



Guide to Organizing a Candidate Forum

On-Line Version

http://extension.missouri.edu/staff/documents/stakeholders/Guide-to-Organizing-a-Candidate-Forum_8-2010.pdf

Additional Stakeholder Relations Resources

<http://extension.missouri.edu/staff/stakeholders/index.html>

Guide to Organizing a Candidate Forum

Note: This guide will be most helpful for a forum involving local and state candidate positions. If United States congressional-level candidates are included, please contact Sandy Stegall, Director of MU Extension Constituent Relations, for additional information.

Contents

Guide to Organizing a Candidate Forum	0
What is a candidate forum? Why conduct one?.....	1
Who hosts a candidate forum?	2
Steps to planning a candidate forum.....	2
1. Form a planning team	2
2. Create a budget	3
3. Develop promotion and communications plan	3
4. Work with the media to obtain coverage for your event	4
5. Set the date	5
6. Determine which offices to include in a forum	5
7. Determine format	6
8. Select the moderator (and a backup)	7
9. Determine what additional roles and volunteers are needed	9
10. Secure a location for the candidate forum	9
11. Room set up — branding the sponsor(s) and other suggestions	10
12. Develop questions for the candidates — considerations	10
13. Post event	11
14. Fleshing out your plan: additional considerations	11
Marketing MU Extension	12
Organize a program showcase.....	12
Provide a Resource Area	12
For more information	12

What is a candidate forum? Why conduct one?

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.
- Provide candidates with an opportunity to make voters aware of their positions on issues in an educational, multi-partisan format.

- Showcase University of Missouri Extension as an entity with the capability to bring issues before citizens on an unbiased basis and provide them tools for decision making.

Since the role of MU Extension is education, it is recommended that you host a forum for educational purposes and not a debate between candidates. In a forum setting, candidates are asked questions, and they are to respond to questions from the sponsors and residents.

Who hosts a candidate forum?

Local and regional MU Extension councils are logical hosts for candidate forums. There could be beneficial partners in your community. Sometimes extension councils provide the lead; other times, they are the cooperating partner with another community organization.

When identifying partners, it is important to consider the public's perception of the potential partner. Appropriate partners are those viewed by the general public to be politically neutral and those with a broad-based appeal. Inappropriate partners are those entities that are viewed as biased; narrowly focused on one or two issues; or supportive of specific candidates, political parties or issues.

Examples of Potential Partners:

- County and Regional Extension Councils
- Local Media
- Mizzou Alumni Chapters

On a location-by-location basis, other organizations may make good partners, such as League of Women Voters or Farm Bureau.

When identifying partners and roles, it is imperative that those involved understand:

- MU Extension should not be put at political risk!
- Attitudes of county/regional extension councils and members should be unbiased.
- Faculty and staff cannot be seen as any candidate's campaign manager or as having any role with a particular candidate. Any form of campaigning on MU Extension property or at programming sites is prohibited.

Steps to planning a candidate forum

1. Form a planning team

A team representing all partners should begin planning a minimum of two months prior to the event. An effective planning team will:

- Consist of people viewed as politically neutral or having a balance of views within the committee
- Have clear roles and responsibilities for its team members
- Have a clearly defined decision-making process

- Have a clearly defined communications plan
- Build on history -- consider what has worked well and what hasn't in previous local forums or forums in nearby communities
- Communicate fairly and promptly with local media outlets
- Set a timeline and action plan
- Treat all candidates fairly and equally
- Document contact with candidates and contact method to demonstrate fair access to the process, e.g., certified letters to candidates.

2. Create a budget

Any event should have a budget attached to it so you can make sure you are not overspending. This event is no exception, although you are probably not charging people to attend. There are still real costs you need to track to accurately report the expenses. Before you can allocate the expenses, you need to make some decisions:

- Who will pay for the event's expenses?
- From what account will the event's expenses come? It is important to note that an MU Extension office cannot use appropriated funds (state, county, local, federal or any specified grant funds).
- How will the expenses be shared among the sponsors?

What are the expenses? (Use an MU Extension revenue fee worksheet as a guide.)

- Moderator
- Staging/audiovisual support
- Space rental
- Invitations (postage, paper/programs)
- Food
- Advertising
- Clerical support
- Staff time
- Other

3. Develop promotion and communications plan

Develop a promotion and communication plan specific to the audience.

Candidates:

- Personal contact prior to the formal invitation is appreciated by the candidates and more likely to get a positive response.
- Clearly explain to candidates that the event is a forum and not a debate. Accusations and name-calling will not be tolerated.
- Send out letters of invitation (i.e., by certified mail) BEFORE notice of the event appears in local media. Determine who will pay for postage.

- Prepare a packet of materials that may be helpful for the candidates' background/preparation for the forum. The packet should be provided one to two weeks in advance of the forum.

Items to consider for inclusion in a packet of educational materials about MU Extension for candidates:

- Check out the “What to Communicate about MU Extension” link on the Stakeholder Relations Webpage at <http://extension.missouri.edu/staff/stakeholders/briefing.html> for the latest publications resources to use with stakeholders.
- MU Facts brochure (available from MU University Affairs)
- District data sheets from UM System Government Relations Web site (Print out specific legislative district sheets: <http://www.umsystem.edu/ums/departments/gr/datasheets/>)
- Extension Pride Points
- General MU Extension brochure
- MU Extension budget flier
- Partners brochure (description of state and federal grants)
- Economic development brochure
- Mizzou Advantage flier
- List of county extension centers
- List of programs/staff in your region
- Description of county funding in the region and/or impacts from the region.
- Follow up with each of the candidates prior to the forum. Reference any materials sent ahead of time, and answer any questions they have about the process.

Media/promotion

- Learn your local media deadlines (e.g., weekly/daily paper press deadlines).
- Schedule media alerts/press releases.
- Consider inviting media reps to the event (and consider their needs if you do, such as reserved seating up front so that their microphones can capture the sound).
- Prepare flyers.
- Schedule or identify spokesperson for media interviews (ideally a volunteer).
- Prepare statements about the forum for internal newsletters, sponsor newsletters, etc.

Key groups/audiences for the event

- Identify the key audiences you want to make sure are in attendance for your event and the reasons behind those choices. Then put together a plan to invite them. Some examples of key groups could be the county and regional extension council, sponsoring partners, or other organizations that could be affected by the topic at the event. Some methods you could use to communicate are:
 - Personally signed letters sent to the members of the key groups
 - Personal invitation from council members.

4. Work with the media to obtain coverage for your event

Hopefully, you have already established a relationship with the major media players in your market. They know you, and you know them. Below is a suggested timeline for dealing with the press.

- Prepare press release announcing the event, and send out two weeks in advance to the proper media contacts. If your market has a weekly newspaper, you will want to consider sending the press release out three weeks in advance. Send to all related media at the same time, not in a staggered timing.
- Prepare a media alert stating the main themes and basics of the event to entice them to assign a reporter for the event. Send the alert out one week before the event. Again, if you are working with a weekly newspaper, make it two weeks out. Most media prefer you email them alerts.
- Once the media alert is sent, contact the media two days later to ensure they got it, and verbally try to secure a commitment that they will cover the event.
- Then typically three days before the event, re-contact the media with any new developments, and again work to secure a coverage commitment.
- The day before, again contact the media with any new developments, and attempt to secure a coverage commitment if you have not already gotten one. If you have, then talk to them about their needs (seating, Wi-Fi, audio, power, etc). Make their coverage of the event as convenient for them as possible.
- Supply the media with any reasonable requests so they can operate during the event. Make yourself available so they have an on-the-spot point person to assist with questions.

5. Set the date

- Check with the election board or your County Clerk's office to verify the election schedule. Don't depend on the dates printed in local media, as they may be inaccurate.
- Avoid potential date conflicts by checking with political party headquarters, the Chamber of Commerce and schools to determine major events scheduled in the community.
 - Do not check with individual candidates prior to setting the date, as this may be construed as favoritism.
 - Consider other local events that would complement or compete with a candidate forum.
- Consider having a contingency date (include in all media releases and communications with candidates).

6. Determine which offices to include in a forum

Counties and regions that have hosted forums in the past suggest these considerations:

- Include only those candidates facing opposition for a seat. Some forums allow candidates running unopposed to make a brief statement at the forum or to simply attend and greet the public informally.
- What are the "hot races" in your area -- the races with a lot of public interest? Your forum could potentially include:
 - Municipal officials (if there are not too many)
 - County officials

- State officials
 - Congressional seats
- Be as fair as you can in determining what races you're going to include in the forum to avoid charges of bias or election influencing. For example, if you are including one county-level race that has opposing candidates, consider including ALL county-level races with opposing candidates. At the actual forum, you can spend more time on some races than others.
- For each race in your forum, invite ALL registered candidates from ALL parties for the seat or none. It is not advisable to include only candidates of the two major parties if there is a third (or more) party with a registered candidate. A list of certified candidates can be obtained from the Missouri Secretary of State's Office (<http://www.sos.mo.gov/>) or the county's election authority.
- When inviting candidates, a personal contact from one of the sponsoring partners is encouraged, followed with a letter with details. A method for the candidate to respond, indicating their participation, allows you to verify their agreement to participate and to abide by the forum's rules. Once you have their signed agreement, there is no need for further communication with the candidates unless they contact the point person of the forum committee. You will need to contact them if they have not sent in their agreement form to participate or not by your set deadline.

7. Determine format

The format is a case-by-case determination based upon space, number of candidates participating, themes and focus of the forum. For example, the forum may be combined with an MU Extension program showcase, or it might focus on higher education so that MU Extension can be seen as an integral part of MU and higher education. If a particular issue is featured, it may be appropriate to include local ballot issues in a forum.

When determining the format, will you have a lone moderator? Will you have panelists asking questions with a moderator? Consulting with MU Extension Constituent Relations for suggestions on what has worked best in different settings is advisable. As you work through the format for your location, following are some decision points to help plan for success.

- What is the source of the questions? Options include any or all of the following:
 - Written by panelists
 - Written by non-panelist partners (e.g., local media)
 - Submitted by the public in advance (email, drop box, etc.)
 - Submitted by the public at the event using announced process (discourage open mic questions).
- Who will ask/read the questions?
 - Moderator?
 - Panel?
- Will opening and closing statements be allowed?
 - It is recommended that at least an opening statement be allowed, as some candidates struggle with "stage fright" during the Q & A portion of the program.
- Will follow-up questions be allowed, and if so, who will ask them?
 - The format of the forum will determine if follow up questioning fits your event. The moderator has the responsibility to keep the format as a forum and not a debate.

It's important to think about how you will handle this situation ahead of time because it's important to be consistent.

- Will you allow questions for just one candidate for an office, or will all candidates for that office get the same question?
 - There's no right answer on this one. The important thing is to strive for balance. For example, if you ask a specific question from an incumbent, you'll need to ask an equally weighty question – preferably about the same core issue – to his/her opponent(s).
- In what order will questions be asked of the candidates, and in what order will they be asked to respond?
 - In choosing an order, consider the relevance of the questions to the local political scene. Do not pick topics that are dead horses, and yet pick questions that people want to have answered. Regardless, consistency and fairness is a priority. It is recommended that you rotate the order of responses to questions, so that the same person doesn't always have the first (or last) response. Make sure the audience and the candidates are aware of the order being used for the questions and responses. Options include:
 - Ballot order by position
 - Alphabetical by position/office
 - By party by position
- What are the ground rules/expectations for audience members?
 - No questions will be taken from the floor.
 - Written questions may be submitted by method announced (e.g., on cards on the table, presented to the runners).
 - Questions that are personal, attacking or rude will not be asked.
 - Hold applause until the end of each set of candidates.
 - The moderator and event sponsors reserve the right to ask anyone to leave.
- What are the ground rules for the media?
 - No questions will be taken from the floor.
 - Media will have access to the attendees so they can get an on-the-street interview opportunity.
 - Media will have access to the candidates before and after the event to get their comments on the event or to clarify anything they may have said during the event.
 - Media will be seated upfront so they have clear access to the candidates.
- What are the ground rules/expectations for candidates?
 - Respect other candidates and the forum format.
 - Address responses to the audience, not the moderator or other candidates.
 - Respond to the question asked.
 - Respect the allotted time available to answer questions.
 - Candidates will have one minute for opening statements. (suggested time)
 - Candidates will have one to two minutes to respond to questions. (suggested time)
 - Candidates will have one minute for closing statements, if included in your forum. (suggested time)
 - The timekeeper will keep candidates informed of how much time is left.

8. Select the moderator (and a backup)

A moderator can make or break your event! For your forum to be a success, it is imperative that your moderator:

- Be publicly viewed as politically impartial
- Have experience moderating public events
- Have no obvious conflicts of interest (family members running, business affected by the election outcome, etc.).

The characteristics most desirable in a moderator include:

- Ability to handle any outbursts and conflicts with humor and charm
- A pleasant speaking voice
- Some knowledge of local issues
- Ability to think on his/her feet
- Ability to stay calm, even-tempered
- Ability to stick to the time schedule/format
- Ability to “read” an audience and the participants, heading off potential problems and making minor adjustments as needed.

Some good places to look for moderators include:

- Extension council chair or other member
- Media personalities
- Leading local citizens
- Extension colleagues.

The Role and Responsibilities of the Moderator:

It is always good practice to review with the moderator their roles and responsibilities prior to the event.

Those responsibilities include:

- Know the agenda/format for forum.
- Provide an introduction and purpose of the forum; review the format and rules that have been provided to the candidates.
- Review the ground rules for the audience.
- Introduce participants. If there are any names the moderator isn't sure how to pronounce, he/she should learn the correct pronunciation prior to the forum.
- Pose questions to participants (if that is your format).
- Pay attention to timekeeper, and enforce time limits. Remain neutral; do not express his/her

Sample Format

All candidates for one office are called to the stage and seated.

Brief candidate bios are printed on back of program.

Moderator introduces candidates.

Candidates give their opening statements.

Depending upon format, panel or moderator asks the first question.

Moderator asks for responses, proceeding in the agreed-upon order.

Moderator asks the second question.

Moderator asks for responses, rotating who goes first.

Moderator continues through the agreed -upon number of questions or until the time frame for this office is exhausted.

Moderator asks for applause as this set of candidates returns to their seats.

Repeat process for each office.

opinion, even unintentionally – no raised eyebrows, smirks or other telling facial expressions.

- Provide equal opportunities for each candidate to participate.
- Intervene when necessary. Keep comments within time limits and focused on the issue, not personalities.
- Ask only those questions approved by the forum organizers or on-site panel. Refrain from ad-libbing or asking follow-up questions unless that has been agreed upon in the planning process.

The planning committee should provide the moderator with:

- A detailed, timed program/agenda
- Introductory bios for candidates (if desired)
- List of others who should be introduced (panelists, sponsors, volunteers, special guests)
- Written list of ground rules.

9. Determine what additional roles and volunteers are needed.

Likely roles include:

- Hosts — Each candidate should have a host for the event. This is a good role for council members or partners.
- Timekeeper – Use a stopwatch to track time of opening statements, question responses and closing statements. The timekeeper needs to have a way of communicating unobtrusively with candidates and moderator through signs or hand signals, for example. A bell or buzzer is also useful for candidates who ignore the silent signals. You may need to have a couple of watch-watchers and a couple volunteers to signal time.
- Refreshment servers
- Runners to take questions submitted by the public to the panel or moderator
- Videographer
- Sound system operator
- Question reviewers
- On-site observers (security, cues to moderator/facilitator, unusual behavior, parking lot, etc.)
- Registration
- Setup and cleanup
- Media spokesperson/contact.

10. Secure a location for the candidate forum.

Characteristics of good locations:

- Local MU Extension center, if space is adequate
- Adequate parking

- Neutral (void of any implied message)
- Good acoustics (public address system available)
- Good lighting (particularly if aired over TV)
- Stage available if needed
- Void of distractions (competing sound, views out windows, etc.)
- Low or no cost.

Reserve the location as early as possible. In some areas, schedules and/or a shortage of suitable places may mean that you need to secure a location early in the planning process.

When identifying locations, consider all costs associated with staging. This includes costs for public address system, podium or lectern, risers, table covers, chairs, food and beverages, etc.

Will you serve food and/beverages? When planning for this expenditure, do not use local, county, state, federal or grant-appropriated funds.

- Refreshments help make the environment welcoming.
- Some venues, most commonly civic organizations, routinely include a cash bar at events held in their facility.

11. Room set up — branding the sponsor(s) and other suggestions

- What is behind the moderator and candidates is important for photos. Look at where banners are hung, displays set up, and where podium banners appear. Take a photo ahead of time and look at what is the background; what do you NOT want in the photo?
- Place the MU Extension logo on programs; partnering organizations may want their logos to appear also.
- Wear apparel with MU Extension logo or use MU Extension name badges. Sponsoring partners also may want to wear apparel with their logo.
- Arrange for an adequate sound system:
 - Multiple microphones (moderator, plus each candidate)
 - Spare batteries!

12. Develop questions for the candidates — considerations

Start with a general and easy question to get candidates warmed up. For example,

- “Why are you seeking public office [or re-election]?”
- “What are your qualifications for [this office]?”
- “If elected, what will be your top priorities?”

Should you provide questions ahead of time?

- Pro: Some candidates are not as skilled as others. Providing the questions in advance helps to level the playing field.
- Con: Candidates may not prepare their own responses.

- Pro: Providing questions in advance offers an opportunity to include questions specifically about MU Extension.

Will you allow questions from the floor?

Are candidates allowed to submit questions? (The general answer here should be yes; candidates are citizens too.)

Questions from the audience/floor — written and screened by a panel before asking:

- Invite audience members to submit questions ahead of time to the coordinators.
- Identify the question reviewers and the criteria for advancing questions:
 - Already asked?
 - Already answered?
 - Balanced for all candidates (specific office)?
 - Fits within the time constraints allowed?
 - Carefully review and reword questions as necessary to be sure they are not inflammatory, disrespectful and do not mention someone by name.
- To begin the forum, the partners may identify key questions important to the organizers. For example, questions about MU Extension and the University as an integral component of universities and higher education.

13. Post event

- Send thank-you notes to candidates, sponsors and volunteers.
- Follow up with personalized information if necessary; for example, information on specific MU Extension programs the candidate referenced.
- If you choose to create a post-event news release, highlight the number in attendance and sponsors. Avoid including a summary of the views stated by the candidates. Let the media coverage prevail.
- MU Extension employees are discouraged from being interviewed about the event. If someone is to be interviewed, it should be a volunteer (e.g., council member) rather than an employee.
If you are caught in an interview situation, return to the purpose of the event and core message. Do NOT SUMMARIZE THE FORUM AND DISCUSSION PROVIDED BY THE CANDIDATES.

14. Fleshing out your plan: additional considerations

If something could go wrong, what might it be, and what is the intervention plan? Examples:

- **Potential problem:** Moderator is ill the night of the forum.
Solution: Have a back-up moderator.
- **Potential problem:** A hot-button issue may result in protestors outside the venue.

Solution: Discuss the possibility of protestors and how to handle them with local law enforcement BEFORE the event. It's important to understand what their legal rights are, as well as your own.

- **Potential problem:** One of the candidates is known to have angry outbursts.
Solution: Ask local public safety officers to be on hand, but in a casual way in the back of the room. Make sure the moderator is informed of this potential problem, and discuss with the moderator what specific actions would be considered "crossing the line." The moderator should be cautioned against provoking the candidate; bad behavior is not a given. Should the candidate's behavior become unacceptable, remind the candidate of the rules, and give him or her the chance to behave appropriately. If poor action persists, call a break to the forum (to remove the audience), and ask that the candidate leave, under deputy escort if necessary.

What other events might occur that could affect the forum? Identify your potential problem and solution and be prepared! Consider:

- Public address system failure
- Inclement weather
- Needs of the press
- Candidates who don't show up
- Rowdy audience members.

Marketing MU Extension

Organize a program showcase

The candidate forum is an opportunity to market MU Extension programming. A guide for organizing a program showcase is found at: <http://extension.missouri.edu/staff/stakeholders/action.html>

Partners also may want to provide displays.

Provide a Resource Area

A booth or resource area at the forum (defined space, e.g., one or more eight-foot tables):

- Could be with the candidates' display area or separate
- Can display helpful handouts such as the Voter's Bill of Rights and voter registration information.

For more information

Any questions? Contact Sandy Stegall, Director of Constituent Relations; Mary Simon Leuci, Community Development Program Director; or MU Extension faculty and councils, who have helped host a candidate forum/showcase:

- Richard Proffer, SE Business Development Specialist
- Charles St. Clair, retired WC Community Development Specialist
- Tish Johnson, EC Community Development Specialist

- Georgia Stuart-Simmons, WC Community Development Specialist
- Karma Metzgar; NW Region Director.