

Planning a Candidate Forum

Description

Candidate forums give you a platform that brings together candidates and voters to focus attention on children's issues. You can design your own candidate forum or work with other pro-child community groups in schools, hospitals, churches or PTA's to plan a successful joint project. There are many different formats in which voters have the opportunity to question candidates and candidates have the opportunity to express their views on children's issues. Candidate forums should be open to the media to raise awareness of children's issues. Candidate forums should be open to the media to raise awareness of children's issues and to hold candidates accountable for their positions and campaign promises.

Goals

- To encourage candidates to commit to a children's agenda for which they may be held accountable
- To energize those who attend to become more involved in community action for children
- To follow up with voter registration drives, small group viewings of the forum video tape and other volunteer activities
- To announce future activities at the forum so that interested people can sign up at the close of the event
- To educate voters on the candidates' platforms for children

Steps to Take

SAMPLE FORMATS: Several different formats are described. It is important to select the option that meets the needs of your community. Remember that complex questions allow candidates to avoid answering controversial questions. Make certain questions are concise, clear and focus on a single concept. Do not ask the candidates leading questions that point toward specific responses.

- **Pro and Con Format:** A statement or proposition on an issue is read. Sponsoring organizations and/or candidates may submit several propositions, and the working group selects a sample that is representative of all the issues. Each candidate responds, in either the affirmative or negative, describing his or her propositions and encourages prepared or rehearsed responses. To create some spontaneity, the candidates can question each other.
- **Equal Time Format:** In this format, most often 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 question or may be asked different questions, so long as each is given equal time to present his or her points view.

- **Prepared and Spontaneous Format:** Before the forum, the candidates are presented with several prepared questions constructed to elicit specific, detailed responses. A selection of these questions will be asked at the forum. In addition, candidates will be requested to give spontaneous answers to questions that originate with the panel, their opponents and/or the audience.
- **Follow-up Format:** In this format, the moderator and panelist ask the candidates questions. To avoid evasive answers to the original question, follow-up question are permitted. Follow-up question by opponents force candidates to present exact answers.
- **Equal Opportunity Format:** Questions are presented to all candidates and they can choose to answer, not respond or just comment as to their agreement or disagreement. By their choice, candidates may have differing amounts of time to express their positions.
- **Discourse Format:** A strong nonpartisan moderator is a must for this forum design. The moderator asks a question, and then the candidates discuss the issue. It is imperative to have the moderator control candidates who try to dominate the discussion.
- **Town Meeting Format:** All questions are asked by members of the audience, but questions may be screened to avoid redundancy. To facilitate substantive questioning, invite several experts on different aspects of children's issues to attend the forum. Parents and children asking questions will educate the candidates to the concerns of their constituency.
- **Feedback/Hearing Format:** Focus the forum on the Coalition for America's Children agenda: health, education, safety, and security. For each of these issues, select an expert and a family to present their concerns and suggest solutions. After an expert-family, 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 four agenda items have been discussed.

Planning task force: If you are presently a member of a local or statewide coalition the decision to have a candidate forum will be a joint one and the talents of individual members are already a known commodity. If this is a new collaborative effort, invite several community organizations to a meeting to plan a candidate forum. Request that organizations send the people who will be assigned to work on the forum.

- Share past experiences organizing candidate forums or town meetings.
- Determine the particular race for which the candidates will be invited, the format and the forum's date and place during the first meeting. The "hot" candidates or political offices that are of greatest interest to and have the most

impact on the community will evoke the maximum response from the voting constituency and the media. Select and prioritize alternative dates. Consider other events that are taking place in your community that might either complement or compete with the forum. Discuss various formats and select one as soon as possible. Much of the forum will depend on the format selected.

- Appoint a forum coordinator. Try to select a coordinator during the first meeting.
- The coordinator's responsibilities may include:
 - Developing a time line
 - Facilitating and scheduling steering committee meetings
 - Serving as the liaison to all involved organizations
 - Acting as the steering committee spokesperson for media
 - Maintaining adherence to deadlines
 - Coordinating activities
 - Assisting as other concerns arise
 - Ensuring attention to legal guidelines
 - Documenting and archiving all activities for evaluation and future forums
- Form a working team and organizational structure during the initial planning stage. This will create ownership for everyone who is sponsoring the event. Dividing responsibilities will ensure that the diverse talents of the different players will be best utilized and that the burden of work will be shared.

The following topics and specific tasks require consideration:

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| Facilities | Site selection and written contract Furniture and technical requirements Immediate needs on the day of the event Ease of video taping Accessibility of disabled persons |
| Program | Moderator, panelist, opening and closing speakers Written confirmations/Thank you notes Confirm details of the program Requirements for the day of the event Time keeper |
| Media | Press releases Talk radio, PSA spots, news stories and events calendars, editorial board meetings Personal appointments Commitments for pre/post media coverage of children's issues |

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| Audience | <p>Live broadcast</p> <p>Format/rules for participation</p> <p>Questions to ensure a broad range of issues</p> <p>Invitation to experts to ask substantive questions</p> <p>Volunteer enlistment and training</p> |
| Candidates | <p>Invitations and thank you notes</p> <p>Terms</p> <p>Briefings on the issues</p> <p>Written commitments</p> <p>Candidates' needs the day of the event</p> <p>Rules for candidate materials</p> |
| Research | <p>Definition of issues for discussion</p> <p>Question for candidates</p> <p>Pre-forum issues survey for candidates</p> <p>Audience evaluation of the forum</p> <p>Pamphlet on children's issues/supportive data</p> |
| Finance | <p>Budget</p> <p>Fund raising strategy</p> <p>Financial commitments</p> |
| Outreach | <p>Video distribution in the community</p> |
| Legal | <p>Legal advice from experienced attorney</p> |
| Oversight | <p>Legal approval for candidate selection, format, publications, speakers, etc.</p> |

Site Selection: The selection of the site for the candidate forum can be critical to the success of your event. Selection based on non-political considerations—a neutral forum—is the legal mandate. Some things to consider:

- **Accessibility:** Convenient access for the physically disabled, public transportation and/or parking
- **Size:** Comfortably houses the number of people expected with easy viewing areas for press cameras and audiences.
- **Layout:** A physical arrangement conducive to audience participation
- **Technical requirements:** Adequate electrical capacity, sound system, telephone hook-ups, equipment movement in and out of and around the facility
- **Neutrality:** Constituency base near the site does not appear to favor one candidate over another
- **Donation:** Everything from in-kind contribution of the site to the financial commitment of sponsoring organizations
- **Miscellaneous:** Security, insurance requirements, reception area, rest rooms, furniture, waiting rooms, etc.

Moderator, Panelist: A non-partisan statement of purpose by a neutral spokesperson at the outset and conclusion of the candidate forum is imperative to set the tone for the evening. For legal reason, it is safest if the neutral spokesperson is not directly aligned with sponsoring organizations. This person will present the opening remarks, introduce the moderator and panelist and deliver closing remarks. Avoid personalities that represent allegiance to a particular candidate or political party. The timing procedure should be unobtrusive and efficient. Some forums have available traffic lights—green to talk, yellow to signal one minute left and red to stop speaking.

The Moderator:

- **Responsibilities:** Ensures that the format works fairly for all candidates, manages the time, enhances the discussion, enforces rules, keeps time and copes with the unexpected.
- **Qualifications:** Confidence in front of an audience, audience appeal, knowledge of the issues, acceptability to the candidates, no partisan identification, flexibility, broadcast experience

The Panelists:

- **Responsibilities:** Represent a broad range of points of view, exhibit independence in questioning candidates, know of the issues, adhere to legal guidelines
- **Qualifications:** Confidence in front of an audience, skillfully at posing questions, acceptable to candidates and audience credibility

Media and Audience: The steering committee needs to determine if it will be advantageous to have the candidate forum televised live by commercial, cable or public stations; broadcast on radio; videotaped for small group viewing at a later date; or a combination of these techniques. Your media strategy should reflect your goals for the forum. This will determine the audience you want to reach and the station you may want to enlist to broadcast the forum.

- Televising the forum will reach the greatest number of people but the planning can be complicated by the demands of the station. Also the one station that broadcasts your forum will most likely be the only one to promote it. Copyright laws may limit televising the forum and may limit your videotape format at later showings. Written consent on this issue must be given by the station.
- The media can be enlisted to support the efforts of your coalition by providing public service announcements and print ads advertising the forum. To spark greater public interest in the event, arrange for several talk radio and TV programs featuring various members of the coalition in informative discussion of basic children's issues. This will also educate the public on policy

regarding children's issues and highlight the efforts for children to which your coalition partners are committed.

- When negotiating with a TV station, consider the following items:
 - **Plan:** Approach broadcasters with a tentative proposal that includes the date, location, format, potential moderators and panelists, contents, candidates and other details.
 - **Negotiations:** Know your bottom line requirements and be prepared to compromise on other items.
 - **Program "Self":** Broadcasters are interested in candidate forums because they validate the station's commitment to public service. They will probably be concerned with the following items:
 - Airing date and time
 - Exclusivity
 - Format dynamics
 - On-air personalities
 - Copyright
 - Commercials
- **Restrictions:** Sign a contract that outlines the specifics of the program and any restrictions for either of the parties involved.
- **Approval:** Resolve all conflicts of interest and seek approval from your attorney

To promote the forum in the community consider the following:

- **Logo:** Identification with a logo and slogan will create visibility and a unifying image. Remember that you can use the Coalition's "Who's for Kids" video logo, tagged with your local coalition's name or sponsoring groups.
- **Announcements:** Place announcements in agency publications
- **Fliers:** Place posters, notices and fliers in public places. You can use Coalition posters as attention-getters and tack on announcement
- **Billboards:** Arrange for public service billboards
- **Calendars:** Submit the forum information to 'Calendar of Event' section of print media

Audience and Volunteers: The format will determine the depth of contribution needed from the audience to the forum. It is important for candidates to hear directly from their constituents. Make certain the audience is either permitted to ask questions or is invited to make presentations on children's issues and how their lives are affected by public policies. To ensure adherence to the legal requirements for a 501(C) 3 agency, review the legal section included in this manual. When preparing for audience participation consider the following:

- **Speakers:** Ask co-sponsors to submit names of families and other potential speakers
- **Tickets:** If the seating space is limited you may want to consider tickets or reservations
- **Neutrality:** Promote outreach to a broad-based audience with diverse political perspectives. Avoid the appearance of partisanship. If the invitations are to be limited to specific organizations, the candidates must agree to this restriction in advance and in writing.
- **Questions:** If the audience is to ask questions the night of the debate, have them jot down planned questions and pre-screen them to ensure a broad array of issues and elimination of endorsements of or attacks on candidates, then return the question to the author to ask the question.
- **Volunteers:** Enlist volunteers to be ushers, greeters, and ticket takers, to collect questions (if they are written) and evaluations and to staff literature tables. Under no circumstances should volunteers be allowed to wear campaign

Approaching the Candidates: It is essential that the steering committee develop written criteria for inviting the candidates. If the office you select has several announced candidates, you are required to invite all “viable” candidates of all parties. One standard for deciding who the viable candidates are is all candidates who are above 5 percent in major public opinion polls

- Contact candidates as soon as the tentative date and format have been decided. Send a formal invitation and then meet with the candidates or their staffs, in person, to present the details of the forum. Other items to consider are:
 - **Schedule:** Be as flexible as possible about the date, recognizing that candidates have full schedules during the election season
 - **Negotiations:** To avoid needless negotiations, select a balanced format right from the start, one that protects the interests of all candidates and provides equal opportunity for each to state his or her views
 - **Agreement:** When the details have been agreed upon by all candidates, have all of the principals sign the document. This may seem awkward, but a written agreement from the candidates as to site, format and other participants will avoid most last-minute complaints.
 - **Partisan Literature:** Avoid background material and voting records that describe the positions of the candidates unless all candidates are given an equal chance to provide their own literature.

Documenting the Issues: The moderator and panelist should be given a general outline of the topics you wish to cover during the forum. The topics should be specific to make certain that the candidates have the opportunity to describe their points-of-view or solutions to problems. For example, you might provide the brochure from the Coalition

for America's Children as background with a cover note that outlines your own more localized set of issues and additional levels of detail.

- Many candidate forums have nonpartisan publications on the issues available for members of the audience. It will be helpful to prepare a pamphlet on the state of the child in your community, providing statistics on children's health, education, safety and security. Local statistics can support the position that children are not provided the services they require to grow into healthy, productive adults. Coalition materials, buttons and bumper stickers can be given out.
- Before the forum, a simple candidate questionnaire can be developed and sent to the candidates. The results can be distributed at the forum. A checklist of specific issues with space for notes may help the participants if they want to record the stated positions of the candidates.
- Sponsoring organizations can display nonpartisan literature about their agencies. This will give members of the audience a chance to contact you for assistance, more in-depth information or opportunities to volunteer
- Any written information that will be available should be shared with the panelists, moderator and candidates. Check with your attorney first to make certain there are no legal constraints with any of the literature.
- It is helpful to prepare evaluation surveys for members of the audience and for the steering committee.

Budget

Prepare a budget and financing strategy for the forum. Items to consider are:

- Production Costs
- Advertisements and promotions
- Legal fees
- Publications
- Rental Cost (site, furniture, etc. if necessary)
- Foundation support

Legal Considerations

When engaging an attorney, select someone experienced in nonprofit laws governing 501 (C)(3) agencies, especially those dealing with voter participation activities. Provide the attorney with all letters, written contracts and publications that you develop. When in doubt, ask!

A Summary of Legal Concerns:

- **Non-partisanship:** Remember, you are required to refrain from engaging in partisanship or even the appearance of partisanship
- **Past History:** Sponsoring agencies must have a record of concern with public and legislative issues

- **Invitations:** All viable candidates must be invited. Determine your criteria at the outset of your planning, put it in writing and share it with invited candidates
- **Neutrality:** The location must not be selected for political reasons.
- **Issues:** Center the forum on a broad range of issues that correspond to the agendas of sponsoring organizations
- **Written Agreement as to Equal Opportunity:** All candidates should be given equal time unless the format specifically states that equal time is not guaranteed. The candidates should be aware of the format and document their consent.
- **Questions:** Questions and questioners must be unbiased and nonpartisan
- **Follow-up:** Any reports on the forum must be free from editorial comments on the candidates, endorsements, opposition or criticism.

Timeline

- Determine by the level of the office and the number of candidates seeking the office and the number of offices included in the forum; but allow at least four to six months to plan and implement the forum
- Invite candidates as soon as they announce intentions to seek the office if the forum will be held before the primary election. If the candidate forum will target the general election, invite candidates as soon as you know the winners of the primary election.
- Plan backwards from the dates of the primary or general election.

Evaluation

- The number of invited candidates that participate
- The number of voters that attend the event
- Media coverage of the forum
- Candidates response the children's issues in post-forum campaign literature and campaign appearances
- Audience evaluation forms received at the close of the forum

