



Candidate Forum Checklist

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



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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