

**VOTE NOW**

NATIONAL PTA®

# NONPROFITS, VOTING AND ELECTIONS

HOSTING A CANDIDATE FORUM

Published in cooperation with Nonprofit VOTE



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# INTRODUCTION

A candidate event is a great way to engage your community around an upcoming election, to build clout for the issues that matter to your organization, and to learn more about the candidates. Because nonprofits are considered to be neutral brokers with the best interest of the community in mind, your forum is a vital opportunity to increase public understanding of the democratic process and the issues affecting your community.

A candidate forum is a powerful tool for achieving the public policy goals of your nonprofit. Whether your organization needs funding, has a goal of changing state law, or simply wants to increase awareness of your issues or constituency, a successful candidate forum during a major election year will build awareness of your organization and the communities you serve.

Hosting a successful forum hinges on one factor: planning. And don't forget: when it comes to planning a candidate event — turnout is everything! By following the guidelines set out in this publication, and carefully developing plans and executing them, any nonprofit should be able to achieve its goal of hosting a successful candidate forum.

## KEEPING YOUR FORUM NONPARTISAN

When planning your nonprofit candidate forum, remember: nonpartisanship is your friend! Not only is it necessary for 501(c)(3) organizations, but it also encourages broad attendance by candidates, more interest from the media and is a powerful tool for engaging your community around the issues that matter to them.

### **Some guidelines from the IRS:**

- The forum should cover a broad range of issues.
- Each candidate should be given equal time to present his or her view on the issues discussed.
- The candidates are not asked to agree or disagree with specific positions or platforms of the sponsoring organizations.
- The moderator stays neutral and does not imply approval or disapproval of the candidates.

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Staying nonpartisan is pretty straight-forward. Here are some more tried and true tips from the experts:

### **Invitations**

- Invite all viable candidates for a specific office to your forum and make an equal effort to encourage each of them to attend.
- If it is a two-candidate race and only one agrees to attend, you should not go forward with your forum. In a multi-candidate race, at least two must confirm.
- Confirm with candidates! If it is a two-candidate race, and one cancels with very little notice (after having confirmed attendance) or worse — doesn't show up, you may go forward with the candidate event as planned. Just make sure to announce that this in no way signifies the endorsement of the attending candidate by your organization.

### **Questions**

You may want to have one or more staff members in charge of reviewing audience questions before handing them to the moderator. Your forum should avoid any leading questions that point to a desired answer from candidates. It's ok to ask straightforward questions on the issues but with some balance across partisan lines.

### **Ground Rules Inside the Forum**

- o *Partisan Attire:*
  - o While not required, you may want to ask audience members to check their partisan materials at the door. This means no partisan buttons or signs. This helps to create a sense of unity and nonpartisanship within the forum hall.
- o *The Audience:*
  - o In a nonpartisan setting, ask the audience to respectfully refrain from excessive exuberance for or against a particular candidate.

### **Site Selection**

Choose a neutral site for your forum — one that is not associated with any party, candidate, or overly partisan issue.

### **Literature**

Provide nonpartisan voter guides, voter registration, and get-out-the-vote materials for your audience. Have a separate table outside the room of the forum for candidates to place their campaign literature.

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# WHAT THE CANDIDATES WANT

It is helpful to have a clear understanding of what the candidates hope for in a nonprofit candidate forum. Use this information to entice candidates to attend.

## **1. A large audience!**

Candidates are spread very thin during a campaign season. They cannot attend every event to which they are invited. You and your co-sponsoring organizations should focus on turnout to increase the chances that candidates will attend. Be sure to communicate your expected audience size to the candidates in advance. Also, a large turnout at your candidate forum demonstrates that your organization has influence on voters.

## **2. A guarantee of neutrality**

Candidates will avoid any event where they think they could be ganged up on — especially if the media is expected to attend. In all of your communications with the candidates, remind them of the nonpartisan nature of the forum and share any ground rules you have established to keep everything neutral.

## **3. A trusted and well-respected nonprofit in the district**

Candidates are aware of nonprofits that have held successful and neutral candidate forums in the past and will be more likely to attend if those organizations are involved.

## **4. Time to meet informally with voters**

Schedule time after the forum for the candidates to speak one-on-one with voters and shake hands. Tell candidates about this opportunity in your invitation to them.

## **5. More information about your organization**

In your invitation to the candidates, briefly explain the mission of your organization and your constituency as well as how your organization affects policy. Inform candidates in an unbiased, nonpartisan way. Many candidates and elected officials already rely on nonprofits as resources for policy information.

## Engaging the Media

The media plays a critical role in the success of your forum. It might be easiest to think of engaging the media in two equally important stages: publicity before the event as well as coverage at the event:

**1. Media before** — draws a crowd, gets you publicity and makes candidates take the forum more seriously.

**2. Media at the event** — raises the profile of your nonprofit, raises awareness of the election and the candidates' positions, and makes your organization a source for future stories about the impact of elections on your neighborhood.

# SELECTING A FORMAT

## YOUR FIRST STEP IN PLANNING A FORUM

The first thing on your to-do list is selecting the format of your forum. When you decide, remember that it's important to select the option that BEST meets your community's needs.

### 1. Equal Time Q&A

An impartial moderator and panelists question the candidates, who are allowed equal response time. Traditionally, the candidates are unaware of the exact questions but know the established focus of the program. Candidates may answer the same questions or may be asked different questions, as long as each is given equal time to present their point of view.

### 2. Prepared and Spontaneous Debate

Prior to the forum, the candidates are presented with several prepared questions constructed to elicit detailed responses. A selection of these questions will be asked at the forum. Candidates will then be asked to give spontaneous answers to questions that originate with the moderator, their opponents and/or the audience.

### 3. Follow-Up Q&A

In this approach, the moderator and/or panelists ask the candidates questions. To avoid evasive answers to the original question, follow-up questions are permitted. Follow-up questions by opponents force candidates to present exact answers.

#### 4. Discourse Debate

The moderator asks a question, and the candidates discuss the issue. It is imperative to have the moderator control candidates who try to dominate the discussion. A strong, nonpartisan moderator is a must for this forum design.

#### 5. Town Meeting Q&A

Members of the audience ask all questions. Questions should be screened by a staff member of your organization in order to avoid partisan questions and to facilitate substantive dialogue. The audience members asking questions will educate the candidate on the concerns of the constituency.

#### 6. Feedback/Hearings

Focus the forum on issues specific to your organization. For each of these issues, select an expert to present their concerns and suggest solutions. After the expert presentation, the moderator or panelists will ask the candidates to respond with specific program proposals to answer the concerns presented. The candidates will be allowed to make closing remarks after all agenda items have been discussed.

#### 7. Unconventional Candidate Events

As long as you follow the guidelines of nonpartisanship, you need not limit your candidate event to the formats outlined above. Feel free to be creative and do something fun that appeals to your constituency.

#### 8. Adding On Informal Q&A

With any of these options, consider adding an informal question & answer session at the end of the formal proceedings.

## TO-DO LIST ON A DEADLINE

### WITH FOUR MONTHS TO GO

#### 1. Identify other nonprofits in your district who would be good partners in collaborating on a forum

Other nonprofits are critical partners in planning a successful candidate forum. A strong coalition of nonprofits helps entice candidates to attend and ensures a strong audience turnout at your forum. Also, co-sponsoring organizations can help achieve nonpartisanship by ensuring that the forum covers a broad range of issues. Approach potential partner organizations early and be clear about what you are asking them to do.

Co-sponsoring organizations are helpful in several additional ways: logistics, volunteers, name-power, constituents, and more. Gauge the level of involvement from co-sponsor organizations. For example, will the co-sponsors help plan the forum or simply be recognized on press releases? Will they assist in getting their organizational

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membership to attend the forum? Ideally, candidate forums should reach an audience broader than one organization's members and co-sponsorship can help recruit participants. If the co-sponsors choose to be involved in planning, establish a planning committee with representatives from each co-sponsoring organization. Once you have gathered a planning committee, create a big to-do list and assign tasks. Everyone should be responsible for turnout!

## **2. Set date, time, and place for the forum**

The forum should be held during the middle of the week and in the evening to allow ample time for attendees to arrive after work/daytime commitments. It is generally best to start the forum between 6–7:30 p.m. Because so many people rely on public transportation, especially in the larger metro areas, it is important to ensure plenty of time after the work day has finished for everyone to arrive at the event.

Check out community calendars to make sure that there are no competing community events on the evening you are scheduling your forum. Keep in mind that on Fridays most people have their own social plans, so avoid hosting forums on Fridays when possible. Finish on time. Journalists covering the event often prefer earlier end times because of deadline restrictions.

Finally, we'd suggest making the place for the forum centrally located in the district and near a transit line for easy access. Be sure to ask the facility about safety requirements and adhere to them strictly. Make provisions for childcare at the forum and make sure your location is disability accessible.

## **3. Decide on the forum's format**

See Page 3 for more details on format options. Also decide on time limits for each candidate's response; this will depend on how many candidates attend.

## **4. Develop a budget for the forum early and stick to it**

Don't let costs get out of hand.

# **WITH THREE MONTHS TO GO**

## **1. Invite all candidates.**

Send out a letter inviting the candidates. Make a phone call to say the letter is coming. Then make a phone call after the letter has arrived to encourage a response. It is very important to the candidates that forums remain nonpartisan. Therefore, emphasize that as a 501(c)(3) you must ensure the forum is nonpartisan. Also, keep in mind that some candidates might not fully understand the impact nonprofit organizations have in their districts. Therefore, be sure to include this information in the conversations you have and materials you provide to candidates. Maintain contact with candidates throughout the planning process. This helps to ensure they are comfortable with the format and will participate as planned.

## 2. Initiate contact with media.

Make a list of media sources you would like to promote and/or cover the event (newspaper, radio, television — don't forget about small community media sources or non-English language media sources). Contact these media sources. Send both an email and a hard copy of a media advisory which should include date, time, place of the forum and co-sponsoring organizations. Designate a spokesperson to be the media liaison and to follow up with media regularly. This is a good role for communications staff. (For more information on the role of media in planning a candidate forum, see page 12.)

### Quick review to-do list

4 Months:

- Collaborate with other local nonprofits
- Set date, time, and place for the forum
- Decide on the format
- Develop a forum budget and stick to it

3 Months:

- Send invitations to candidates
- Make preliminary media contact

*“... keep in mind that some candidates might not fully understand the impact nonprofit organizations have in their districts. Therefore, be sure to include this information in the conversations you have and materials you provide to candidates.”*

## WITH TWO MONTHS TO GO

### 1. Volunteer recruitment

Your forum planning committee should make a list of volunteer needs both for publicizing and planning prior to the forum and on the day of the event. There are many roles for volunteers (e.g. passing out fliers in advance, set up and tear down of space, greeting audience members, collecting audience questions for Q&A). Be sure to have enough volunteers to comfortably cover all of your needs. Email and call your organization's members and constituents to request volunteers.

### 2. Select a moderator

The moderator should be someone who is well-respected and viewed by the public as politically neutral and nonpartisan. Ideally, the moderator should be someone who lives outside of the voting district. The perceived objectivity of your moderator is crucial to candidates, the media and forum-sponsoring organizations. A journalist is a good



person to choose as the moderator due to their experience with being objective and nonpartisan. It is your job to prepare your moderator well (give them questions in advance if possible, review process and format with them, help them to shape conversations, and do practice runs).

### **3. Follow up with candidates you've invited**

Confirm all candidates' attendance. If you've not heard back from a candidate, contact again. Let them know which other candidates you expect to attend. Remember, you generally need at least two candidates, unless the candidate attending your forum is running unopposed. Request brief bios from candidates to use when introducing them at the forum. Be sure you and your moderator know how to pronounce candidates' names correctly.

### **4. Strategy for turnout**

We can't say it enough: turnout is everything! Sit down with your planning committee and come up with a strategy for getting people to the forum. Each organization should target their own constituents and members. Get support from community leaders who will agree to promote the forum to their community members. Advertise on your organization's website and in community newspapers. Be creative and don't leave any stone unturned!

## **Quick review to-do list**

2 Months:

- Begin volunteer recruitment
- Select a moderator
- Follow up on candidate invites
- Develop a strategy for turnout

## **WITH ONE MONTH TO GO**

### **1. Final confirmation of candidates**

Get a confirmation in writing (email is fine) from each participating candidate. This will allow your organization to go forward with the forum even if a candidate cancels at the last minute. Notify candidates about the format of the forum, the schedule, and other arrangements (e.g., parking, literature table, opportunity for one-on-one contact with voters). Also, if there are foreseeable problems, let the candidates know ahead of time such as if you expect protestors. Failure to share such information might decrease the likelihood that candidates will agree to attend another forum sponsored by your organization.

## 2. Reconfirm site arrangements

Make sure that your reserved site has all of the accommodations you have requested — including set-up instructions for the room, tables, microphones, etc.

## 3. Reconfirm volunteers

Remind volunteers of their duties and reconfirm their attendance.

## 4. Distribute promotional materials

This is a great opportunity to maximize roles for volunteers. Promotional materials should encourage attendance by constituents and might include flyers, mailings within the district and phone calls to important community leaders (e.g., chairperson of neighborhood association).

## 5. Contact media to promote coverage

Follow up with the media contacts you have made. Let them know about any new developments in the forum, including which candidates have committed to attend. Ask the media source to promote the event in a community events calendar or with a public service announcement. Be prepared to provide promotional materials about your forum and organization upon request.

## 6. Reconfirm moderator

Reconfirm the event with your moderator.

### Quick review to do list

1 Month:

- Final confirmation of candidates
- Reconfirm site arrangements
- Reconfirm volunteers
- Distribute promotional materials
- Contact media again to promote coverage
- Reconfirm moderator

*“Get a confirmation in writing (email is fine) from each participating candidate. This will allow your organization to go forward with the forum even if a candidate cancels at the last minute.”*

### WITH LESS THAN A MONTH TO GO

#### 1. Continue to recruit attendees

Make phone calls, send emails, get local media coverage and knock on doors. Do what ever it takes to ensure turnout. Tailor your message to your organization’s constituents as an opportunity for them to bring forth the issues they care about.

## 2. **Contact volunteers to confirm their duties at the forum**

Remember that you will need some volunteers to be at the forum earlier than others, depending on their duties. Have a staff member in charge of volunteers for the evening to keep the event running smoothly.

## 3. **Final media reminders and press release**

Create a press release to share all information that helps sell your forum as newsworthy to media personnel. For example, if there are questions you have prepared for candidates, share those with media personnel. Follow up with a reminder call one day before the event. Provide media packets that include information on your organization, cosponsoring organizations and candidate information. This should include forum format as well.

## 4. **Write an op-ed piece**

Articulate the importance of informed voting and pitch your forum as a vehicle. This might include issues your organization hopes will be covered at the forum. Be sure to restate the nonpartisan nature of the forum. This should be written by the leader of your organization(s).

## 5. **Select a timekeeper for the event**

This should be a staff person who prioritizes keeping the forum on schedule. When selecting a timekeeper, keep in mind that this person will need to interrupt people in order to keep time. Provide timekeeper color-coded cards during the forum for timing: green card = start, yellow card = 30 seconds remain, red card = stop.

### **Quick review to-do list**

- Continue to recruit attendees
- Contact volunteers to confirm their duties at the forum
- Final media reminders and press release
- Write op-ed piece
- Select a timekeeper

## **ON THE BIG DAY**

### 1. **Complete set-up at forum facility**

Be sure to allow ample time, staff and volunteers for your set-up needs. Bring nameplates for candidates, the moderator and any other important persons at your forum. Don't forget to have a table outside the forum for candidates to distribute materials and for co-sponsoring organizations' materials. Provide plenty of room for media to set up cameras and equipment if you expect them to attend. See page 12 for more info.

## **2. Have volunteers greet audience and candidates**

Have a staff person (or trusted volunteer) assigned to greet and escort each candidate. Identify a point person (typically staff) for volunteers to seek out in case of problems. Have plenty of volunteers to collect audience questions before the event if your format has a Q&A section. Have staff members review the questions for content.

## **3. Set-up a head table**

Set up a table where candidates will speak from during the forum. Include nameplates, a table skirt and microphone(s).

## **4. Welcome and thank-yous**

Typically, this is the moderator's job. Don't forget to thank each candidate, co-sponsoring organization, volunteers, and staff.

## **5. Review the ground rules for the forum**

Again, this is the moderator's role and should include reviewing the forum format your organization has pre-selected (see page 3). Also at this time the moderator should remind the audience of the nonpartisan nature of the event, including that no cheering/shouting will be allowed.

## **6. Informal Q&A period after the forum**

This informal Q&A time after the official forum ends is optional though highly recommended. Even if your forum is formatted to use questions generated by the audience, it is beneficial to provide time after the forum for the audience to ask questions to the candidates informally. Candidates want forums to reach a broad nonpartisan audience. Therefore, they encourage forum sponsors to include Q&A sessions to cover issues that might not arise during the forum.

### **Quick review to-do list**

Day Of:

- Complete set-up at forum
- Have staff or volunteers greet people
- Set up the head table
- Welcome and thank-yous
- Review ground rules for forum
- Make time for informal Q&A after the forum

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# PUBLICIZING YOUR FORUM

1. Promote, promote, promote! Use newsletters, e-mails, phone calls, flyers, public service announcements, op-ed pieces, radio — anything you can think of to generate interest and an audience. Build intrigue whenever possible.
2. Don't forget about new media sources and social networking websites. If there are influential blogs or websites in your area, let them know about your candidate forum. If the blogs are partisan, include bloggers or sites promoting all viewpoints. Depending on your audience, consider posting a notice about your forum on facebook.com. And as always, promote the candidate forum on your website, the website of co-sponsors and in your email communications to constituents.
3. Talk to your local radio station to find out how to get an announcement on the air.
4. Try to personally visit media outlets, especially newspaper editors and editorial boards. This establishes a relationship and will allow you to set up a media “liaison.” Provide regular media updates to this person.
5. Consider asking a local anchor/reporter to facilitate the forum. This strategy could improve chances for media converge, but it would also generate the potential for piquing any existing rivalry issues between local media groups.
6. Make sure there is adequate space for the media — a place for cameras, designated press section, and a place for interviews. Also provide a press packet that includes information about your organization (and cosponsor organizations), information about the candidates, and the rules of the forum. Let the media know you value their participation. Make it as easy for them as possible. Cater to their planning, deadline, and technological needs.
7. You have the benefit of being nonpartisan and this is a selling point to get the media on board. They want to provide objective coverage of the facts and a forum is an ideal format. Make sure you are explicit to the media about your nonpartisanship and how that is good for them.
8. Frame your forum as a “community event” — one that brings citizens together for the purpose of creating public value. You are providing information so voters can engage in the democratic process and influence their government.
9. Consider getting at least one other well-known nonpartisan sponsor like a school, League of Women Voters, or another well-respected organizations in your district as potential co-sponsors. This can go a long way in attracting candidates and media. Chambers of commerce, special interest groups, other elected officials, and religious organizations are usually interested in motivating their members to vote. If they are included in promotion you will reach a broader audience.

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# A FEW MORE DOS AND DON'TS!

## WHAT NOT TO DO IN PLANNING A FORUM

1. Start planning late.
2. Assume the public will attend.
3. Send press releases without personal follow-up.
4. Assume the press will attend without multiple incentives and “new news” to cover.
5. Ignore community, neighborhood, or non-English language publications.
6. Ignore local radio talk shows or media with natural constituencies.
7. Let the planning group think the promotion committee members don't need to attend the early planning sessions. (Promotion is an important part of the planning process.)
8. Forget signs on buildings so people know where the forum is taking place.
9. Forget that people need instruction about what will occur at the forum. (Who asks questions, how long answers can be, when does the audience participate and how — written questions, oral questions etc.).
10. Confuse the audience by keeping them in the dark regarding the process or format of the forum.

## LOOKING FOR SOME HELP FINDING CO-SPONSORS?

1. Other agencies and nonprofits in your neighborhood — or relevant to your target constituency.
2. Nonpartisan organizations, such as the League of Women Voters.
3. Civics or political science high school and college teachers or professors.
4. Issue groups such as arts, environment, human services, youth, immigrants, etc.
5. Local churches, synagogues, mosques or other faith communities — many have social justice, peace and outreach committees.
6. Local businesses.

“Consider getting at least one other well-known nonpartisan sponsor like a school or League of Women Voters or another well-respected organizations in your district as potential co-sponsors.”

# YOUR QUICK FORUM TO-DO LIST

## BEFORE THE EVENT

### 4 MONTHS:

- o Collaborate with other local nonprofits
- o Set date, time, and place for the forum
- o Decide on a forum format
- o Develop a forum budget and stick to it

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### **3 MONTHS:**

- o Send invitations to candidates
- o Make preliminary media contact

### **2 MONTHS:**

- o Begin volunteer recruitment
- o Select a moderator
- o Follow up on candidate invites
- o Develop a strategy for turnout

### **1 MONTH:**

- o Final confirmation of candidates
- o Reconfirm site arrangements
- o Reconfirm volunteers
- o Distribute promotional materials
- o Contact media again to promote coverage
- o Reconfirm volunteers

### **LESS THAN 1 MONTH:**

- o Continue to recruit attendees
- o Contact volunteers to confirm their duties at the forum
- o Final media reminders and press release
- o Write op-ed piece
- o Select a timekeeper

### **ON THE BIG DAY:**

- o Complete set-up at forum
- o Have staff or volunteers greet people
- o Set up the head table
- o Welcome and thank-yous
- o Review ground rules for forum
- o Make time for informal Q&A after the forum

### **AFTER THE EVENT**

- o Send thank-you letters
- o Encourage/monitor news stories
- o Write letters to editor or op-ed piece

## OTHER RESOURCES

### **Bolder Advocacy**

[www.bolderadvocacy.org](http://www.bolderadvocacy.org)

Offers webinars, trainings and publications on what nonprofits can do in regards to advocacy, lobbying and electoral participation. They cover issues for 501(c)(3) public charities as well as 501(c)(4)s and political organizations.

### **League of Women Voters**

[www.lwv.org](http://www.lwv.org)

Offers links to nonpartisan voter guides and voter education resources through local and state chapters across the country.

## OTHER NONPROFIT VOTE PUBLICATIONS

[www.nonprofitvote.org/candidate-engagement/](http://www.nonprofitvote.org/candidate-engagement/)

### **Nonprofits, Voting and Elections: A Guide for 501(c)(3) Organizations on nonpartisan voter participation and education**

A guide to what a 501(c)(3)s can do in the area of voter education and voter participation. It highlights the top ten most common activities for a charity from voter registration to helping voters find their polls and other assistance on Election Day.

### ***Nonprofit VOTE Checklists, Factsheets, and Webinars***

Candidate Forum Checklist

Candidate Appearances at Your Nonprofit Factsheet

Working with Candidates on a Nonpartisan Basis Factsheet

Candidate Engagement: Forums and Appearances Webinar

What Nonprofit Staff Can Do Factsheet

What Nonprofit Staff Can Do Webinar