Local PTAs, PTSAs and councils can host candidate forums. This toolkit provides resources and ideas that have worked in various communities. Please consider this a starting point and change the outline as needed to meet your community's needs.

Divide planning a candidate forum into three parts:

- Advanced planning
- Logistics
- Content of the forum

ADVANCED PLANNING

1. Build a team:

   The workload is not difficult. A single individual can do most of the work, but a team is advised. Ideas can be shared and discussed, and a group will run a less biased forum.

   The group can include several PTA members, several PTAs working together, a council or group of councils in a region, or an educational group within your school district. Some PTAs use a coalition that can include other nonpartisan community organizations.

2. Develop a timeline:

   Determine the date of the candidate forum as early as possible. Several months out is not too early. Candidates will get the date on their calendar, and you won't have as many problems booking the site.

   An excellent time to hold the candidates forum is a **few days before ballots are sent**, roughly three weeks before the election. See *Candidate Forum Planning Timeline and Checklist*.

   The following steps assume the candidate forum will be in person. Candidate forums can also be hosted virtually. If you are hosting a virtual event, see *Considerations for a Virtual Candidate Forum*.

3. Develop a budget:

   A candidate forum can have a very small budget. Typical expenses include facility use, mailed invitations and mailed thank you notes to candidates, water for candidates, some flyers for public meetings, and index cards.

4. Determine who pays:

   Will it be the PTA? Or, a coalition? If a local PTA is holding the candidate forum, it needs to be an event that is approved by the members and is in the PTA's budget in order to be covered by PTA insurance.

5. Determine if you will send a mass email or postcard to all school district households. Submit public records request for directory information for the school district (optional).

6. Determine if you will record the candidate forum. A volunteer or even a high school video production class student can help accomplish this. The camera should only focus on the moderator and candidates. Be sure to get permission from all the candidates and the moderator to record and post publicly.

7. Determine if and how you might solicit questions in advance. This can be done for either an in-person or a virtual candidate forum.

8. Determine if your PTA/coalition will send out questionnaires to all candidates. Decide the process for determining the questions.

9. Determine if you will also run a voter registration drive in conjunction with the candidate forum. The drive can be as simple as having voter registration materials in various languages available at the event.

10. Recruit volunteers that have no ties to any of the candidates. Volunteers will be needed as:

   • Greeters for both the candidates and attendees
   • Hospitality (refreshments)
   • Host to open the forum (often the PTA President or Advocacy Chair)
   • Leader of the Pledge of Allegiance (Girl Scout or Boy Scout troops are great for this, but are optional)
   • Moderator; this could be a region advocacy chair or representative from another nonpartisan group like the League of Women Voters
   • Question sorters
   • Distributors and collectors of index cards
   • Timers (2)
   • Someone to help with last-minute logistical problems

LOGISTICS

1. Location:

   Choose one that is centrally located in your community. The district school board room, an elementary school multi-purpose room, or a high school commons or theater may be the correct size. The room should hold 100 people comfortably (in case you get a great turn-

out). Make sure there is adequate, accessible seating available. Be sure to reserve the necessary audio and video equipment.

2. Invitations:

Call or email the candidates at least two to three months before the date of the forum. The candidates become very booked as the campaign closes; they will likely want to attend but may need to keep their calendar cleared. Once you have emailed or called, then send a formal written invitation.

3. Advertising:

Use PTA branding and a variety of communication methods.

- **Visual identity.** National PTA created advocacy-specific logos that can be used, in addition to your PTA's logo. Logos are available for the use of PTA leaders on our PTA Logos webpage.

- **Local press.** Immediately notify your local press that you are putting on a candidate forum. Make sure you include the date, time, location, who is sponsoring the candidate forum, and the format for the forum. Make sure that the forum is on the newspaper's calendar. See *Sample Press Release*.
- **School reader boards.** Ask the principal if they will post information about the forum.
- **PTA sources.** Email list, newsletter, Facebook page, etc. Be sure to share the information with all district advocacy chairs so they can publicize it too.
- **Other forums.** Try to find out who else is running candidate forums. The Chamber of Commerce and the League of Women Voters often host candidate forums. They may be willing to list your forum in their materials.
- **Flyers.** You can distribute them at school board meetings and other public meetings. See *School Board Candidate Forum Flyer*.
- **Kid mail.** Be sure to get approval from your principal. Kid mail uses school resources, so the principal gets to make the call.
- **School district mailing** using the directory information obtained by public records request (optional).
- **Teachers union.** You can ask the building union rep to put a flyer up in each of the schools
- **Local community colleges.** Many college courses ask students to participate in some form of civic engagement.

4. Refreshments:

    Decide whether to provide refreshments to attendees. Provide water for each candidate.

5. Room setup:

    - Microphones; one for the moderator, one for audience members, and one for every two or three candidates.
    - Screen; if necessary to display a slide show before the event or to display the questions during the event. A pre-event slide show can be useful to inform the audience about your PTA or coalition, show the candidates, and provide ground rules for the forum.
    - Desks or tables in front for candidates and lectern for moderator. Or set up more informally with simply setting chairs in a semi-circle. Make sure all are visible to the audience and video camera.
    - Table(s) for programs, index cards and pens, any returned candidate questionnaires, any voter registration or get out the vote materials. NO CAMPAIGN MATERIALS are permitted at a PTA-sponsored candidate forum.
    - Table for sorting of questions on index cards.
    - Paper, pens, name tags, and a name card on the desk or table for each candidate.
    - Signs at the doors stating that this is the candidate forum and the rules.
    - Index cards for questions (at least 250) and pens.

6. Thank you notes:

    Send one to each of the candidates after the event.

CONTENT OF THE FORUM

1. Length of event:

    Typically, about two hours. If combining districts, allow one hour per district.

2. Legislative candidates:

    You may need to invite candidates for more than one district as some districts (and even some schools) will be part of more than one legislative district.

    Remember that to be nonpartisan, you need to invite all candidates who have registered their campaigns with the Public Disclosure Commission. Go to https://www.pdc.wa.gov/browse/current-candidate-campaigns to search for each legislative district or school district. Candidates will be listed, along with the amount of money raised and expended so far.

3. Sequence of events:

    See *Suggested Agendas for Candidate Forums*.

4. Moderator:

   a. **Stays neutral.** The moderator cannot inject any of their views or opinions; they can have their own style, funny, serious, etc. But they cannot inject any type of information into the forum except clarity.
   b. **Keeps the forum moving.** They may be asking the questions, or they may be helping the audience to ask questions.
   c. **Select a confident public speaker.** They DO NOT need to know the answers. The moderator is an experienced facilitator, not an expert.

5. Questions:

   Determine who asks the questions.

   a. **Small group of 25 or less:** You can easily have more of a conversation at a smaller forum. People can come up to the microphone directly and ask their questions. Because of the small group, you don't need as much control. People prefer asking their own questions because they can then ask follow-up questions.
   b. **Over 25 people:** Larger groups need a controlled atmosphere. Sometimes people ask the same question repeatedly because they didn't like the answer the first time or weren't paying attention. Conversations can ramble and go off task in a larger audience, making the rest of the group feel they are not getting their concerns addressed. Solicit questions in advance via an online tool, and ask people at the forum to write their questions on an index card and turn them in to a committee. The committee reviews the questions, puts them in order, and hands the cards to the moderator, who asks the questions. The moderator can also have a list of questions determined by the organizing committee in case not everything gets asked or there is time to fill.

6. Format of questions:

   Decide whether each candidate will be allowed to give opening and closing statements and determine their length. No matter the source of the questions, every candidate must have the opportunity to answer each question. Rotate who answers first.

7. Answers:

   a. **Determine a time limit.** One minute is common. Some forums start with two-minute answers and partway through switch to one-minute answers. There can be a "lightning round" where candidates can answer yes or no questions by raising a hand or using green/red paddles. Varying the kinds of questions keeps the forum moving.
   b. **Time the answers.** Have two people time the answers with a stopwatch. A timer should indicate when 30 seconds and 10 seconds are left by using colored cards. For example, a green card held up could mean 30 seconds left and a red card can mean 10 seconds left. A sound should indicate when time has expired.

8. Formal Forum Alternatives:

- Speed Dating with the Candidates - A one- to two-hour discussion forum for voters and candidates in which small groups of voters gather for a brief roundtable discussion with individual candidates, one at a time. The candidates rotate from table to table at intervals of 10 minutes. The roundtable candidate forum is useful whether there are multiple, contested races or many candidates for one race. If an expected candidate does not show up for the forum, the other candidate(s) for that contested race may participate because the candidates are not answering the same questions at the same time. Unopposed candidates may also participate.

  It works like this: A candidate is seated at each table with a group of voters and one facilitator. The facilitator will begin the discussion by asking one pertinent question. Following the candidate's response, those seated with the candidate will have the opportunity to ask questions. Each roundtable discussion lasts around 10 minutes, after which a bell will notify the candidates to move on to the next table.

- Candidate Q & A in written form - While following the same professional, inclusive and nonpartisan guidelines as described above, this can be a great solution for PTAs that cover great distances, like specialty PTAs. The answers can be printed on a static webpage and then linked to various platforms that a PTA may use.

Considerations for a Virtual Candidate Forum

1) Decide on which platform you will use. Some important decisions to make:

   • Will you be in webinar mode, where only the candidates and moderator are visible, or in meeting mode where all attendees are visible?
   • Will your PTA need to pay to upgrade your platform license to accommodate the number of attendees? Be sure to include this in your budget, or seek a coalition partner who can provide the platform.

2) Can your platform provide close captioning and/or translation? Include directions for how to turn on those features in the slide deck so attendees can access these features.

3) Have several volunteers "behind the scenes" as co-hosts. All should know how to use the settings, have copies of the slides you are using, and even the questions. Sudden loss of internet can happen, and you want to have a backup plan.

4) Have dedicated volunteers monitoring the chat and Q&A. Decide how these features will be used: Will you allow all attendees to ask questions in the chat or Q&A feature? Will attendees be able to chat with each other? **Be sure to develop a code of conduct for attendees to be shown on the slides and be prepared to enforce it.**

5) Figure out how to keep time. It is most helpful when the candidates can see a timer. There are online timers that can be used and shown as an attendee. Be sure to research and test this in advance.

6) Be sure to have one or two practice sessions with your chosen platform, so all volunteers know how things work and to problem-solve and issues that are discovered.

Candidate Forum Planning Timeline and Checklist

Timeline assumes forum date in early October, before ballots are mailed.

July - August:

- ☐ Form planning committee
- ☐ Create email to candidates with possible dates; include photo/video release
- ☐ Create spreadsheet for candidates with contact info, dates contacted
- ☐ Consent form for photography and filming from candidates
- ☐ If the forum is in-person, book venue, include technology (projector, microphones)
- ☐ Design communications plan
- ☐ Submit public records request for directory information for school district (optional)

First Week September

- ☐ Identify interpreters if needed
- ☐ Confirm moderator
- ☐ Create survey or online form to submit questions (publicize via website, newsletters, press release and social media)
- ☐ Finalize press release, include link to submit questions
- ☐ Create social media Banner Ads
- ☐ Create newsletter content (list out candidate names, time, date, location)
- ☐ Promote candidate forum to local advocacy chairs and presidents

Mid-September

- ☐ Send out press release to area newspapers
- ☐ Announce event on area message boards, include local community colleges
- ☐ Send invitation to entire district via directory information (optional)
- ☐ Facebook event placement in all neighborhood and town discussion groups
- ☐ Obtain voter registration materials from county

End of September

- ☐ Confirm all candidates (call ones that haven't responded by email)
- ☐ Confirm venue and all equipment
- ☐ Confirm who is filming the event
- ☐ Confirm timer and timer helper (need 2)
- ☐ Determine event timing (opening statements, number of questions and length of answers)

☐ Choose questions

☐ Complete event slide show, if using one

☐ Complete event script

☐ Obtain notecards, pens, bottled water, basket for questions

☐ Make or find red/green flippers for lightening round, if needed

Post-Event

☐ Edit and post recording to the YouTube site or other video hosting platform

☐ Send thank you note to each candidate for participating, include link to video

☐ Create and share communications for candidate forum video

Suggested Agendas for Candidate Forums

School Board Candidate Forum	Legislative Candidate Forum 1 District	Legislative Candidate Forum 3 Districts
Scenario: Three positions are open, two candidates for each position	**Scenario:** Two positions are open	**Scenario:** A total of 12 candidates (each district has a senate race and a house race)
7:00-7:10: Introduction, explanation of format **7:10-7:30:** Each candidate has two minutes to speak to a question they received ahead of time **7:30-8:45:** Questions **8:45-9:00:** Let candidates mingle and chat with audience	**7:00-7:10:** Introductions, explanation of format **7:10-7:30:** Each candidate gets three minutes to speak to a question they received ahead of time **7:30-8:45:** Questions **8:45-9:00:** Mingle and chat	**District A** **6:00-6:05:** Introductions, explanation of format **6:05-6:45:** Questions **6:45-7:00:** Mingle and chat in outer room **District B** Schedule repeats 7-8 pm **District C** Schedule repeats 8-9 pm *Note no time for each legislator to talk at the beginning.

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Sample Press Release

PREScS RELEASE

Contact: _____ *(include name, title, and email)*

_____ PTA to Host Candidate Forum
for Candidates in _____ *(school board or legislative district elections)*

_____ *(Your town, WA Month, day, year of press release)* – _____ PTA, which is comprised of ____*(number)* PTAs at schools throughout the _____ School District, will host a Candidate Forum for candidates in _____ *(elected office)*. The forum will be held on _____ *(day, month, day, year, time)* at _____ *(full location name and address)*.

The following candidates have been invited to participate in the forum: *(list all candidates invited.)*

We respectfully request the audience be seated and ready to begin at _____ *(time)*. The structured forum will be moderated by _____ *(name or organization, if known at this time)*. Each set of candidates will be asked the same question. (*Insert any other details, like if there is an allotted time for an informal meet-and-greet with the candidates. Be sure to include if the forum will be recorded.*)

Insert a good quote about why your PTA is doing this forum, for example:
"Hosting this Candidate Forum demonstrates _____PTA's commitment to the PTA mission of being a strong advocate for the health, safety, well-being and education of every child." said _____ *(name and title)*. "Our state leaders will be making decisions that affect every family in _____ school district. We want to ensure that all voters can make informed choices in November."

Questions from the public can be submitted by _____ *(date)* at _____ *(link to online submission form)*.

The forum is free and community attendance is encouraged. However, distribution of campaign materials, including the carrying of signs, in the building by candidates, volunteers or members of the public is prohibited.

About _____PTA *(hyperlink to you PTA website)*

_____PTA _____ (*include something about your PTA*). PTA is a registered 501(c)(3) nonprofit association that prides itself on being a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education. Membership in PTA is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.

Sample School Board Candidate Forum Flyer

Meet the School Board Candidates

On_____ *(day, date)*, the candidates for the _____ School Board will attend a community forum at _____ *(location)*. Each candidate will speak for a few minutes and respond to written questions from the audience. The session will conclude small group gatherings to meet individual candidates.

The forum is being hosted by the _____ coalition, including:

_____ PTSA Council,

_____ Education Association;

_____ community group

School Board Candidate Forum
(Day, date, time)
(Location)
(Address)

Sponsored by _____ PTA

About _____PTA *(hyperlink to you PTA website)*

_____PTA _____ (*include something about your PTA*). PTA is a registered 501(c)(3) nonprofit association that prides itself on being a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for public education. Membership in PTA is open to anyone who wants to be involved and make a difference for the education, health, and welfare of children and youth.

ADD DISABILITY ACCOMODATION STATEMENT HERE

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