A candidate event is a great way to engage your members and your community around an upcoming election to build momentum around issues that matter to your chapter while learning more about candidates and their stances. Because nonprofits must remain neutral, your forum is a vital opportunity to increase public understanding of the democratic process and the issues affecting your community.

A candidate forum can be a powerful tool for achieving public policy goals. Whether your chapter is interested in securing conservation funding, has a goal of changing state law or simply wants to increase issue or constituency awareness, a successful candidate forum during a major election year can build major momentum.

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 this guide to develop plans and execute them, your chapter should be able to achieve its goal of hosting a successful candidate forum.****

**Build A Strong Team**Successful events with a full house – an election year may draw hundreds of attendees – don’t just come together by accident. It takes a strong team of one to two leaders, backed by a committee of volunteers to drive the event forward.

**Do Your Homework**

When planning your chapter candidate forum, remember: nonpartisanship is critical. 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. You will want to have a complete understanding of what this means as your organize your efforts.

**Dot Your i’s and Cross Your t’s**The logistics required to put on a candidate forum can be daunting – and certainly requires an eye for detail. Starting at least three months out – if not earlier - is essential, and keeping close track of all tasks and responsibilities is a must.

**Partner Up**Bringing another nonprofit organization in as a partner to helps broaden your reach and increases the number of volunteers. Organizations such as watershed associations and local green groups are perfect partners and will bring skills and members which you might not have access to.

**Communicate & Advertise**Frame your forum as a “community event” --one that brings citizens together for the purpose of creating public value and no one will want to miss it. You are providing information so voters can engage in the democratic process and influence their government. Inviting the community using a variety of media is essential to draw a crowd which will satisfy the candidates. Be sure you invite people from far beyond your chapter’s email and membership lists.

**Build Community**This is an opportunity to make hundreds of people feel like part of a local community that shares their passion and beliefs. Make sure everyone who walks in the door feels welcome and part of the group.

**Follow Up**

After the event, gather your team together to celebrate your successes, highlight areas for improvement and complete final tasks to build off of your momentum.

 **Build A Strong Team**Your candidate forum team is going to be the group that makes it all work – ensuring you have enough people to help carry the load while being mindful of the types of people and skills you will need, is your first step toward success.

**THE FIVE ESSENTIAL
TEAM MEMBERS**

When building your planning committee, consider seeking out volunteers with the following skills sets:

1. **Head for Logistics**
A detail-oriented person you can task with the nitty-gritty (such as insurance certificates, contract review, etc…)
2. **Relationship Builder**The person on your team who’s a natural at relationships and can draw in partners, attendees and other community support.
3. **Communicator**
Candidate forums require lots of promotion. Choose someone with media and online experience that is ready to work!
4. **Happy Soldier**Every chapter has them – and every event needs them – the volunteer who can be counted on for any task, whether it’s delivering tables to the venue, hanging posters, doing a supply run… Be sure you have a handful of soldiers to call on.
5. **Ringmaster**Accountability and oversight is key to ensure all the pieces are moving together and in the right direction. A consensus-building leader who when it’s time to make a final call can still command authority is the best fit for this important task.
6. **Form a sub-committee-** Hosting an event can be a lot of legwork upfront, so having a dedicated sub-committee of chapter members can help spread the workload and avoid burnout. The first task of the sub-committee is to develop a timeline to ensure all details and requirements are addressed. While some chapters have executed events on timelines as short as a few weeks, it’s best to plan 2-4 months ahead of time, particularly when hosting for the first time, or working with a new venue. For a breakdown of when and how to schedule your planning meetings , see the Weekly Planner in the Appendix.
7. **Organize-** Coming into your event with a volunteer plan and plenty of assistance will help ensure a smooth evening.
	1. **Create a schedule for the evening-** think through the timing of how you want the night to go. Have you identified who will be the evening’s MC, any guest speakers you want to invite to help draw a crowd, how long you’ll allow for intermission, etc.
	2. **Create a volunteer plan-** Plan for additional assistance during the day of the event, during the event as well as breaking down the event. Having your volunteer needs outlined will help your team recruit the right people for the right role.
	3. **Plan for tabling space for your chapter and/or partner groups**- Bring your own tables or ask your venue if they have tables that you can use for displays to communicate your efforts, upcoming volunteer opportunities and new member signups.

**Do Your Homework**

When your chapter chooses to host or co-sponsor a candidate forum to help your community familiarize itself with candidates and where they stand on issues of importance to TU’s cold water conservation mission it is important to understand the rules and regulations in regard to compliance with the Internal Revenue Service (IRS).

TU will continue to engage in advocacy efforts in pursuit of its mission, and doing so will at times will include communication regarding legislators’ positions on issues on which TU has long been working. At all times these activities must be handled in a way that is consistent with IRS rules for 501(c)(3) nonprofits. There are numerous ways to engage legislators and candidates that, if done correctly, are well within the IRS rules. Please consider engaging in these activities in order to advance TU’s cold water conservation mission, but err on the side of caution, and contact Volunteer Operations staff before engaging in any kind of activity that could be construed as attempting to influence an election. For more information, see [page 56 of the TU Leadership Manual](https://www.tu.org/sites/default/files/TU_Leadership_Manual_June_2017.pdf) and this [overview](https://www.tu.org/sites/default/files/Tax_Exemption_Restrictions.pdf).

Review the [IRS Compliance Guide for Tax Exempt Organizations](https://www.irs.gov/pub/irs-pdf/p4221nc.pdf) (page 5).

Candidate forums must be conducted in a balanced, non-partisan manner:

• Open to ALL candidates: ensure all candidates are invited (and a cross-representation of the candidate field must attend);

• Forum should cover broad range of issues;

• Include a broad range of nonpartisan questions for the candidates.

• Moderator must stay neutral and not imply approval / disapproval of candidates

• Candidate questions should be vetted in advance to ensure they comply with the nonpartisan / 501c3 restrictions

•Each candidate given equal time;

• Avoid co-hosting with orgs or coalitions that do not also comply with 501c3 restrictions;

•Do not directly call attention to the difference between a candidate’s position on an issue and TU’s position on an issue (this one is a little tricky and can be discussed with TU’s Government Affairs staff).

**Note:** As individual citizens, TU staff and volunteers are entitled to participate in political speech and advocacy not restricted by these guidelines. However, it is essential that no organizational resources be used (this includes printers, phones, email lists, postage, etc).

**Dot Your “I”s & Cross Your “T”s**Attention to detail early on in the planning process is the best way to ensure smooth sailing on the night of your event. Some scrambling will be inevitable, but if you focus on these following steps, you’ll have most of the bases covered.

1. **Invite Candidates**- About four months before your intended event, send an invitation letter to all major party candidates well before the planned event and follow up with a phone call, if needed. Be flexible; it may take some time to find a date that will work for all the candidates’ schedules. When inviting candidates, send them information on the chapter (e.g. current strategic plan, annual report, etc).

**TEN MISTAKES TO AVOID**

Watch out for these common mistakes to avoid:

1. Start planning late.
2. Send press releases without personal follow-up.
3. Assume the press will attend without multiple incentives and “new news” to cover.
4. Ignore neighborhood or non-English language publications.
5. Ignore local radio or media with natural constituencies.
6. 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.
7. Forget signs on buildings so people know where the forum is taking place.
8. 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.).
9. **No Insurance:** [Click here to request a free insurance certificate from TU’s insurer](http://www.tu.org/chaptercouncil-request-form-for-a-certificate-of-liability-insurance)
10. **Check the A/V:** Require a live test of the audio visual and sound systems at the venue at least 7 days prior to your event
	1. If it is a two-candidate race and only one candidate agrees to attend, you should not go forward with your forum. In a multi-candidate race at least two must confirm.
	2. 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 is no way signifies the endorsement of the attending candidate by your chapter.
11. **Find a venue-** When weighing venue options, the first consideration is to consider a neutral site for your forum —one that is not associated with any party, candidate or overly partisan issue. Then estimate a realistic attendance for your forum. How many people will realistically attend? Public libraries, schools or community meeting centers can be well suited for events like this. It’s better to start small and have standing room only than to have too many empty seats or pay too much for an oversized venue!
12. **Set a date-** Check for conflicting events on as many community calendars, school and university schedules, and other venues as you can to ensure maximum attendance. Avoid religious or government holidays, dates when other community functions are scheduled, and business hours. It is generally best to start the forum between 6–7:30 p.m.
13. **Select a Format-** A candidate forum can take many forms but every forum needs a moderator to introduce the candidates, start the dialogue and keep the discussion moving. Ask a well-known, nonpartisan member of your community to serve in this role — she or he will help generate interest in the event and add credibility. As you determine the best format for your event, remember that it’s important to select the option that best meets your community’s needs.

Potential forum forms include:

* 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 & 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/Hearing:** 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 Q & A:** As long as you follow the guidelines of nonpartisanship, you need not limit your forum to the formats outlined here. Feel free to be creative and do something fun that appeals to your constituency.

At the end, candidates provide closing statements, with an equal amount of time given to each candidate.

1. **Secure a Certificate of Liability Insurance-** TU National provides general liability coverage for all TU-sponsored events for both TU members and non-members alike. To obtain a certificate of liability insurance for your forum, fill out the online form at <http://www.tu.org/chaptercouncil-request-form-for-a-certificate-of-liability-insurance>. VolOps staff will process your request, usually within seven business days, and a certificate will be emailed to you along with the appropriate contact at the venue hosting your event. This certificate is often required by venue hosts to ensure TU’s liability policy will cover all claims that could arise from your event.
2. **Advertise-** 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.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. Invite the media to get involved **before** the event to draw a crowd, maximize your chapter’s exposure and make the candidates take the forum more seriously. Invite the media to the event to raise the profile of your chapter and raise candidate positions and election awareness. Send press releases to your local daily and weekly papers, as well as any local blogs, websites, or other media outlets that have community calendars.
	2. Professional advertising materials can have a significant impact on event attendance. You may have a graphic design volunteer in your chapter. If not, take advantage of TU’s relationship with TicketPrinting.com to order customizable posters, flyers, and other promotional materials here: <https://tu.ticketprinting.com>. An organized approach to hang posters and where they will be hung will help maximize your effectiveness in covering your area and surrounding towns. Consider sending a signup sheet around at a chapter meeting two months before the event for members to list locations they will put up posters and to help guide how many posters you’ll need to order. Posters are best placed at least one month and again two weeks before your event.
	3. Social media! One of the most cost-effective ways to advertise your forum is by creating an event on your chapter’s Facebook page. You can invite your Facebook friends, [schedule Facebook posts](https://www.facebook.com/help/389849807718635) to encourage attendance and share the post to other Facebook groups in your community. Facebook events are free to create, but can be “boosted” at a minimal cost. For most chapters, a boost to guarantee the post with reach 3,000-5,000 people will cost less than $20!
3. **Observe and Event Wrap-Up-** By taking notes on how things go during the event, you will be able to share your suggestions during a team debrief following the event to make improvements in subsequent years. Hosting a candidate forum can be stressful, but by continually improving on your practices, each forum becomes easier to organize and deliver a successful event. After the event, gather your team together to celebrate your successes, highlight areas for improvement and complete final tasks like sharing appreciation for the candidates, media, moderator and other volunteers. Consider follow-up media opportunities (LTE’s, blog posts, membership email update). Send follow-up correspondence to attendees to thank them for coming and offer additional opportunities to get involved, such as attending an upcoming chapter event or joining your chapter as a member, if they aren’t already.

APPENDIX 1- WEEKLY PLANNER FOR YOUR TU EVENT:

**16 WEEKS BEFORE THE EVENT**

**Meeting One**

Purpose: To establish the groundwork and ultimately, the success of your event.

Things to do:

* Chairman assigns committee positions and sets dates for all future committee meetings. It’s often helpful to establish sub-committees for Arrangements (venue details), Candidates (invitations, confirmations and reminders), Advertising, and others as needed.
* Select potential dates. Check for conflicts with other community events and public or religious holidays.
* Establish an attendance goal--in order to determine type of facility needed.
* Discuss potential locations and facilities for event.
* Establish a financial plan for event.

**14 WEEKS BEFORE THE EVENT**

**Meeting Two**

Purpose: Finalize candidate availability, location and forum form

Things to do:

* Sub-committee reports on candidates, location and facility research.
* Committee makes final decision on location and date.
* Discuss publicity options and opportunities. (TU bulk E-mail tool, website announcement, radio and TV public service announcements, newspaper, posters, or promotional flyers.)
* Report on financial plan and expense processing

Follow-up:

* Committee confirms location, facility and costs, both verbally and in writing.
* Advertising sub-committee designs direct-mail/e-mail letter and drafts media plan.

**12 WEEKS BEFORE THE EVENT**

**Meeting Three**

Purpose: Facility arrangements confirmed, reports by committee teams on respective tasks, plan how to publicize your event

Things to do:

* Arrangements Sub-Committee reports on final confirmation of completed event arrangements.
* Advertising sub-committee reports on publicity-advertising.
* Candidate subcommittee reports on progress; discusses format of forum.
* Advertising Sub-Committee reports on marketing plan.
* Treasurer's report.

Follow-up:

* Continue publicity campaign. TV and radio stations and newspapers have been contacted.
* Recruitment for a moderator begins.
* Advertising Sub-Committee gets in "high-gear”, distributes posters to committee members and key chapter volunteers to put up in assigned high-traffic areas.

**10 WEEKS BEFORE THE EVENT**

**Meeting Four**

Purpose: Review of committee assignments is very important. Committee now begins envisioning the day of the event.

Things to do:

* Review assignments and responsibilities of each committee person. Success requires a total team effort. Make certain everyone is aware of the importance of their tasks.
* Advertising sub-committee reports on publicity to date and response received.
* Review event schedule and format to remedy any issues. Determine who will start the event and who address the audience about the chapter.
* Treasurer's report.

Follow-up:

* Marketing efforts continue to keep the event on the radar of the community at large.
* Treasurer keeps an accurate account of all costs and incoming revenues.

**6 WEEKS BEFORE THE EVENT**

**Meeting Five**

Purpose: Review event day agenda and discuss additional volunteer needs.

Things to do:

* Advertising sub-committee reports on efforts to date.
* Evaluate publicity campaign. Is it creating public awareness? How can it be improved without incurring excessive cost?
* Discuss additional volunteer needs at the event (timekeeper, candidate greeter, chapter outreach staff, etc).
* Discuss design for chapter presence at event
* Treasurer's report.

Follow-up:

* Advertising sub-committee continues publicity campaign.
* Treasurer keeps an accurate account of all costs and income revenues.

**3 WEEKS BEFORE THE EVENT**

**Meeting Six**

Purpose: With only three weeks remaining, review all plans and continue envisioning the event day.

Things to do:

* Advertising sub-committee report.
* Treasurer's report.
* Arrangements sub-committee reports on event schedule and discuss room layout and equipment needs (AV, microphones, etc)
* Candidates sub-committee reports on candidates.
* Chair determines if any of the sub-committees are encountering problems, now is the time to address them. Remember, enthusiasm is contagious and a highly motivated committee is the key to success.

Follow-up:

* Call members and supporters who have not yet shared their intent to attend (All committee members should help.)
* Advertising sub-committee continues publicity campaign.
* Treasurer keeps an accurate account of costs and incoming revenues.

**2 WEEKS BEFORE THE EVENT**

**Meeting Seven**

Purpose: Continuation of pre-event planning and review needs for event.

Things to do:

* Advertising sub-committee report.
* Treasurers' report.
* Chair: Update on overall status of event. Cover all miscellaneous items and begin review of event checklist. Review final plans. Make final revisions.
* Plan for next week's meeting (rehearsal) at the event facility
* Create information for moderator to share (Welcome, audience instruction about what will occur (Who asks questions, how long answers can be, when does the audience participate and how — written questions, oral questions etc.).

Follow-up:

* Candidate sub-committee sends reminders to candidates and inform them of any pertinent details (parking, who will greet them, etc).
* Moderator is invited to attend the rehearsal meeting to go over event details on-site
* Treasurer keeps an accurate account of all costs and incoming revenues.
* Advertising sub-committee continues publicity campaign, hitting social media and radio hard.

**1 WEEK BEFORE THE EVENT-Rehearsal**

**Meeting Eight**

Purpose: To review all final details--rehearsal meeting should be held at the event site.

Things to do:

* Advertising sub-committee report
* Treasurer's report.
* Arrangement sub-committee briefs committee on event layout and strategy. Pay close attention to emergency egress, media areas, outside directional signage opportunities, chapter information display area and an area to collect event attendee contact information.
* Check public announcing system and lighting. Make sure they are adequate.
* Chair: covers miscellaneous items. Discuss last minute needs, adjustments, and make final review of event checklist.
* Committee sets time to meet for event preparation on the day of the event (Minimum of one hour prior to doors open and preferably two hours).

Follow-up:

* Chair readies tools and supplies to be used in setting up at the event.
* Follow-up on any changes determined in the meeting

**EVENT DAY**

**EVENT CHECKLIST**

Note: Full event committee and support staff meet for a minimum of one hour (preferably two hours) prior to start.

Things to do:

* Huddle up to reiterate the plan and individual assignments (Moderator, set-up volunteers, timekeeper, etc)
* Transport all equipment, tools, and materials to event location.
* Re-check audio-visual system and lighting.
* Arrange room (tables and chairs).
* Go over talking points for moderator.
* Place directional signage outdoors to direct traffic.
* Set up a welcome table near the facility entrance. The table should be manned by at least one volunteer to welcome attendees and encourage them to sign-in.
* Have candidate greeter in assigned location to welcome candidates.
* Make final review of arrangements and continue following your agenda. Timing is critical. Keep the evening moving at a brisk pace. Transitions must be smooth--show your guests that TU is a professional, well-organized outfit. Keep your announcements upbeat and brief.

**2 WEEKS AFTER THE EVENT-Debrief**

**Final Meeting**

Purpose: To review the event to celebrate successes, highlight future improvements and document outcomes.

Things to do:

* Chair shares appreciation for the team
* Sub-committee final reports
* Discuss follow-up actions (thank candidates/volunteers, discuss recruitment and media opportunities, reimbursements, etc)