



Guide to Hosting a Successful Candidate Forum for 501(c)(3)s

Why would I want to host a candidate forum?

Hosting a candidate forum is an opportunity to bring important topics to the forefront of a local or state election. These forums are a great way to engage the community, stakeholders, and candidates in a discussion about the need and importance of your issue. As a nonprofit organization, you can hold a nonpartisan candidate forum!

What are the elements of successful candidate forums?



How to Use this Guide to Organize Candidate Forums

This guide contains:

10 Steps to Hosting a Successful Candidate Forum	2
Supporting Documents.....	3-15
Reference Guide for Steps to Hosting a Successful Candidate Forum	3
Timeline	4
Best Practices.....	5
Candidate Forum FAQ.....	6-15
Logistics.....	7
Collaboration	9
Interacting with Candidates	9
Determining Questions for the Forum	10
The Moderator	12
Dealing with Unexpected Problems	13-14
Keeping the Conversation Going	13
The Media.....	13

www.advocacyandcommunication.org

For more information about ACS, please contact us at info@advocacyandcommunication.org. Follow us on [LinkedIn](#).

Cleveland
1277 West 104th St.
Cleveland, OH 44102

Columbus
2612 Zollinger Road
Columbus, OH 43221

Washington, DC
300 New Jersey Avenue, NW
Suite 900, PMB 9005
Washington, DC 20001

Phoenix
207 North Gilbert Road
Suite 007
Phoenix, AZ 85234

10 Steps To Hosting a Successful Candidate Forum

Step 1 Content and Structure

Content: _____

Rules: _____

Structure: _____

Audience: _____

Step 2 Choosing Candidates, a Moderator, and Collaborators

Candidates to invite: _____

Moderator: _____

Back-up moderator: _____

Collaborator: _____

Step 3 Determine Potential Dates

Potential dates: _____

Step 4 Finalize Date, Time, and Location

Date: _____

Time: _____

Location: _____

Step 5 Invite Participants

Invitation to candidates _____

Invitation to other participants _____

Step 6 Recruit Volunteers

Volunteers: _____

Step 7 Promote the Forum

Promotion vehicles: _____

Step 8 Determine Set Up, Volunteer Tasks, and Day-of Logistics.

Determine set up: _____

Volunteer tasks: _____

Day-of logistics: _____

Step 9 Host a Successful Forum!

Day-of needs: _____

Step 10 Follow Up After the Forum

Participant follow up: _____

Media follow up: _____



Advocacy &
Communication
SOLUTIONS

Guide to Hosting a Successful Candidate Forum for 501(c)(3)s

Visit www.advocacyandcommunication.org or email
info@advocacyandcommunication.org for more information. Follow us on [LinkedIn](#).

©2022 Advocacy & Communication Solutions, LLC

Reference Guide for Steps to Hosting a Successful Candidate Forum

Step 1 Content and Structure

Understand what rules you must follow as a nonprofit organization (included in the candidate forum [FAQ](#)). What are the questions you will ask candidates at the event? What is your budget for this event? What format is best for this forum (panel, town hall, debate, etc.)? What rules need to be set in place for participants? Who do you want to attend your event? How will audience members interact/ask questions to participants?

Step 2 Choosing Candidates, a Moderator, and Collaborators

Are there other organizations or entities that you should partner with on this forum? What is the role of each collaborator at the forum? Who will moderate the forum? Which candidates are invited to the forum?

Step 3 Determine Potential Dates

Before the date and time of the forum are confirmed, it is important to check with the campaign staff to make sure no other major speaking events are already scheduled for the time you are considering. Be sure to follow protocol for contacting candidates (see [FAQ](#)).

Step 4 Finalize Date, Time, and Location

Once you know that no major conflicts exist for the candidates, it is time to set the date, time, and location for the forum. See [FAQ](#) section for tips on choosing the right location!

Step 5 Invite Participants

Send a formal invitation to the moderator and all of the participants, and ask for an RSVP. See [FAQ](#) section for how to brief the candidates for the forum and details to include in your invitations.

Step 6 Recruit Volunteers

Make sure you have enough people to staff your forum (Set up, break down, sign-in, etc.). If you need to reach outside of your organization for volunteers, it is important to do so well in advance of the event!

Step 7 Promote the Forum

Use your organization's existing resources to promote your event via social media, newsletters, online, and to the media. Consider who you would like to attend your event, and use outlets that will reach this audience. See the [FAQ](#) section for tips on reaching out to the media.

Step 8 Determine Set Up, Volunteer Tasks, and Day-of Logistics.

Make sure you have all of the logistics for the day-of the event set up. This includes confirming attendance, writing talking points for the moderator to welcome/introduce the candidates and the rules of the forum, technology needs, water for the participants, room set up with a seating area for participants and the audience, and any additional sign-in or set up that is needed.

Step 9 Host a Successful Forum!

You spent all this time planning, now the day of the event is finally here! Be sure to follow up with media to confirm attendance, have a press release prepared to give media at the event, arrive at the location early to make sure everything is set up properly and make any last minute adjustments as necessary. Be sure to greet audience and candidates, provide head table for candidates/moderator, welcome audience, introduce candidates, review rules of forum, and hold Q & A after forum.

Step 10 Follow Up After the Forum

Send all of the participants (candidates, collaborators, moderator, volunteers, etc.) a thank you note. Write an op-ed for the newspaper, and keep the conversation going among stakeholders and the community by posting on social media!

Timeline



- Read the [FAQ](#) document in this toolkit!
- Start planning as early as possible.
- Consider co-hosting with at least one other well-known nonprofit organization with a similar mission.
- **Brief the candidates before the event.** It is important for the candidates to know what to expect before, during, and after the event. When you invite candidates, let them know how the event will be formatted, when they can expect to see the questions that will be asked during the event, when they should arrive, how long the event will be, if media will be invited, and what your expectations are of them are during the event. Candidates may have specific requests for the event in terms of content and format (questions, seating arrangements, invitees, etc.); briefing the candidates will help you gauge what their expectations are as well as determine if you are able to incorporate their requests into the event.
- **Be sure to identify staff/volunteers and define roles well in advance of the event. There should be designated individuals to do all of the following:**
 - Greet candidates and guests;
 - Take care of any technology issues that occur;
 - Brief candidates and answer any questions they have before the event;
 - Collect/Facilitate questions from the audience;
 - Greet the media and give them press kits or press releases; and
 - Act as an event manager to oversee the event and take care of any issues that arise.
- **Event promotion is extremely important.** Candidates want to have a large crowd at the event, and it is important to not assume the public will just show up. Determine who you want to attend, and reach out to them through social media, email communications, printed newspapers, printed community newspapers, posters, banners, and other media. Create an invitation through email or social media with an RSVP function so you can gauge and plan for how many people will be attending the event.
- **It is important to understand that sending out a press release does not ensure attendance by the media.** When you communicate with the media, you should send a media advisory to let them know the event is taking place, call each outlet and ask if a representative is coming, and be sure to provide them with at least a press release at the event that highlights the “newsworthy” components of the event.
- **On the day of the event, make sure to post signs on the building with directions guiding people to the event location.**
- **Be sure to keep your potential audience informed about the event.** When you promote the event, make sure that the audience is told what will occur at the event (who will be asking questions, how long candidates will be speaking, how the audience can participate, etc.).
- **Provide refreshments (beverage and snacks) at the event.**



Candidate Forum FAQ

Use this FAQ to answer questions you have related to 501(c)(3) rules, logistics for planning and holding the event, collaborating with other organizations, interacting with candidates, determining forum questions, choosing and preparing the moderator, dealing with unexpected problems, keeping the conversation going after the event, and interacting with the media.

501(c)(3) Rules

1 —————>

As a 501(c)(3), what are the rules I must follow when organizing and conducting a candidate forum?

Generally, a 501(c)(3) organization may conduct nonpartisan candidate forums, but they must follow the federal and state laws related to electoral advocacy. Below is guidance on what a 501(c)(3) organization may and may not do.

The following are things you can and cannot do as part of your candidate forum.

For a complete listing please see the [Do's and Don'ts of Electoral Advocacy tool](#).

Things you CAN do:

- ✓ Sponsor nonpartisan candidate forums or debates subject to limits on lobbying.
- ✓ Distribute nonpartisan questionnaires to candidates.
- ✓ Distribute nonpartisan materials on ballot measures.
- ✓ Distribute nonpartisan materials regarding all candidates or regarding election process.
- ✓ Provide attendees with election information (early and Election Day voting locations, hours, and identification materials they will need).
- ✓ Encourage attendees to vote early or on Election Day.

Things you can NOT do:

- ✗ Recommend, endorse, or suggest that one candidate is better than another.
- ✗ Rate candidates on their support for specific issues (through a report card, rating card, etc.).
- ✗ Publicize which candidates share the nonprofit's views.
- ✗ Say positive or derogatory things about a candidate at nonprofit events (e.g., board meeting) or in nonprofit publications.
- ✗ Ask a candidate to pledge support for a cause.
- ✗ Compare and contrast candidate's responses to your organization's views.
- ✗ Tell attendees which candidates support child care and education.
- ✗ Tell attendees which party to register under or which candidate to vote for.
- ✗ Plan activities with a single candidate, campaign, or political party.
- ✗ Give money or volunteer time to a candidate.

2

How do I know that the candidate forum is the right event to meet my goals?

Before your organization commits time and resources to holding a candidate forum, it is important to make sure that a candidate forum meets the goals of your electoral advocacy effort. The purposes of a candidate forum are to provide local/county/region voters with an opportunity to learn about and compare candidate positions on public issues in a neutral setting. Candidate forums provide candidates with an opportunity to make voters aware of their positions on issues in an educational, multi-partisan format. If your goal is to raise public awareness about candidates' positions on your issues or to get candidates to start publicly engaging in conversations about their positions on your issues, a candidate forum is the right event to hold. Candidate forums are not a forum for the audience to recommend action to the candidates. They should, however, allow voters to express their concerns about issues of importance to them and to solicit suggestions from the candidates for solutions to problems.

3

What should I consider when choosing a location for my forum?

It is important to make sure that the location of the candidate forum is accessible to the public and your audience. Holding the forum in a central location with plenty of parking is important. Make sure the location can meet the technology needs of the event, has enough space to hold the expected number of attendees, a defined area where seating for the candidates and moderator can be set up, an extra room that candidates can use before or after the event, and is in a place that is open to the public. It is worthwhile considering a setting that is relevant to your issue, like a community center or school district board room.

4

How do I determine the rules for the candidate forum?

It is important to set guidelines and ground rules for the candidate forum. Both candidates and attendees should know the rules and what to expect during the forum. Rules should include the format for audience questioning, amount of time allowed for candidates' responses, topics of questions, whether candidates can make opening and closing statements and how much time they are allotted for each, candidate order for statements and answers to questions, the guidelines for prohibiting campaign literature distribution in the forum room, and if the forum will be/can be videotaped for replay on cable TV or displayed on a website.

5

How should the room be set up?

Seating for candidates should be in the form of a head table, preferably elevated so they are visible to the audience. Seating assignments should be done by lottery with each candidate drawing a seat number prior to the beginning of the forum. The table should also be draped and water provided for candidates and the moderator. As the forum facilitator, the moderator may either stand at a podium or be seated at the table with the candidates. If the former, the moderator should be provided with a chair. If the latter, the moderator must be seated in a location that allows for eye contact with all candidates and control over the forum process and decorum. Provide an adequate sound system with microphones available to rotate among the candidates, with a separate microphone

Continued on next page

6

for the moderator. Provide tables for any refreshments and for any literature pertaining to the forum, such as agendas, programs, and packets of candidates' biographies. If you are collecting written questions from the audience, provide a table toward the front of the room for a volunteer to sort the questions and give them to the moderator. Timekeepers should be located in the middle of the front row and visible to all candidates. Make sure there is enough seating for your expected audience.

Who should participate in the forum?

- ✓ **Candidates**—Contact campaign staff in an effort to confirm another event is not taking place prior to finalizing the date, and send out personal letters inviting candidates at least 8 weeks prior to holding the forum. Emphasize that this is a nonpartisan event hosted by your organization. Include information about the impact of early learning, the role of yours and other organizations hosting the event, and contact information. Follow up with candidates at least every two weeks after sending the invitation using different methods of contact (phone, face-to-face, email).
- ✓ **Moderator**—It is important that an experienced moderator facilitate the discussion. Identify the best person to moderate this event, extend your request, and gain commitment as soon as possible. Prepare the moderator in advance (opening talking points, introductions for candidates, questions) and offer to facilitate practice runs or review talking points, etc. prior to the event.
- ✓ **Timekeeper**—Identify one person whose job it will be to keep the forum on schedule. This can either be the moderator, or another that can enforce any predetermined time limits on candidate responses, and if needed, interrupt people in order to keep time.

7

- ✓ **Audience**—It is important that the audience has a way to ask questions to the candidates.

What format should I hold my forum in?

- **Basic candidate forum format**—A basic format is short individual speeches of two to five minutes followed by questions from the audience, usually with one to two minutes for a closing speech by each candidate.
- **Panel and moderator**—Questions for candidates can be asked by a moderator, a panel of stakeholders or from the audience. You can also combine these elements. For example, have a moderator or panel lead off the questioning and then open it up to the audience. You need not ask each candidate the same set of questions, but be sure to give them equal amounts of time to respond.
- **Debate**—For a more debate-style format, send the candidates questions prior to the event that elicit specific responses. Candidates can answer these questions and then move on to those that arise from the audience and moderator during the debate. A debate is particularly good when there are fewer candidates.
- **Town hall meeting**—Organize your event as a town hall meeting if only one candidate has agreed to attend. Members of the audience ask questions and educate the candidate about your issues while also giving the candidate a chance to state opinions and policy proposals on the issues.



Collaboration

8

Should I collaborate with other organizations?

Yes. Collaborating with another well-known organization that has an interest in your issues can certainly help increase the likelihood that candidates will attend, increase the reach of informing and inviting the audience, and making planning and event coordination easier!

9

What should the role of collaborating organizations be before and during the forum?

When you decide to collaborate with another organization, it is important to outline the role of each organization as it relates to planning, attending, and participating in the event. Talk with the collaborating organization prior to agreeing to collaborate to ensure that roles are clearly defined about who will be leading, who will be doing what work, and the expectations of all organizations involved.

10

Are there additional rules I need to follow if the collaborating organization is not a 501(c)(3)?

Depending on the type of organization you are collaborating with, there may be additional guidelines you must follow. For more information on these rules please see the Do's and Don'ts of Electoral Advocacy tool.

Interacting with Candidates

11

What should I tell candidates when I invite them?

In addition to the date, time, and location of the event, it is important that the invitation also informs candidates about who else is invited, what format to expect, what questions the moderator will be asking, whether or not the audience will be asking questions and the format of audience questions, what time the event will start, what time candidates should arrive, contact person's information, and the rules of the forum. Invitations should also include a request for any information needed from the candidate for promotion of the forum (biography, photo, etc.), and a due date for the candidate to respond. If this information is not finalized before the invitation is sent, be sure to tell candidates when they can expect to receive the information.

12

How do I ensure that candidates agree to participate in the forum?

It is important to know that candidates may not be naturally interested in participating in the forum, and you should never leave a candidate's attendance up to chance. Try and schedule a meeting with the candidates prior to planning the event to engage them in a discussion around your issues, and let them know you are planning on hosting a candidate forum in the near future. When you schedule the forum, invite the candidates and ask people who can influence the candidates to make a phone call to encourage the candidates to participate. Ideally, the person who contacts the candidates to encourage them to participate will have a relationship with the candidates and your organization. This might be a board member, donor, community leader, clergy, or another individual.

13

What is the protocol for communicating with and inviting candidates?

The earlier you make contact with the candidates, the better. Before you finalize the date and time of the event, communicate with a representative from each candidate's campaign to explain the purpose of the event, and ask if the candidate's schedule is currently available during the dates/times being considered. Let the representative know what the event will entail, what topics will be covered, when candidates will be formally invited, and what format the event will follow. Once you send a formal invitation, call and speak with the representative and offer to schedule a meeting to brief the candidate. Be sure to document all attempts at communication, successful or otherwise, and always include all candidates regardless of party affiliation or likelihood of winning an election. As a nonprofit organization, you are required to pursue all of the candidates equally. If you attempt to call and email one candidate three times, you must make the same number attempts to reach other candidates.

14

How do I prepare the candidates for a forum?

It is important to inform candidates about what to expect at the forum and make sure they have the information they need to prepare in advance. If there is a set list of questions that the candidates will be asked, share these questions with the candidates in advance. If the questions will be asked from the audience, make sure the candidates know what topics will be covered and give them examples of questions the audience may ask. If the questions will not be shared with the candidates prior to the forum, make sure that candidates are given an explanation about why the questions are not available in advance.

15

Should I allow candidates to pass out campaign literature at the event?

First and foremost, it is important to check with the location the event will be at to learn about any facility use permit regulations concerning distribution of campaign literature. It is up to your organization whether or not you allow candidates to distribute literature, but note that the opportunity must be offered to all candidates. The materials should be placed on a table outside of the event room and not be made available until the conclusion of the forum to avoid having them brought into the forum room. It is generally a good idea to place a limit on the amount of literature any individual candidate can place on the table to maintain the nonpartisan nature of the overall forum environment.

Determining Questions for the Forum

16

How do I determine the questions to ask at the forum?

Good questions at the start of the meeting can help to focus on issues of importance to the audience. The potential audience can be polled for questions before the candidate meeting, or a committee can prepare the questions to avoid duplications and ensure suitability. These questions could be placed in envelopes, identified only by number. At the candidate forum the candidates can draw a number that determines their order of speaking and the question they will initially be asked.

17



Do I have to share the questions with candidates prior to the forum?

Candidates will want to know the questions before the forum. Your organization must decide whether to test the ability of the candidates to think on their feet or allow them time to develop a topic in depth. The latter method risks their use of a speech writer and of research done by others, but the former creates a risk that candidates may not want to participate in the forum without knowing the questions in advance.

18



Should I allow the audience to ask questions?

Yes. The question and answer period after statements by the candidates can be the most interesting part of the meeting. When there are many candidates, consider cutting the time for opening and closing statements or eliminating statements altogether to preserve time for questions. To preserve time for the candidates to speak and to avoid repetition, written questions are preferred. It is also important to determine whether each candidate will have an opportunity to answer each question from the audience or if questions be directed to a single candidate. Prepare a few questions for the moderator to start the question and answer period so that time will not be lost as the questions are submitted by the audience. Be sure to bring index cards and pens for audience members to write their questions.

19



What is the best way to receive questions from the audience?

There are many formats to facilitate audience questions. If it isn't necessary to screen questions from the audience, consider having an open Q&A session where audience members can ask their questions through a microphone. If there is concern about having the audience ask questions openly, consider a submission process where audience members write down their questions for the moderator to read or a social media format where audience members "tweet" or "text" their questions to a specific number or with a specific hashtag. If you are using social media, be sure to have another method available for audience members to submit their questions just in case an audience member does not have access to the internet during the event. If the questions do need to be screened, make sure that there is a volunteer to screen questions before giving them to the moderator.

20



What are some examples of questions I can ask candidates?

- ✓ What are views on the needs of children in our state and what specific steps would you take to address these needs?
- ✓ What kind of people will you be looking for to fill the positions of Secretary of Education, Director of the Division of Children's and Family Services, etc.?
- ✓ Our state currently ranks in the bottom 10% nationally in the amount we spend on day-care services for low-income residents. What are your plans for addressing this need?
- ✓ What are your views on raising the compensation of child care workers?



21



What are some examples of questions I can NOT ask candidates?

- ✗ Questions that ask the candidate to pledge support for legislation.

Last year, you voted against the needs of working families when you refused to support a specific healthcare bill, which was supported by many other health advocates. Will you pledge to support similar legislation when it is reintroduced in 2004?

- ✗ Technical questions that may trap candidates into a particular viewpoint. These types of questions overly simplifies the complexities in making system changes.

Governor Smith has said he wants to overhaul the current licensing standards for child care centers to make it easier for for-profit entities to enter this market. X organization opposes any effort to weaken these standards. What are your views on this critical question?

- ✗ Questions that ask candidates for support in funding increases.

If elected, will you support an increase of \$5 million in the XX workforce program?

The Moderator

22



How do I choose the best moderator?

Select the right moderator for your event. This should be a person who can serve in a nonpartisan role in the discussion. Ideally, this person is well respected, has moderated political forums before, and can remain politically unbiased during the discussion. A good moderator could be someone from the local media, a community leader, or a leader in your issue's field.

23



What information should I ask the moderator to say at the event?

Aside from asking the questions, the moderator should go over the basic forum guidelines and procedures that were distributed to all candidates, so the audience will also understand them and know what to expect. The moderator must specify the length of time allowed for opening and closing statements, if they are included, and must also specify the amount of time each candidate will be given to respond to each question. The moderator should also describe the order in which questions will be asked (if they will be rotated, or all candidates will answer the same questions, etc.), whether questions from attendees will be permitted, and if so, let the audience know that all questions will be screened for relevance, to avoid duplication, and to assure adherence to the guidelines and ground rules. Have the moderator clarify that if a question is directed to a specific candidate, that all candidates will have an opportunity to answer the question after the specific candidate. Make sure the moderator states that personal questions or attacks on any candidate will not be acknowledged.



Keeping the Conversation Going

24



How do I keep the conversation going after the candidate forum?

There are many ways to keep the conversation going after the event. Be sure to send Thank You letters to all participants. Submit pictures and event descriptions to community newspapers. Talk about the event on social media. Maintain a relationship with the candidates after the forum by following up with their staff, sending them links to good media articles about them, and periodically sending them new research or local information related to your issues.

The Media

25



Why would I want to invite the media?

The media is key to helping your organization keep the conversation going outside of the candidate forum and bringing the issue to the forefront of a political agenda. It is extremely important to invite the media and follow appropriate media protocol for the event.

26



What is the protocol for inviting the media?

Send out a media advisory 5 days prior to the event. Make sure the media advisory includes information on whether the candidates will be available for interviews after the event. Make phone calls to the media the day before or the day of the event. Have a press release and literature on your organization ready to give to the media who attend the event; be sure to put all information in a folder to make it easy for the media to keep track of this information.

Dealing with Unexpected Problems

27



What if one or more candidates cancels their attendance?

If one candidate cancels at the last minute and there are still two or more candidates attending the event and representing different parties, then it is okay to continue the event as planned. If one candidate cancels and that leaves just one participant or party represented at the event, change the format of the event to a town hall meeting, and have the moderator and the audience ask the candidate questions. Be sure to let the candidate who cancelled know that the event will continue and apologize to the audience/media before the event. Immediately update all of the promotional information to reflect the new format/participants.

28



What if no candidates show up to the candidate forum?

It is unlikely that a candidate will not come to the event without cancelling with advance notice. If all candidates cancel their attendance to the event, reschedule the event.

Dealing with Unexpected Problems

29

**What if there isn't a large audience at the event?**

When you initially plan the event, it is important to find 10–15 people in your organization's network to attend the event. This will ensure that you don't have a situation in which there are only 1 or 2 audience members at the forum. If you do not get significant attendance at the event, you can change the structure of the event to be more of an informational discussion. Talk to the candidates about your issue, let them ask you questions, and let the audience who did attend ask the candidates questions.

30

**What are the potential things that can go wrong at the candidate forum, and how do I address these things during the forum?**

No matter how much time you spend planning the perfect candidate forum, it is likely that something will come up unexpectedly at the event that you will have to be prepared to handle with little or no time to plan. Use the table below to help you address some of these issues, but, make sure that you have one or more people at the event that can make decisions about what to do when something comes up.

Unexpected Challenges	Solution
A candidate keeps talking past the time limit	Have the timekeeper or moderator cut the candidate off and say, "I am sorry, but your time limit is up."
The moderator loses control of the conversation	If it is only for a few moments, let it go to see how it plays out. If it gets out of control, step in and ask the moderator to bring the conversation back on track.
The press don't follow the protocol or rules of the forum	Pull the press members aside and ask them about their needs; try and come up with a way to meet their needs within the rules of the event.
An audience member loses control	Ask that audience member to step outside. Once outside, ask the audience member to leave the event. If you have security at the event, ask the security to escort that member out.
A candidate does not follow the rules	Ask that audience member to step outside. Once outside, ask the audience member to leave the event. If you have security at the event, ask the security to escort that member out.
A security issue arises	If there is a security issue that arises during the event contact local authorities immediately. Make sure the candidates and the audience are in a safe space, and do your best to remove the security threat from the forum.
The moderator cancels at the last minute	It is important to always have a backup moderator for your event. If you do not have a backup moderator, make sure there is someone from your organization willing and prepared to moderate the event in case of an emergency.
Something that is not on this list	Make sure that you have someone on hand at the event to solve any unexpected problems that might arise.