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

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