First Steps to Plan Your Event

- Identify nonpartisan partners
  - Confirm partners’ ability to support the event and make sure goals are aligned
  - Agree how partners will be displayed on all forum-related invites and materials
- Identify potential dates and times for the event (if a virtual event, you may want to have several options to offer candidates)
  - Confirm the date(s) with partners
- Develop forum budget, if any
  - If an in-person event, identify venue options and associated room and A/V costs and budget for signage
  - If a virtual event, compare costs and functionality for digital platforms
- Reserve forum venue or subscribe to virtual platform
  - Reserve necessary A/V, if an in-person event
  - Practice with virtual platform to ensure all technical needs are addressed
- Decide on format with partners (note: an equal time Q&A format where each candidate is given equal time to answer your questions is highly recommended)
- Brainstorm themes and draft questions with your partners
- Research and invite moderator (consider local journalists or TV news hosts)
- Identify volunteer needs, recruit volunteers and determine volunteer roles

Recruiting and Preparing Candidates

- As early as possible, invite all viable candidates to your forum
  - Follow-up with candidates 1-2 weeks after initial invite to secure their participation
- Develop ground rules for candidates
- Send updates to campaigns as new details are confirmed
- **2-3 weeks out:** Send final confirmation to campaigns with event details and instructions, including candidate ground rules

Promote Your Event

- Develop communications plan, mapping out key dates for promotion between now and your event
- Promote your event in newsletters and on social media
- Share template promotion language with event partners and other allies
- Determine if press are invited and (if yes), conduct press outreach
  - Compile press contact list
  - Once event is confirmed with candidates, send press advisory
  - Conduct follow-up with press contacts to determine participation
  - Alert campaigns if press will participate
Final Details Before Event (1-2 weeks out)

- Finalize questions or solicit questions from attendees
- Review key partner and volunteer roles
  - Select timekeeper to enforce time limits
  - Review ground rules with campaigns and moderators
  - Brief all staff and volunteers on ground rules, format and nonpartisan rules for the event
- Develop signage and slide needs
  - For in-person events, print sign-in sheets, name cards for candidates and signage to direct people to the event
  - For virtual events, develop welcome slides
- If virtual, test platform and do a run-through with volunteers and moderator
  - If possible, invite candidate staff for a brief overview
- Send reminder email to all audiences (encourage partners to do the same)
  - If you’ve required attendees to RSVP, email attendees with final details and instructions
- Send reminder to press contacts

On the Day of the Event

- Set-up stage and venue
  - Prepare tables for candidate materials
  - Place greeters at all entrance points
  - Put out name cards and signage
- Prepare virtual platform
  - Test audio and internet connection
  - Upload slides or other materials to welcome attendees

After the Event

- Send thank yous to candidates and moderator
- Send thank yous to partner organizations
- Follow up with coverage and highlights to your membership and audience