

# HOSTING A CANDIDATE FORUM

A Step-by-Step Nonprofit's Guide to Planning,  
Publicizing and Hosting a Candidate Forum



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# HOSTING A CANDIDATE FORUM

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Nonprofit VOTE partners with America's nonprofits to help the people they serve participate and vote. It is the largest source of nonpartisan resources to help nonprofits integrate voter and candidate engagement into their ongoing activities.

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# HOSTING A CANDIDATE FORUM

## Introduction

A candidate event or forum is a great way to engage your community around an upcoming election. Because nonprofits are nonpartisan and rooted in local communities, they are well positioned to sponsor forums and increase public understanding of the election process and the candidates running.



A candidate forum is also a powerful tool to advance the public policy goals of your nonprofit. Whether

your organization needs support for an issue, wants to change state law, or simply wants to increase awareness of your issues or constituency, a successful candidate forum during an election year will build awareness of and greater recognition for 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 guideposts set out in this



publication, and by carefully developing plans and executing them, any nonprofit should be able to achieve its goal of successfully hosting a candidate forum.



## Keeping Your Forum Nonpartisan



When planning your nonprofit candidate forum, remember – nonpartisanship is your friend! Not only is it required for 501(c)(3) organizations, it encourages attendance by candidates, attracts more interest from the media, and is an effective tool for engaging your community around the issues that matter to them.

### Basic Guidelines for Staying Nonpartisan

- The forum should cover a broad range of issues.
- Candidates should have equal time to present their views.
- The candidates are asked about issues, but not asked to pledge to or agree with specific positions of the sponsoring organizations.

- The moderator stays neutral and does not imply approval or disapproval of the candidates.

Staying nonpartisan is fairly straightforward. Here are some tried and true tips from the experts:

### Inviting the Candidates

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.

#### *Q: What about a race with several candidates?*

At least two candidates must attend to be a forum. You may want to ensure the front runners can attend, but having any two or more is enough to make it a nonpartisan.

#### *Q: What about a last minute cancellation?*

If it is a two-candidate race and one cancels with very little notice, or worse, doesn't show up, you may cancel or go forward with the candidate event as planned. If you go forward, make sure to announce that this in no way signifies the endorsement of the attending candidate by your organization.

# HOSTING A CANDIDATE FORUM

## Keeping Your Forum Nonpartisan



### Questions Asked at Forum

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 ask good and even pointed questions, but not that signal a strong bias for or against a candidate. It's ok to ask straightforward questions on the issues, but balance these across partisan lines.

### Ground Rules Inside the Forum

*Partisan Attire:* While not required, you may want to ask audience members to check their partisan materials (including buttons and signs) at the door. This helps to create a sense of nonpartisanship within the forum hall.

*The Audience:* 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 strong political advocacy for any issue.

### Literature

You may provide nonpartisan voter education, 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.

## What the Candidates Want

It is helpful to understand 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, as 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

Allow 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. Many candidates and elected officials already rely on nonprofits as resources for policy information.



## Selecting a Format

### Your First Step in Planning a Forum

At the top of 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.

### Common Formats

#### 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. Follow-Up Q&A

In this approach, the moderator and/or panelists ask the candidates questions. To get clarifications and more specific answers, follow-up questions are permitted.



#### 3. 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.

### Other Options

#### 4. 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.

#### 5. 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. One innovative nonprofit candidate event included karaoke with the candidates. (This took place at a bar. Each candidate sang a song, followed by 3-5 minutes to address the audience.)

# HOSTING A CANDIDATE FORUM

## Your Quick Forum To-do List

### 4 MONTHS TO GO:

- Identify other organizations as partners or co-sponsors
- Set date, time, and place for the forum
- Decide on a forum format
- Develop a forum budget

### 3 MONTHS TO GO:

- Invite the candidates. Find the best contact to confirm and brief them
- Send invitations and do follow up
- Create a communications plan

### 2 MONTHS TO GO:

- Create and start a plan for turnout
- Begin volunteer recruitment
- Select a moderator
- Start publicity
- Continue follow up with candidates

### 1 MONTH TO GO:

- Final confirmation of candidates
- Reconfirm site arrangements
- Reconfirm volunteers
- Continue outreach and publicity
- Reconfirm moderator

### LESS THAN 1 MONTH:

- Build your audience! Continue to recruit attendees
- Contact volunteers to confirm their duties at the forum
- Ramp up communications
- Finalize forum logistics
- Select a timekeeper

### DAY OF THE EVENT:

- Complete set-up at forum
- Have staff or volunteers greet people
- Set up the head table
- Review ground rules for forum
- Make sure your name is prominent for photos and video
- Have a sign-in list for names, emails or phone numbers
- Allow time for informal mixing after the forum

### AFTER THE EVENT

- Send thank-yous to candidates, the moderator and co-sponsors
- Follow up with coverage and highlights to your allies and audience



## With Four Months To Go

### 1. Identify Other Nonprofits or Conveners as Co-sponsors or Partners

Other organizations can be critical partners in planning a successful candidate forum. While one or two organizations take the lead, co-sponsors help entice candidates to attend and ensure a strong audience turnout at your forum. Also, co-sponsoring organizations can help achieve broader nonpartisanship.

Co-sponsoring organizations are helpful in several other ways — logistics, volunteers, name recognition, and more. Gauge the potential level of involvement from sponsoring organizations. For example, will the co-sponsors help plan the forum or simply help build your audience?

### 2. Set Date, Time, and Place for the Forum

Forums should generally be held during the middle of the week and in the evening; however, some have made day times work as well. Because many people rely on public transportation, especially in larger, urban areas, it is important to ensure plenty of time for everyone to arrive at the event.

Check to see if there are competing community events on the evening you are scheduling your forum. Finally, choose a central location for the forum near public transit or with ample parking. Make sure your location is disability accessible.

### 3. Decide on the Forum's Format

See page six for format options. Depending on the format, 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

Consider your costs for space or audio-visual needs.

#### 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

## With Three Months To Go

### 1. Invite All Candidates

Contact the candidates and key staff by email and phone. Securing their participation takes persistent outreach. Follow up with texts and more emails and calls. It is important to the candidates that forums be nonpartisan and neutral.

Emphasize your status as a 501(c)(3) nonpartisan organization and experience doing forums. As candidates may be unfamiliar with your work, highlight its reach and impact. Maintain contact with candidates and or their staff throughout the planning process. This helps to ensure they are comfortable with the format and will participate as planned.

### 2. Create a Media Plan

Make a list of all media sources (online, print, radio, etc.) you would like to promote or cover the event. Also a list of partners who can promote the event through their communications. Candidates should help with publicity as well. *For more information on the role of media in planning a candidate forum, see page 15.*

### Quick-review to-do list

#### 3 MONTHS:

- Identify the scheduler or best contact at each candidate's campaign office
- Invite the candidates. (You may have to adjust date as needed.)
- Develop your media/communications plan



## With Two Months To Go

### 1. Strategy for Turnout

We can't say it enough – turnout is everything! Connect with your planning committee and make a strong plan for getting people to the forum. All participating organizations should target their own constituents and members. If you're the lead organization, you'll likely do the most on turnout.

### 2. Volunteer Recruitment

Make a list of volunteer needs leading up to the forum and for the day of the event. There are many roles for volunteers – promoting the event, setting up/cleaning up, greeting audience members, collecting audience questions for Q&A. Recruit enough volunteers to cover all of your needs.

### 3. Select a Moderator

The moderator should be someone who is well-respected and viewed by the public as politically neutral and nonpartisan. The perceived objectivity of your moderator is important to candidates, the media and forum-sponsoring organizations.

A journalist or a board member experienced in being objective and nonpartisan can be good option.

Prepare your moderator well by going over questions in advance and reviewing process and format.

### 4. Start Publicity

Make your initial contacts and communications with media outlets. Activate your partners to do the same.

### 5. Follow up With Candidates You've Invited

Confirm all candidates' attendance. If you've not heard back from a candidate, make contact again. Let each candidate know who else you expect to attend. Remember you need at least two candidates attending.

#### Quick-review to-do list

#### 2 MONTHS:

- Develop a strategy for turnout
- Begin volunteer recruitment
- Select a moderator
- Start publicity
- Follow up on candidate invites
- Request brief bios



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## With One Month To Go

### 1. Final Confirmation of Candidates

Get a final confirmation from each participating candidate. Be sure to notify the candidates about the format of the forum, the schedule, and other arrangements – e.g. parking, literature table, and any opportunities to meet voters before or after the forum.

### 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. Continue Outreach and Publicity

### 5. Reconfirm and Prepare Moderator

### Quick-review to-do list

#### 1 MONTH:

- Final confirmation of candidates
- Reconfirm site arrangements
- Reconfirm volunteers
- Continue outreach and publicity
- Reconfirm moderator



## With Less Than A Month To Go

### 1. Continue to Recruit Attendees

Try to get personal confirmations by making phone calls and re-sending emails. Ask partners to report back on their outreach. Tailor your message to your organization's constituents as an opportunity for them to raise issues they care about and ensure candidates take notice of the interests of your community.

### 2. Confirm Volunteers and Their Duties at the Forum

To keep the event running smoothly, have a staff member in charge of volunteers for the evening.

### 3. Final Media Reminders, Posts and Media Release

Create a media release to share all information that helps sell your forum as newsworthy. Highlight candidate participation. Location, and topics to be highlighted. Follow up with a reminder call one day before the event.

### 4. Address Forum Logistics

Prepare for arrival of candidates, moderator and key personnel. Prepare hall, audio-visual equipment, etc.

### 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 may need to interrupt people in order to keep time. For example, provide timekeeper color-coded cards to use during the forum for timing: green card = start, yellow card = 30 seconds remain, red card = stop.

### Quick-review to-do list

#### LESS THAN A MONTH:

- Continue to recruit attendees
- Contact volunteers to confirm their duties at the forum
- Send final media reminders and press release
- Finalize forum logistics
- Select a timekeeper

# HOSTING A CANDIDATE FORUM

## Day of The Event



### 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.

### 2. Have Staff or 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 consult in case of problems. You may want to collect audience questions before the day of the forum, depending on the format of your event. Have staff review the questions for priority and content.

### 3. Setup a Head Table

(With Your Name or Logo(s) Prominent)

- Setup a table for candidates to speak from during the forum.
- Include nameplates, table skirt and microphone(s). Make sure your name or banner stands out for visual recording.

*Continued Next Page*



## Day of The Event

### *Day of The Event Continued*

#### **4. Welcome, Thank Participants and Review the Ground Rules for the Forum**

This is the moderator's role and should include reviewing the forum format your organization has selected. The moderator reminds the audience of the nonpartisan nature of the event, including that no cheering/jeering or excessive applause will be allowed.

#### **5. Informal Q&A Period After the Forum**

An informal Q&A time after the official forum ends is optional, though highly recommended. Encourage candidates to stay and meet voters. This allows candidates to informally address issues that might not surface during the forum.

#### **6. Circulate a Sign-in List at Forum** (Optional)

Pass around a sheet to get names and emails for follow up and election reminders.

### Quick-review to-do list

#### DAY OF:

- Complete set-up at forum
- Have staff or volunteers greet people
- Set up the head table
- Review ground rules for forum
- Make time for informal mixing after the forum
- Optional sign-in list of names, emails or phone numbers



# HOSTING A CANDIDATE FORUM

## Publicizing Your Forum

- 1. Promote, promote, promote!** Use all your communication channels. Target and time your online and print to maximize impact.
- 2. Leverage partners and media outlets** that have featured your work in the past.
- 3. Use key election dates or campaign news** to drive communications in the lead-up to the forum.
- 4. Try to personally visit contact** media outlets. Use this to establish new relationships and raise your profile.
- 5. Use a known moderator** to draw additional attention.
- 6. Your nonpartisanship is an advantage.** For media and your audience, a forum is a chance to hear from candidates in a nonpartisan setting rather than hear stock messages from the campaign trail.
- 7. Frame your forum as a “community event”** – one that brings voters and residents together to engage in the democratic process and influence their government.

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**HOLLYWOOD**

## What Not To Do In Planning a Forum

1. Start planning late.
2. Make assumptions about turnout.
3. Over rely on partners and co-sponsors for audience turnout without verifying their effort. (Some may be sponsors in name only which in itself can help.)
4. Send media releases without personal follow-up.
5. Not take advantage of media outlets in other languages common to your community.
6. Forget good signage around the building so people know where the forum is.
7. Leave out instructions to your audience at the start about what will occur – who asks questions, when the audience participates and how, expected decorum, etc.

### MORE RESOURCES

**VOTER ENGAGEMENT**



**RESOURCE LIBRARY**

Explore the full set of candidate engagement resources from Nonprofit VOTE and its partners in our online library of election resources at:

[www.nonprofitvote.org/resource-library/candidate-engagement-2/](http://www.nonprofitvote.org/resource-library/candidate-engagement-2/)

It includes the additional resources of Bolder Advocacy, a program of the Alliance for Justice that promotes active engagement in democracy, issue advocacy, and elections.