compliance’ information at http://clubhouse.sierraclub.org/politics/compliance/default.aspx.
IV. Process Steps from the Team Member Perspective

The endorsement process must follow the timing set up by county election offices. The deadlines for the General Election and our deadlines to get the recommendations in print and in the hands of our members means that we have a very short time frame, basically 15 days from the close of the candidate filing period, to complete our endorsement recommendations. If you are interested in doing this type of volunteer activity, we recommend that you try to clear your schedule as much as possible during the 3 weeks following the end of the filing period. This generally means from **Aug 15 to Sept 1st** and for the June Primary from **mid March to late March**. Most of the work of the Political Committee is done in these two time periods.

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

2. **Endorsement Team Selection:** The Endorsement Team of at least three Chapter members is formed. One person agrees to become the Endorsement Team Leader. In a perfect world, the new Team Leader has served as a Team Member on several previous endorsement teams and can help guide new Team Members. All members must be Sierra Club members at the time the interviews are conducted and voted upon.

   In the past couple of years, as running for office has become more competitive (especially for open seat primaries races), and expensive, we are finding that some people and some members are trying to find even the “Perception of Bias” in the way the Sierra Club makes its endorsement recommendation. The Sierra Club and our Chapter are very proud of our transparent process and the quality of our decisions. However, to make it clear to the public and to protect our volunteers by providing some additional advice on avoiding the perception of bias, the Chapter adopted a guideline on “Perception of Bias” that can be found at [http://lomaprieta.sierraclub.org/politics/training.html](http://lomaprieta.sierraclub.org/politics/training.html)

   **NOTE:** Endorsement action is very politically sensitive. Team Members, Team Leaders and other Chapter Volunteers involved in the endorsement process must remember that what is discussed is CONFIDENTIAL and should not be shared outside the discussion of who to endorse. All votes are extremely CONFIDENTIAL. When in doubt, talk to the Chairs of the Political Committee or the Chapter Director for guidance on what to say when being asked by candidates, the public, the media or members not involved in the endorsement process.

3. **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. Any remaining race specific questions can go into the oral interview as long as the interview can be completed within the allotted time.

   **Note:** The draft Questionnaire is sent to the Chapter’s Conservation Committee (made up of specific environmental issue committees like Zero Waste, Wetlands or Sustainable Land use and Transportation) and the Chapter’s Executive Committee for recommendations on questions. In this way we are hope the questions are truly relevant to local conservation issues.

4. **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. The Endorsement Team may decide to send the questionnaires to candidates as soon as the City or County Clerk certifies them. This is up to the Team Leader with input from the Team Members. This would be an advantage to candidates who complete there application in a timely fashion but the Chapter will have a statement about this on the website and in the event a candidate complains you can direct them to that link. One reason for releasing the questionnaires as the candidate files is the interviews may have to be scheduled very close to the end of any extended filing dates. Any questions about this, contact one of the PolCom Chairs.
5. **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. Not all Chapters try to interview all candidates who have completed a questionnaire but in the Loma Prieta Chapter we try to do this.

* Except for endorsements of Incumbents with excellent environmental voting records. The Club can choose to endorse this type of candidate without a questionnaire. The Loma Prieta Chapter has fairly consistently done this for our US House of Representatives as all of them have historically had environmental voting records of 100% or very close to 100%.

6. **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 activist record by communicating with local activists and other web-based resources. The Political Committee encourages Team Members to contact the Chapters Conservation Issue Committees and Regional Groups for information on candidates who claim strong action on an issue or live within that geographic region. Contact the PolCom Chairs “mentors” for help to accomplish this task. This may not be necessary for many races as we may not have active groups in that area and have already received comments from the Issue Committees. However, if you need to know what the “right answer” is for an environmental issue that comes up in the questionnaire or in the oral interview, then going to the Issue Committee is the best action.

7. **Conduct interviews:** It is critical is to make sure that candidates understand SC process for endorsements. The Leadership Team updates the “Sierra Club Process Document” each year and a copy is given to each interviewee. Again, please remember that what is said or voted upon is CONFIDENTIAL and never shared.

8. **Initial Recommendation:** At the end of the interviews the Endorsement Team votes on their recommendations. 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 simple majority (50%+1). The Endorsement Team may decide to do an action short of endorsement. The Team Leader Manual goes into more detail on this action. It means that the Club won’t endorse but would make its member database available to the candidate. This action can be very useful in more conservative parts of the chapter or state where the voter views the Sierra Club as too radical, e.g., San Benito County races.

9. **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. The recommendation to be approved must receive 2/3rds majority of the total ExCom voting membership. The Loma Prieta ExCom is made up of 13 voting members so assuming no seats are vacant or out of the country, then each endorsement action must receive 9 out of the 13 votes. All abstention votes count as NO votes.

10. **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.

11. **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.

12. **EBlasts:** The Chapter now has the ability to send Get Out the Vote (GOTV) emails to members within a city or set of zip codes (for special districts). We have begun using this for GOTV efforts on close races. If you and your team feel the need for this for your race, let the PolCom Chairs know as these EBlasts need to be scheduled. The Club allows only two (2) EBlasts per month and one is usually set aside for chapter business, hence the competition for this tool and the need to schedule as far in advance as possible.
V. Election Calendar – go to lomaprieta.sierraclub.org/politics/ for the actual 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 50% 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 vote-by-mail or mail-only ballots are delivered to the voter.

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 you will serve on an interview team.

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 as to filing deadlines and date of the actual election.

VI. Data Points “The Club never makes a decision based on one issue or one vote.”

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 in the Team Leader Manual)
- **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 will 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.

VII. 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.

VIII. 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, Greens, Libertarians 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. Recently we have endorsed Libertarian leaning candidates but we have learned that when it comes to voting for an environmental issue, especially those that will require an ordinance or funding, that Libertarian elected officials will not support that environmental issue, i.e., will not vote for the ordinance or funding. 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.

IX. Conservation Objectives – See Conservation Issues & Local Actions Document on the LP PolCom 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 at http://lomaprieta.sierraclub.org/politics/training 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.

X. 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”.

If you have a little more time, please offer to help the Team Leader with any of the tasks listed above.

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 that what the State or the Federal PolCom’s require, we simply state our form for explanation. Team Members need not worry about these forms. They are included just for background.

XI. 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 or 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 Democrat primary.

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 of Mtn. View, Councilwoman Dena Moser of Palo Alto.

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: McNerney v Pombo (who second time around defeated Pombo) and Pat Gray v Tom Lantos after the war in Iraq support.

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? You can wait on the vote, but it gets harder to pull the vote together. Team Leaders should try to encourage their team members to review the questionnaires prior to the interviews. Sometimes the Endorsement Team only gets the questionnaire the night of the interview; in this case, you might give everyone a chance to read it there and then. It is your Team, if you think people need more time, give it them and do an email vote or a phone vote. If you need a conference call, contact a PolCom Chair for help.

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 – http://www.sbcvote.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.slocounty.ca.gov/Page517.aspx
San Joaquin County www.sjcrov.org/

Appendix A.3 Other Organizations Working on Election Issues
League of Women Voters www.smartvoter.org
VotesCount http://www.votescount.org/

Appendix B. Sources of Candidates Votes “Environmental Report Cards”
websites worked as of July 31, 2012 – If you see a problem please contact Political@LomaPrietaSierraClub.org.

The Loma Prieta Political Website will always have the most up-to-date links to organizations that research elected official voting records. Please let us know if a link no longer works. Once on the organizations home page look for terms like Scorecards

ACLU’s National Freedom Scorecard
http://scorecard.aclu.org

Summary of important civil liberties measures and actions@dcaclu.org

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how your elected officials have voted.

**California Coastal Commission**  
http://www.sierraclub.org/ca/coasts/  
Compiles by Surfrider, Sierra Club and others.

**California League of Conservation Voters** (CLCV)  
The California Environmental Scorecard  
www.ecovote.org.

**Common Cause**  
http://www.commoncause.org/  
Information on voting systems and voting rights by state.

**Comprehensive US Sustainable Population** (CUSP)  
Congressional Scorecard  
www.mnforsustain.org/cusp_enviroscore_voting_cards.htm

**Consumer Federation of California**  
http://www.consumercal.org/section.php?id=40

**Humane USA PAC**  
www.humanesusa.org  
http://www.hslf.org/voter_guide/  
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)  
Follows a range of national environmental legislation.  
www.lcv.org then click on scores  
202 785-8683  
LCV’s Online Vote Tracker for US Senate and House

**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/

**National Parks Conservation Association (NPCA)**  
http://www.npca.org/ They periodically get involved, recently giving awards to supportive elected. You may have to hunt around this website to find who is a park supporter and who is not.  

Also look for voting records - no incumbent met their criteria in 2006 so they did not do a vote count or “Friend of the National Parks” award – Awards are 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

**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 – Politics and Elections**  
http://www.sierraclub.org/politics/  

**Sierra Club California**  
http://sierraclubcalifornia.org/  
Click on Activist Tools then on Elections

**United States Government Guides**  
http://www.usa.gov/  

**Washington Post’s US Congress Votes Database**  
http://projects.washingtonpost.com/congress/  
Votes Database – name of legislator to get an overview of that elected officials voting record over time. Although at last check July 2012 this tool was not listed.

me voting records
Appendix C: Loma Prieta Chapter Candidate Endorsement Recommendation Form

For all forms go to http://www.lomaprieta.sierraclub.org/politics/

Appendix D: Sierra Club California “State and Local Candidate Approval Form”

The Leadership Team has added the latest version of this form to the Candidate Endorsement Recommendation Form. They have also completed most of the form to remove some of the work from the Team Leader.

Appendix E: National Sierra Club Political Committee “Federal Form 1”

This form is only used for the US Congress. This form can be found at: http://clubhouse.sierraclub.org/politics/compliance/scpcguidelines/form1.doc.

Appendix F: Mock Endorsements

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 if 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 and 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: Relationship to 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.

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.

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. Date, time and location will be sent out on the Chapters Political Committee Forum Listserv LOMAP-POLITICAL-COMM-FORUM@lists.sierraclub.org. To join the listserv please send an email to Political@lomaprieta.sierraclub.org.

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.