

# Candidate Screening & Endorsement Process Orientation

Houston GLBT Political Caucus PAC



## Welcome

- Overview
  - Who we are
  - Why candidates should seek our endorsement (What we do for you.)
  - Who can seek our endorsement
  - Inviting candidates to seek our endorsement
- Candidate Process
- Screener Process



## Who We Are

- The Houston GLBT Political Caucus Political Action Committee
- The Caucus PAC (HGLBTPC PAC)
- Political advertising paid for by HGLBTPC Political Action Committee, Vincent Pryor, Treasurer.  
PO Box 66664 Houston TX 77266-6664
- Non-Partisan Political Action Committee



## Why Do We Endorse Candidates and Why Should You Seek Our Endorsement

- Electing qualified individuals who support equality and the GLBT community to office improves the lives of all of us.
- What do we do for you, if you gain our endorsement?
  - Mailings
  - Social Media
  - Email Campaign
  - Work the polls
  - Speaking at events



## Who can Seek Our Endorsement?

- Any candidate regardless of party affiliation or lack there of may seek our endorsement as long as they meet the Standing Rules requirements:
  - 2.01. A candidate shall be eligible for endorsement only if he or she has completed all of the following:
    - a. Filed a Treasurer Appointment with the appropriate filing authority that specifically identifies the office the candidate is seeking.
    - b. Properly completed and submitted a candidate questionnaire within the parameters set forth by the Screening Committee.
    - c. Appeared in person for a screening interview with a screening panel. In the case of statewide candidates, a candidate may appear by teleconference or video conference.



## More Rules To Note

(Full set of Standing Rules are available on our website [thecaucus.org](http://thecaucus.org))

- Screening Committee Recommends - Caucus PAC Endorses
- 5.01. The Houston GLBT Caucus PAC shall not be obligated to endorse in any race.
- 5.02. Endorsements may only be made at regular meeting of the Caucus PAC, or at a special meeting called with a minimum twenty-eight (28) days prior notice.
- 5.03. Only members in good standing who have been members for a minimum of thirty (30) days will be authorized to vote for endorsements. Each eligible voter shall be given an approved credential to be displayed upon casting a vote.



## FAQ

- **Does a candidate have to identify as gay, lesbian, bisexual, or transgender in order to be endorsed?**
  - No. The Caucus has always opened its endorsement process to any candidate willing to seek our endorsement, regardless of sexual orientation or gender identity or expression. We endorse the best candidates for the job who will represent the GLBT community well.
- **When does The Caucus normally endorse candidates?**
  - The time frame for endorsement varies from election to election based on a variety of factors. The endorsement schedule can be set as early as our membership wants it to be, but typically we endorse no earlier than six months before an election and no later than two months before an election.
- **Does The Caucus ever make dual endorsements in a race?**
  - No. We limit our endorsements to only one candidate per race.
- **I decided to run for office after you endorsed - will you reconsider your endorsement so I can compete for it?**
  - Our Standing Rules of Endorsement require all candidates seeking our endorsement to meet certain requirements and deadlines in order to be eligible for endorsement. Once our membership endorses in a race, we generally do not reconsider that endorsement unless the endorsed candidates violated the terms of the endorsement.



## How We Invite Candidates To Seek Our Endorsement

- Email
- Social Media
- Mail
- Contacting The Political Parties
- Verbally at our meetings
- ... and ... any other way that seems reasonable



## The Process – For Candidates

- Sign Up
- Complete, Sign, and Return the Screening Questionnaire
- Show Up for the screening interview
- Complete the screening interview
- Attend the PAC endorsement meeting



## Sign Up

- Sign Up Tonight
- Sign Up Online
- Email: [screening@thecaucus.org](mailto:screening@thecaucus.org)



## Complete The Screening Questionnaire

- Please complete all of the questions
- Please return your screening questionnaire as early as possible
- Email the questionnaire to: [screening@thecaucus.org](mailto:screening@thecaucus.org)
- Please read and initial each item in the Terms and Conditions section
- Please sign your questionnaire



## ACKNOWLEDGEMENT OF TERMS AND CONDITIONS

- Please read and acknowledge the following terms and conditions by affixing your initials and signature in the spaces provided:
- I am intentionally seeking the endorsement of the Houston GLBT Political Caucus PAC.
- I understand that the Houston GLBT Political Caucus PAC is an organization that is committed to eliminating prejudice, violence, and injustice against gay, lesbian, bisexual and transgender people through education, activism, and political advocacy.
- If I receive the endorsement of the Houston GLBT Political Caucus PAC, I agree to publicly acknowledge the endorsement by listing it in any printed campaign literature that substantially promotes endorsements by other community or political organizations and on any Web page that lists other organizations' endorsements.
- If I receive the endorsement of the Houston GLBT Political Caucus PAC, I agree that I, my campaign, and my paid campaign staff will not publicly disparage or campaign against any other candidate endorsed by the Houston GLBT Political Caucus PAC.
- I have answered all of the questions in this questionnaire truthfully and to the best of my knowledge, and I have not intentionally or knowingly omitted information that might reflect poorly upon my qualifications or character and fitness for the office sought.
- I acknowledge that violation of any of these terms and conditions, or any intentional or knowing untruthful response, may result in the Houston GLBT Political Caucus PAC revoking its endorsement.



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- \_\_\_\_\_ I have answered all of the questions in this questionnaire truthfully and to the best of my knowledge, and I have not intentionally or knowingly omitted information that might reflect poorly upon my qualifications or character and fitness for the office sought.
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## Screening Interview

- Make sure you know where the interview is being held. We use several different locations.
- You may bring someone with you to the interview but they are not allowed to speak at the interview.
- Arrive a little early ... but not too early. You will be asked to wait while interviews scheduled ahead of yours are completed.
- Your interview time starts at the scheduled time so if you arrive late you may not have your full half hour.
- Try to answer the questions we ask. We are good at asking again if we feel the question was avoided.
- The end of the interview may be a little abrupt because we have to stay on schedule. If that happens, please be assured it is not personal.



## PAC Endorsement Meeting

- Plan to attend the endorsement meeting. You will be given the opportunity to speak to the PAC members.
- If you cannot attend, you may send a delegate.
- When your race is being considered you will be asked to leave the room but you may designate someone to stay and monitor the vote.



## Standing Rule 5.06 – 5.09

- 5.06. Out of respect and appreciation for the contributions and efforts of the volunteer Screening Committee, upon a vote to endorse in a particular race, a majority vote will be taken to affirm the recommendation of the Screening Committee as the endorsed candidate. Should the recommended candidate fail to be affirmed for endorsement, nominations will be taken from the floor for endorsement and subject to a majority vote.
- 5.07. Candidates shall not be permitted to be present during discussion and voting in their particular race. In the event a candidate is recommended or otherwise nominated for endorsement and is a member in good standing and eligible to vote, a single vote will be added on their behalf to the tally in their favor.
- 5.08. Candidates may designate an individual to monitor the counting of votes for endorsements in their race.
- 5.09. In the event no eligible nominated candidate receives a majority of the votes cast for a particular race, the Caucus will not endorse in that race.



## After You Receive Our Endorsement

- We will begin actively working to elect you and all of our other endorsed candidates!



Questions?



## The Process – For Screeners

- Training
- Sign Up
- Screening Interview
- Scoring
- Recommendation
- Endorsement Meeting



## Training

- Tonight's Orientation
- Scoring Reminder / Training 30 min before each series of interviews
- ... if you need more training ... let us know



## Reminder

(Full set of Standing Rules are available on our website [thecaucus.org](http://thecaucus.org))

- Screening Committee Recommends Caucus PAC Endorses
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- 5.03. Only members in good standing who have been members for a minimum of thirty (30) days will be authorized to vote for endorsements. Each eligible voter shall be given an approved credential to be displayed upon casting a vote.



## Sign Up

- Here Tonight
- On Our Website
- Email: [screening@thecaucus.org](mailto:screening@thecaucus.org)



## Before The Screening Interview

- Make sure you know the location
- Arrive at least 30 min before your first interview to review Scoring
- Ask any process questions that you have before the candidates arrive to start their interview
- If you are scheduled for several interviews back to back, make sure that you have any food or medication that you may need
- Spend some time before you screen thinking about issues that are important to you and the GLBT community



## Screening Interview

- Candidate will be invited in
- There will be brief introductions
- Candidate will be invited to give a brief opening comment
- All Screeners may ask questions
- The moderator will assure that everyone is allowed to ask questions



## Screening Standing Rules 4.02 & 4.03

- 4.02. No person who is an employee, contractor or volunteer for any candidate will be permitted to serve on any screening panel for the same office as that being sought by said candidate, nor will any member who has expressed support for or endorsement of any particular candidate during the current election cycle. Support may include, but is not limited to: public statements of support, monetary or in-kind contributions, volunteerism, and posting of yard signs, handbills, bumper stickers or other political materials that would give the appearance of support.
- 4.03. Screener assignments will be made by the Screening Chairman or his/her designee. Screeners will not be permitted to request assignment to the screening of specific candidates or races.



## Scoring

- Review of scoring sheet will be offered before each set of screening interviews
- Scores given on scoring sheets are one of the items to be considered in making a recommendation, but not the only item.
- Screeners may make notes on their scoring sheets to help them remember why they scored a candidate they way they did.
- 4.04. A member of the screening panel must be present to screen all candidates seeking endorsement in a single race. All candidate screening scores rendered by any screener who fails to do so will be discarded.



## Scoring Sheet Instructions

**Instructions:** Each screener shall score the candidate in each of the categories below by awarding a raw score between 5 and 1 in each category. The raw score will then be weighted, for a total composite score based on a 100-point scale. The raw score in each category shall be based on the following scale (please see separate scoring guidelines for each section):

- 5 – EXCELLENT
- 4 – GOOD
- 3 – AVERAGE
- 2 – FAIR
- 1 – POOR

Scoring shall be based upon the candidate's written responses on the Screening Questionnaire and any pertinent topics covered during the in-person interview. The following list of general questions is presented as a suggested guide. Specific questions about a candidate's experience, qualifications and knowledge about GLBT issues are encouraged.



## Scoring Sheet Categories

- I. QUALIFICATIONS (20 points)
- II. CAMPAIGN AND ELECTORAL VIABILITY (25 points)
- III. KNOWLEDGE OF MUNICIPAL ISSUES AND OPERATIONS (15 points)
- IV. KNOWLEDGE OF GLBT ISSUES (25 points)
- V. INTERVIEW (15 points)



## I. QUALIFICATIONS (20 points)

### Considerations:

- How much experience have they had in serving the public?
- What leadership have they shown in the community?
- In your opinion, is the candidate qualified for the office?

Score: ( \_\_\_\_\_ x 4 = \_\_\_\_\_ )

Total for this section: \_\_\_\_\_



## II. CAMPAIGN AND ELECTORAL VIABILITY (25 points)

### Considerations:

- How substantial is the candidate's political experience?
- Does the candidate have adequate funding and volunteer support? Is this support broad?
- Does the candidate have current endorsements from other groups?
- In your opinion, what are the candidate's chances of winning the race?

Score: ( \_\_\_\_\_ x 5 = \_\_\_\_\_ )

Total for this section: \_\_\_\_\_



### III. KNOWLEDGE OF MUNICIPAL ISSUES AND OPERATIONS (15 points)

**Considerations:**

- Does the candidate speak knowledgeably about municipal issues?
- Is the candidate able to answer the most basic of questions about how municipal government functions?
- Does the candidate speak to broader city issues, or concentrate on specific circumstances that affect them or people around them?
- Does the candidate have an understanding of how the City functions and how our municipal government operates?
- Does the candidate understand that the Office of Inspector General is responsible for addressing and investigating cases of discrimination and harassment in Houston?

Score: ( \_\_\_\_ x 3 = \_\_\_\_ )

Total for this section: \_\_\_\_



### IV. KNOWLEDGE OF GLBT ISSUES (25 points)

**Considerations:**

- Did the candidate support the Houston Equal Rights Ordinance?
- If the candidate does not have substantial or lengthy experience in GLBT issues, does the candidate have similar experience in other civil rights issues?
- Does the candidate have an understanding of the issues important to GLBT equality and civil rights?

Score: ( \_\_\_\_ x 5 = \_\_\_\_ )

Total for this section: \_\_\_\_



## V. INTERVIEW (15 points)

### Considerations:

- How did the candidate behave in the interview (e.g., argumentative, professional, aloof, engaged)?
- Did the candidate come prepared?
- Did the candidate rush through answers or appear to give the interview less importance than you thought appropriate?
- Does the candidate impress you as a strong candidate in terms of presenting his or her ideas?
- Does the candidate speak with the knowledge and authority desired in a public official?

Score: ( \_\_\_\_ x 3 = \_\_\_\_ )

Total for this section: \_\_\_\_



## SCORING

- Section I – Qualifications: \_\_\_\_\_
- Section II – Campaign and Electoral Viability: \_\_\_\_\_
- Section III – Knowledge of Municipal Issues and Operations: \_\_\_\_\_
- Section IV – Knowledge of GLBT Issues: \_\_\_\_\_
- Section V – Interview: \_\_\_\_\_

Additional  
Comments:

**TOTAL SCORE (MAXIMUM OF 100 POINTS ALLOWED):** \_\_\_\_\_

If we should endorse this candidate, we will be using social media to announce our support. Please provide us with a statement identifying the strengths of this candidate, a memorable moment in the screening, or a detail of interest:



## Recommendation

- 4.07. At the conclusion of each candidate interview, screeners shall complete a scoring sheet for the candidate that evaluates the candidate's questionnaire responses and overall interview performance. Once all candidates have been screened in a particular race, the screening panel will determine which candidate shall be recommended for endorsement, and will rank the entire slate of candidates from most to least favorable for endorsement.
- Recommendation does not necessarily follow the score given on the scoring sheets.
- Recommendation vote does not have to be unanimous.
- Results may be:
  - Recommend to Endorse a specific candidate
  - Recommend no endorsement
  - No recommendation – Leave it to the Caucus PAC



## Endorsement Meeting

- Screening committee recommendations and scoring sheet scores given by each screener will be given to all PAC members for each candidate. Screeners will be identified by name.
- Candidates and members will be allowed to speak.
- There will be a motion to accept all recommendations.
- There will probably be motions to remove specific races from the general motion.
- A vote will be taken on the general motion.
- If any races were removed from the general motion, the screening committee for that race will be asked to speak. The PAC members will ask questions then there will be a vote.



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Questions?

