Healthy Community Forums

Guide to Planning a Successful Event

Welcome

Co-hosting Community Forums during an election cycle provides an exciting and unique opportunity to educate the public and candidates for office about public health issues.

This guide serves as a comprehensive tool for event coordinators, volunteers, and participants to plan successful, effective forums. Parts of this guide apply to different types of community events, not only Community Forums.

https://tobwis.org...

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**Table of Contents**

[**Forum Overview 4**](#_heading=h.30j0zll)

[**Purpose of Forums 4**](#_heading=h.1fob9te)

[**Goals: Why and for Whom 4**](#_heading=h.3znysh7)

[**Forum Format 4**](#_heading=h.2et92p0)

[**Organization: Who Does What 5**](#_heading=h.tyjcwt)

[**Rules to Remember: Nonpartisan Candidate Forums 5**](#_heading=h.3dy6vkm)

[**Other Key Criteria 5**](#_heading=h.1t3h5sf)

[**Proposed Ground Rules for Forum 5**](#_heading=h.4d34og8)

[**Logistical Organizing Checklist 6**](#_heading=h.17dp8vu)

[**Recruitment & Promotion 7**](#_heading=h.lnxbz9)

[**Speaker Preparation 9**](#_heading=h.35nkun2)

[**Media Relations 10**](#_heading=h.1ksv4uv)

[**Timeline 11**](#_heading=h.2jxsxqh)

[**Immediate Tasks 11**](#_heading=h.z337ya)

[**One Month Before Event 11**](#_heading=h.3j2qqm3)

[**Two Weeks Before Event 12**](#_heading=h.1y810tw)

[**Week of the Event 12**](#_heading=h.4i7ojhp)

[**Day of the Event 13**](#_heading=h.2xcytpi)

[**After the Event 13**](#_heading=h.1ci93xb)

[**Editable Resources and Tools 13**](#_heading=h.2bn6wsx)

[**Sign-in Sheet Template 14**](#_heading=h.3as4poj)

[**Program Handout Template 15**](#_heading=h.1pxezwc)

[**Sample Promotional Flyer 17**](#_heading=h.3o7alnk)

[**You are invited to attend 17**](#_heading=h.23ckvvd)

[**Healthy Choices, Healthy Communities 17**](#_heading=h.ihv636)

[If you plan on attending, please RSVP to [Phone #] 17](#_heading=h.32hioqz)

[**Sample Invitation Copy for Partner Newsletters/Listservs 18**](#_heading=h.1hmsyys)

[**Recruiting Volunteers by Phone: Strategies for Success 18**](#_heading=h.41mghml)

[Sample Phone Script: Recruiting Attendees for Candidate Forums 19](#_heading=h.2grqrue)

[Sample Phone Script: Confirmation and Reminder Calls 20](#_heading=h.3fwokq0)

[**Candidate Forum Scripts 21**](#_heading=h.4f1mdlm)

[Lead Organization Script 21](#_heading=h.2u6wntf)

[Moderator Script 21](#_heading=h.19c6y18)

[**Moderator Tips and Ground Rules 22**](#_heading=h.3tbugp1)

[**Sample Candidate Invitation Letter 23**](#_heading=h.28h4qwu)

[**Sample Candidate Follow-Up Letter 24**](#_heading=h.37m2jsg)

[**Candidate Briefing Outline 25**](#_heading=h.1mrcu09)

[**Media Templates 26**](#_heading=h.2lwamvv)

[Sample Press Release 26](#_heading=h.111kx3o)

[**FOR IMMEDIATE RELEASE 26**](#_heading=h.3l18frh)

[Sample Media Advisory 27](#_heading=h.206ipza)

[**Sample Debrief Tool 28**](#_heading=h.1egqt2p)

# Forum Overview



## Purpose of Forums

The purpose of a Community Forum is to educate advocates, the public, the media, and candidates for civic leadership about the importance of the public health framework. Focus on prevention and population-based health. Depending on specific co-host partner organizations, discussion may center on the benefits of reducing economic and social costs by preventing myriad community health issues – binge drinking, opioid abuse, mental health, violence, obesity – and the continued importance of tobacco control and prevention.

## Goals: Why and for Whom

Successful Healthy Community Forums serve several functions:

* To create media opportunities on the health, economic, and environmental issues related to healthy communities.
* To offer an opportunity for citizens and advocates to meet and learn more about legislative candidates.
* To offer an opportunity for state and local allied organizations to collaborate on a project in order to advance healthy communities.
* To educate and engage community members toward carrying out the health-improvement goals of each community.
* To highlight the effects of community health issues, the benefits of funding public health, and the associated health, economic, and environmental issues, as priority issues that the public supports and cares about and that deserve attention from elected officials and the media.

## Forum Format

1.5 hours is recommended and has been proven to be effective.

* **Community Education** (20-30 minutes)
	+ Suggested featured speakers:
	+ Person affected by tobacco-, alcohol-, or obesity-related disease
	+ Health or policy expert (e.g., tobacco control expert)
* **Legislative Candidate Forum Presentations** (30-40 minutes)
	+ Moderator welcomes, reviews format, and introduces candidates
	+ Candidates have two to three minutes (depending on number of candidates) of introduction time
* **Open forum - Q&A on community issues** (30-40 minutes)
	+ Theme is healthy communities and other specific health issues (e.g., tobacco, physical activity, nutrition, violence, alcohol or opioid misuse)
	+ Moderator reads from comment/question cards submitted by audience
	+ Candidates have one minute to respond to questions
	+ Candidates get one minute for closing comments

## Organization: Who Does What

Each Community Forum will be organized by a committee of coalition members and partner organizations. Partners help ensure that the planning committee has access to the necessary information, materials, and technical support to plan a successful event

The primary audience for the event includes:

* Supporters of healthy communities and tobacco control;
* Supporters of partner member organizations;
* Candidates for the state legislature; and
* Members of the media.

Lead organizations will:

* Establish the date of the forum;
* Secure the facility;
* Contact the candidates; and
* Secure a moderator.



# Rules to Remember: Nonpartisan Candidate Forums



501(c) (3) nonprofit organizations are permitted to sponsor candidate forums as long as they do not endorse, support, or oppose candidates or political parties.

## Other Key Criteria

Candidate Forums shall:

* Include questions and discussion on a broad range of health issues.
* Invite all viable candidates.
* Pose only unbiased questions to candidates.
* Avoid promoting one candidate or political party over another.
* Use an impartial moderator.
* Make the event open to the public.
* Use fair rules that candidates understand in advance and that treat all candidates similarly.
* Ensure that each candidate has an equal opportunity to present his or her views.

\* Forum organizers can encourage people to ask specific, unbiased questions of candidates and can provide sample unbiased questions to audience members.

## Proposed Ground Rules for Forum

* Candidate speaking order will be drawn by number. Order will rotate.
* No campaign signs will be allowed.
* All questions will be addressed to all candidates.
* Rebuttals will not be allowed.
* Ask moderator to give preference to shorter, clearer questions.
* End as close to the intended time as possible.

# Logistical Organizing Checklist

☐ Choose a date.Consult local calendars and consider allowing sufficient time to promote the event and for local news outlets to publish a story on the forum prior to the election.

☐ Select and schedule facility.

* Try to book a facility that does not charge a rental fee (e.g., community center or library).
* Make sure the facility is handicap accessible.
* Hire an interpreter (sign or bilingual), or ask one to donate his or her services.

☐ Identify lead contact person for facility arrangements.

☐ Arrange to have the following equipment and materials:

* Easel (for local co-sponsor sign).
* Chairs for candidates and audience.
* Long table for candidates.
* Podium for moderator. It is best to have the podium set up to the front and side of the candidates. The moderator should be able to see all of the candidates’ name cards.
* Microphones.
* Water for candidates and moderator.
* Note pads and pens for candidates and moderators.
* Name tags and tent cards for candidates and moderator. On candidate nametags, put the district that they are running for. *Be prepared: Candidates may show up without confirming attendance. Print name tags and tent cards for all candidates just in case.*
* Name tags for volunteers and staff. Include organization name.
* Stopwatch for timekeeper. Make sure timekeepers can be seen by all candidates.
* Time cards (e.g., 2 minutes, 1 minute, 30 seconds).
* Index cards and pencils for audience questions.
* Brief audience survey/evaluation forms.
* Long table to display literature from co-sponsors and for sign-in sheets. Put the registration table in an obvious place. The intent is to introduce attendees to co-sponsors and to collect contact information from attendees for follow-up.
* Forum program.
* Flags for the stage: United States and Wisconsin (optional).
* Camera.
* Refreshments (if allowed).

Resources:

Sample Sign-up Sheet

Sample Forum Program

# Recruitment & Promotion

☐ Create a team.Successful turnout is much more attainable if the work is shared. Recruit 3-5 people to help recruit attendees.

☐ Set a turnout goal.The event’s turnout goal helps prioritize and focus. A good turnout would be 50 people. To get 50 people to come, have at least 100 commit to attending. We recommend asking people who commit to attend to bring a friend. *A good goal is to invite at least 500 people.*

☐ Brainstorm a list of possible audiences.

* Staff, supporters and volunteers of health advocacy organizations, including American Cancer Society, American Heart Association and American Lung Association.
* Local coalitions in tobacco control, behavioral health, alcohol, and obesity.
* Developmental disabilities council members.
* Alcohol- and drug-free organizations and treatment groups.
* Behavioral health advocacy and provider groups.
* Hospital staff networks.
* Healthcare providers such as physicians, nurses, nurse practitioners, addiction counselors, respiratory therapists, and related associations.
* Physician specialty practices (pulmonary, cardiology, oncology, etc.).
* Healthcare worker unions.
* Public health staff and consumers.
* Local chapters or members of statewide co-sponsoring organizations.
* Faith communities and associations.
* Organizations that focus on specific ethnic groups (Hmong, Hispanic, etc.).
* Organizations that focus in communities of color
* School administrators, teachers, and school boards members.
* Early childhood professionals, childcare providers, and associations representing these groups.
* YMCAs/YWCAs.
* Chambers of commerce/business groups.
* Law enforcement officials.
* 4-H clubs, Boys and Girls Club, and other youth groups.
* Soccer, baseball, and other youth sporting clubs.
* Senior citizen organizations.
* Neighborhood associations.
* Parks & recreation departments and community education classes.
* League of Women Voters members.
* AARP members.
* Service clubs.
* Local Republican and Democratic organizations.
* Personal contact (friends, neighbors, and family members) of those on the planning team.

☐ Call contact people for each group on the list. Building and leveraging personal connections is key to good turnout. The list can be the foundation of outreach. The easiest way to do this is to divide the list among the group. Use talking points to guide conversation.

☐ Create event on Facebook or other social media sites.This reaches many more people. It also gives people a home base to view details on the forum. In the event description, include the purpose for the forum, what issues will be discussed, which candidates will attend, and when and where the forum will be held. Encourage those who RSVP as “attending” to promote the event and invite other friends via Facebook. Candidates can be encouraged to promote the event too.

☐ Mail out or email promotional flyers.Think strategically about posting flyers where interested community members will see them (e.g., physician clinics, libraries, community centers, etc.).

☐ Send supporting materials to allies. Provide sample text for a newsletter or listserv promotion and some talking points to all contacts who agreed to help spread the word. This will make it easy for them to drop it into their newsletter, email update, or remarks at the beginning or end of a training or event. Thank them for their help.

☐ Build and obtain lists.Keep an RSVP list to keep track of the people who agree to attend the forum, and track the people who agree to personally recruit others to attend. If possible, borrow membership and volunteer lists from allies to invite them, or ask these partner organizations to include an invitation to their lists.

☐ Make confirmation calls. Contact everyone who committed to attend and/or help spread the word; again, divvy up the list with the planning team.

☐ Make recruitment calls. A group of three to eight people with a script and a few phones can make up to 200 calls in a two-hour period. This can greatly increase the chance of high turnout because people respond best to personal contact. Split the list by who knows who, so the calls are easier to make and receive.

☐ Mail reminder postcards or send emails and Facebook messages.Multiple reminders greatly increase the chance that people will attend the forum and/or recruit others. Don’t leave friends or family members out of reminders; they may know someone on the planning team personally, but they still have busy lives.

☐ Contact local cable stations. See if they will tape and broadcast the forum. Generally, these stations are looking for material and will run the tape multiple times.

Resources:

Sample Forum Promotional Flyer

Sample Forum Newsletter/Listserv Text

Recruiting Volunteers by Phone: Strategies for Success

Sample Phone Script: Recruiting Attendees for Candidate Forums

Sample Phone Script: Confirmation and Reminder Calls

# Speaker Preparation

 The Moderator

☐ Identify and invite moderator.

Suggested moderators: media representatives, reporters, League of Women Voters.

☐ Meet with moderator. The moderator is very important to setting the tone and flow of the event. Make sure they are fully prepared. Walk through ground rules, procedures, and expectations.

Resources:

Forum Scripts for Lead Local Organization and Moderator

Moderator Tips and Ground Rules

 The Candidates

☐ Invite all candidates for State Assembly and Senate in the specified jurisdiction.

☐ Call the candidate and/or his or her campaign. Invite the candidate by phone or email, and let him or her know that a formal written invitation is forthcoming. Give information, but don’t stop there—ask for a commitment.

☐ Send a written invitation. Provide information about the event, the expected turnout, the press that’s been invited, the tobacco-free coalition and allied groups, and all event logistics. A sample letter is included on p. 23.

☐ Connect with the candidate’s campaign. Try to find someone on the planning team who has a connection to someone on the candidate’s campaign committee, such as the campaign manager. Have them call their contact and ask for their help in ensuring that the candidate participates.

☐ Make a follow up call. A week after the written invitation, call the candidate to get—or confirm—a commitment. During the call, emphasize that the planning team is conducting intense outreach and that there will be a crowd at the event.

☐ Confirm. Once the candidate has committed, send a confirmation letter with a summary of the event details. Thank them in advance for participating.

☐ Thank them again. Send a thank you to the candidates after the event.

Resources:

Sample Candidate Invite Letter

Sample Candidate Follow-Up Letter

Candidate Briefing Outline

# Media Relations

☐ Identify all media venues in the community or region.

☐ Invite the Wisconsin Eye and Wisconsin Public Radio to cover the event.

☐ Place forums on community calendars. This includes print, broadcast, cable, and city notice boards.

☐ Help identify local spokespersons (e.g., volunteers, physicians) willing to be trained to be interviewed by the media and/or speak at the event.

☐ Identify & train featured speakers from community. Media like to hear from individuals impacted by the issues at hand. If any speakers are willing to meet with media before the forum it will help to attract media to the actual event.

☐ Submit opinion columns and letters to the editor. Help identify local people (e.g., volunteers, nurses, or physicians) who are willing to write and submit opinion columns and letters to the editor.

☐ Create press packets to distribute at the event. Packets could include event overview and program, press release, fact sheets, contact information for event organizers, partners, and local spokespersons.

☐ Make follow up calls to the media to make sure the press has received the press release and advisory, answer questions, and encourage them to attend.

Resources:

Sample Press Release

Sample Media Advisory

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# Timeline



## Immediate Tasks

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Select facility and make scheduling arrangements | Now-6 weeks prior | Lead organization | Identify contact person for facility |
| Identify and recruit local organizations as possible co-sponsors | Now-6 weeks prior | Lead organizationplanning committee | Sponsors agree to use of name and help publicize event |
| Invite all local candidates for State Assembly and Senate | 4-6 weeks prior; anytime after the filing deadline of June 1, 2016 | Lead organization | Candidate lists |

## One Month Before Event

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Identify and invite moderator | 6 weeks prior | Lead organization | Moderator script provided in this guide |
| Mail/email invitation to all contact lists | 4 weeks prior | Lead state partner | Committee members mail/email to their contact lists |
| Place forums on community calendars (print, broadcast, cable, city notice boards) | 1 month prior | Planning committee | Template provided in this guide |

## Two Weeks Before Event

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Email press release announcing upcoming forum | 2 weeks prior | Planning committee | Template provided in this guide |
| Follow up calls to local media to ensure they will print or broadcast information about forum | 2 weeks prior | Planning committee | Discuss media response with state partners |
| Follow up with candidates to confirm participation and answer questions | 2 weeks prior | Planning committee |  |
| Send reminder postcard/email to all contact lists | 1-2 weeks prior | Planning committee |  |
| Prepare media packets | 1 week prior | Planning committee |  |
| Contact local newspapers and submit opinion column | Call editor of paper 10 days before to ask about submission; submit at least one week before | Planning committee | Work with state partners |
| Send letters to the editor promoting event | Week before event | Planning committee |  |

## Week of the Event

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Reminder calls to all invited  | 2-4 days prior | Planning committee |  |
| Email/fax media alert to press | 2 days prior | Planning committee | Template provided in this guide |
| Follow up calls to press | 1 day prior | Planning committee |  |

## Day of the Event

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Set up facility  | Day of event | Planning committee | Checklist provided in this guide |
| Take photos to share on social media and with partners | Day of event | Planning committee |  |
| Hand out press packets to media representatives | Day of event | Planning committee |  |
| Staff sign in sheet | Day of event | Planning committee |  |
| Track candidates who attend, number of attendees, and number/names of media representatives | Day of event | Planning committee |  |

## After the Event

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Timeline** | **Person or Group Responsible** | **Tracking and Follow-Up** |
| Compile news stories and coverage of the event to share with partners | Day of – 1 Week After | Planning committee |  |
| Letters to the editor | Week before (as promo) and week after as follow-up | Planning committee |  |
| Thank you notes to participating candidates, local sponsors, others | Week after | Planning committee |  |
| Hold a debrief meeting  | 1-2 weeks after event | Planning committee | Event debrief tool provided in this guide |

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# Editable Resources and Tools

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Address, City, Zip** | **Email Address** | **Phone Number** |
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## Sign-in Sheet Template

## Program Handout Template

TOWN MEETING

**6:30 p.m. – 7:00 p.m.**

Prior to each candidate forum, there will be a town meeting at which experts will discuss some of the most pressing health-related issues facing our legislature: Healthy Choices, Healthy Communities, and (*include any desired, additional topics here*).

**A SPECIAL THANKS TO…**

Thank you to all the staff and volunteers who worked very hard to organize and promote this Community Forum.

Your time and energy is greatly appreciated!

Thank you to all who came and participated in the Community Forum. Your support is important in improving the health of Wisconsin.

Thanks to the candidates who demonstrated their interest in addressing Wisconsin’s health concerns though legislative means.

Thanks to our moderator for providing an interesting and informative Forum.

Thank you to the facility that hosted our Community Forum and provided a wonderful space to hold this important discussion.

**Healthy Choices, Healthy Communities**

**TOWN MEETING &**

**CANDIDATE FORUM**

[DATE]

[TIME]

[LOCATION]

MODERATOR: [NAME]

**SPONSORED BY**

**[Insert logos]**

Thanks to the sponsoring member organizations!

Candidate Forums are educational events that are designed to inform the public about several critical health issues being addressed during this election cycle. The forums, content and conduct are strictly neutral, and no endorsement of any candidate by the sponsoring organizations is intended or to be inferred.

**CANDIDATE LISTING**

**[CANDIDATE NAME]** [CITY] [DISTRICT]

**PURPOSE OF THIS COMMUNITY FORUM**

***This Forum will let you, the voter, ask questions of candidates in a moderated forum.***

***Questions on a broad range of health issues are encouraged.***

***Please submit your questions on the index cards provided at the registration table.***

***As many questions as possible will be presented in the hour-long forum.***

## Sample Promotional Flyer



[PRINT ON INITIATIVE LETTERHEAD]

You are invited to attend

**[CITY] Town Meeting *and* Candidate Forum**

**Healthy Choices, Healthy Communities**

[DATE]

[TIME]

[LOCATION]

Candidates Invited to Attend Include:

Moderated by: [Moderator Name, Title]

**[Time] – Town Meeting**

*Attend an educational town meeting for information about Wisconsin’s leading health issues.*

**[Time] – Candidate Forum**

*Find out how your candidates stand on the health, environmental and economic issues related to creating healthy communities. The forums will let you, the voter, ask questions of candidates in a moderated forum.*

If you plan on attending, please RSVP to [Phone #]

**Event Sponsored by:**

*[List Sponsors Here]*

*Candidate Forums are educational events that are designed to inform the public about a broad range of health issues being addressed during this election cycle. The forums, content and conduct are strictly neutral, and no endorsement of any candidate by the sponsoring organizations is intended or to be inferred.*

## Sample Invitation Copy for Partner Newsletters/Listservs



**Voters to Ask Important Questions about (COUNTY’S/COMMUNITY’S) Health of (OFFICE) Candidates at Town Hall Meeting and Forum on (Day of Week and Date)**

Make your voice heard by joining **(names of organizations)** for a Community Forum focusing on health issues like **(health topic examples)** on **(date)** at **(location)**. Candidates for **(name of office)** will answer questions posed by voters. Prior to the forum, a town hall meeting featuring health topic experts will be at **(time)**. Candidates who have agreed to participate include: **[List each candidate’s name, party affiliation and district.]** For more information, contact **(contact person)**.

## Recruiting Volunteers by Phone: Strategies for Success



*This handout gives some tips for successful phone recruitment.*

1. **Use the phone script** provided or write one. Go over the phone script and practice a few times. Have materials nearby: contact information, blank paper, a pen, phone script, and contact list.
2. **Work in questions** the candidates will support. The first question should come early, and be followed by one or two more. This establishes a base level of agreement. The sample phone scripts in this packet are written this way.
3. **Ask questions with a tone that implies agreement**. Don’t let your voice convey uncertainty.
4. **Be yourself**. Keep it simple and conversational. As much as possible, allow the phone script flexibility to fit the caller’s personal style.
5. **Tell them why it’s important**. Tell them specifically why they are needed there.
6. **Ask.** Ask for their commitment. Be specific in order to get an answer.
7. **Be prepared for roadblocks**. “I don’t have time” is a common response. Be empathetic but reiterate the importance of the event.
8. **Make it personal**. Describe why it’s important and, if it’s a personal contact , why it should matter to them, specifically, to get involved.
9. **Try to leave the door open.** If there’s a sense that somebody is undecided and will not commit at that time, ask they would like to be sent information . Send some follow-up material and call them back.
10. **Follow up.** If somebody says “yes,” make sure to follow up with him or her within a few days. Send written information that confirms their commitment. Make a reminder call a day or two before the event.

### Sample Phone Script: Recruiting Attendees for Candidate Forums



*This handout can guide phone calls to community members to recruit attendees to the candidate forum.*

Earned media, flyers, brochures, newsletter articles, and email alerts are all good ways to get the word out about an event like a candidate forum. However, successful turnout relies most heavily on personal contact. This often means lots of phone calls to friends, colleagues, family members, membership lists, and volunteer lists to ask people to attend. One way to make those phone calls easier is to use a phone script that incorporates basic talking points into a specific call to action.

A sample phone script follows:

**“Hello, may I please speak with [name]? I am [first name] and I am calling from [name of group or organization]. I am not calling to ask for money. Do have a minute to talk with me?**

[If no, ask for a more convenient time]

**“We’re teaming up with ‘Healthy Choices, Healthy Communities’ to host a town meeting and candidate forum in [state location]. This election year allows us the opportunity to directly ask our candidates where they stand on health issues and inform candidates about public health priorities.**

**“I’m calling today to encourage you to attend the forum on [date] at [time]. High turnout demonstrates to candidates that health issues are a high priority to us voters. Can I count on you to come to the forum?”**

If yes:

***“Thank you so much! Can you also bring two people with you to the forum? Maybe a couple of family members, friends or neighbors?”***

**“Thank you for your help. I’ll send you information about the forum. I’d like to confirm your contact information.”**

Get phone number, mailing address and email address.

***“Again, thanks for your help. Someone will call to remind you [state amount of time] before the event.***”

If no or not sure:

“***Perhaps I could send you some information on the event? May I verify your contact information?”*** Get phone number, mailing address and email address.

***“Thank you!”*** End call.

#

### Sample Phone Script: Confirmation and Reminder Calls



*This handout can guide reminder calls to committed attendees.*

The confirmation and reminder call are the most important calls. Be sure to set aside time in the days prior to the event to make reminder calls. Do NOT skip this step.

***“Hello. Is [name] there? This is [name], and I’m with [state organization]. I’m calling to remind you about the community candidate forum that you are attending this coming [day, date, and time]. We are counting on your being there!***

***It’s important that we have a lot of people at the forum so that the candidates understand that health issues are important to our community. We’re hoping for very high turnout. Can you bring two friends with you?”***

If yes: ***“Thank you. That will make an even bigger impact.”***

If no: ***“I understand. Thank you for committing to attend. Your presence will really have an impact.”***

**“The forum is located at [location]. Do you have any questions for me about the time or location?”**

If yes: Answer questions.

***“Can we count on you to be there on [day of event]?”***

If yes: ***“***Great!”

If no with some flexibility in the reason: “***I hope you’ll reconsider. This is a great opportunity to have a lively dialogue with the candidates about these issues.”***

If no with no flexibility: “***I hope you’ll encourage a family member or friend to go for you instead. Can you do that?”***

If yes: “***Thank you so much.”***

If no: “***Thank you for your time.”***

**“If you need more information, feel free to call me [give contact information].”**

***“Thanks again!”*** End call.

## Candidate Forum Scripts



### Lead Organization Script

Introduction or call to order:

Hello, my name is (name) and I am with the (organization) in (city). Welcome to (city) candidate forum – **Healthy Choices, Healthy Communities**. We are very pleased to be providing you, the voters, a forum where you can hear from your legislative candidates on the health issues that are most important to you. Before I introduce (moderator name), our moderator this evening, I would like to take this opportunity to thank a few people:

* First, I would like to thank all of our sponsoring organizations that helped make tonight possible – (list local sponsors).
* Next, I would like to thank all of the candidates for taking time out of their busy schedules to be with us this evening.
* I want to personally thank (moderator name) for moderating tonight’s forum, and
* Lastly, thanks to all of you for coming out tonight and making this event successful through your participation.

I would like to introduce our moderator. (Moderator name) is (insert bio --a few facts about the moderator – career highlights, family, where born, where they went to school etc.).

### Moderator Script

--Introduction--

Hello, and welcome to the forum. I will begin by explaining how we will be proceeding for the next hour and then I will introduce our candidates. Soon volunteers will be collecting your question cards. Please write your questions related to healthy communities, prevention, and tobacco on the index card that was handed to you as you entered. I will try and get through as many questions as possible in the short amount of time that we have.

Now, I would like to briefly outline the forum format. We will begin by asking each candidate to make an introductory statement. At the end of the evening, each candidate will be given time to make closing remarks. I will pose the questions to all candidates. Answers will be limited to one minute. I would like to remind everyone this is not a debate so there will not be any rebuttals. With that, let me introduce you to our first candidate.

Insert candidate names and brief biographies.

--Conclusion at the end of the forum--

Repeat thank you to the candidates and the audience.

We hope that you enjoyed tonight’s forum and please remember to exercise your right to vote on November \_\_\_.

## Moderator Tips and Ground Rules



* **Disclaimer:** The moderator should be fully informed that this event is a 501(c) (3) activity.
	+ The moderator needs to be neutral.
	+ Questions need to be posed in a neutral format.
	+ Each candidate should be treated equally and be given equal time.
	+ Candidates are not allowed to campaign (mention endorsements, hand out stickers or campaign literature, raise funds, etc.). Campaign literature can be available on a resource table but not actively distributed.
	+ The forum needs to cover a broad range of health issues and cannot focus singularly on one topic.
* **Candidate Briefing Meeting:** The moderator should gather all of the candidates for a pre-forum meeting. Ideally this meeting should be held in a room that is separate from where the town hall meeting is being held. This meeting is the time for the moderator to inform the candidates of the ground rules and answer questions.
* **Candidate Ground Rules:** The moderator should inform the candidates of the following:
	+ This is not a debate. Rebuttals are not allowed.
	+ Questions will be posed in a neutral format.
	+ Candidates will receive equal treatment and equal time to respond to questions. Timekeepers with signs will be sitting in the front row to help candidates.
	+ The forum will be covering a broad range of health topics. Members of the audience will submit questions.
	+ No campaigning will be allowed.
	+ Candidates will be given time for an opening and closing statement.
* **Forum Process:** The following is the recommended process but can be tailored for your specific forum.
	+ Seat candidates in alphabetical order at the head table, not by legislative race.
	+ After the call to order and introduction of the moderator (by lead organization), the moderator should do a brief introduction of the candidates (name, seat they are running for, and a few points of interest from the bio that they submit).
	+ Next, the candidates will have up to three minutes (depending on the number of candidates at the forum) to introduce themselves to the audience.
	+ There will be a volunteer sorting through and grouping audience questions and then handing them to the moderator.
	+ Candidates should answer the first question in alphabetical order. Subsequent questions should be answered by starting with the second candidate and continue to rotate through. It is important that the same candidate does not always answer first.
	+ The moderator will give the candidates one minute each to make closing remarks.

## Sample Candidate Invitation Letter



DATE

NAME

ADDRESS

ADDRESS

Dear CANDIDATE NAME:

**Healthy Choices, Healthy Communities**,a coalition representing state and local health organizations, is pleased to invite you to participate in a town hall meeting and candidates’ forum on DAY OF WEEK AND DATE at PLACE.

The focus of the town hall meeting and forum will be on health-related issues, including SPECIFIC ISSUE AREAS. We are particularly interested in your positions on funding, priorities, and solutions to critical health-related issues.

A town hall meeting, during which the audience will get an overview of the issues from expert presenters, will run from TIME to TIME. You are cordially invited to attend.

The forum will begin at TIME. We will have a non-partisan moderator. The format for the forum will be as follows:

· Each candidate will have two to three minutes for an opening statement.

· The moderator will read written questions from the audience and direct each question to each candidate. There will be one minute for each response.

· Each candidate will have up to 90 seconds for a closing statement.

We expect an audience of about 100 people including health care providers, people with disabilities, seniors, advocates, parents, direct support workers, nurses, local business representatives and other health care professionals.

We have contacted local media and are seeking the widest exposure possible.

We know how busy campaigns are and how many requests you receive and appreciate you taking the time to be a part of the **Healthy Choices, Healthy Communities** community forum.

If you have any questions, or if I can provide more information, please call me. It would be most helpful if you could confirm your participation by DATE. Thank you again.

Sincerely,

NAME

CONTACT INFO

## Sample Candidate Follow-Up Letter



DATE

NAME

ADDRESS

ADDRESS

Dear CANDIDATE NAME:

We are very pleased you will be able to join us on DATE for the “**Healthy Choices, Healthy Communities**”community candidateforumbeing held at the LOCATION. This letter addresses some of the event details.

Prior to the actual candidate forum, a community education session on health issues will take place from TIME. During this time we will meet briefly with all candidates to review the process for the evening. The candidate forum, which is on health-related issues, is scheduled from TIME to TIME. We will have a non-partisan moderator. The format for the forum will be as follows:

* Each candidate will have two to three minutes for an opening statement.
* The moderator will read written questions from the audience and direct each question to each candidate. There will be one minute for each response.
* Each candidate will have up to 90 seconds for a closing statement.

So that the correct information is shared during the introductions, will you please send me the following information, keeping in mind that the introductions will only be about 30 seconds:

* + Your name
	+ Your party
	+ City of residence
	+ Seat you are running for (also list current seat, if applicable)
	+ Educational background (e.g., degree, college attended)
	+ Community-related info. (e.g., belong to XXX church, member of XXX, participates in XXX, profession is XXX)
	+ Other info of your choice (e.g., married with two children, hobbies, etc.)

On the night of the forum, please pick up your nametag at the registration table. Forum organizers will also be wearing nametags so you will be able to identify them. Please feel free to contact me if you have any questions.

Sincerely,

NAME

CONTACT INFO

## Candidate Briefing Outline



This is an outline of what to cover during the candidate briefing. The meeting should include the moderator, the lead organization and the candidates. The lead organization representative should conduct the briefing. The briefing should take place 15 minutes before the start of the forum.

* Welcome
* Introductions
* Guidelines
	+ Time limitations, watch for signs
	+ Candidates seated alphabetically
	+ Rotating order of responses
	+ Each question will be presented to all candidates
* Body of forum
	+ Introduction of moderator, moderator welcome
	+ Each candidate will have two to three minutes for an introduction or opening statement.
	+ Q/A period: The goal is to get through four or five questions.
	+ Each candidate will have 90 seconds for closing remarks.
* Questions
* Thank you

## Media Templates

### Sample Press Release



FOR IMMEDIATE RELEASE

Date

Contact: Name of local contact, phone number

 Name of Coalition media contact, phone number

Race for (name of office) Heats Up

Candidates to Forum at Town Hall Meeting on Health Issues

**(Name of candidate)** and **(name of candidate)** will discuss their positions on local health topics at a town hall meeting and forum on **(day of week, date)** at **(place)**. The town hall meeting begins at (time) and the forum begins at (time).

The town hall meeting and forum is being co-sponsored by **(name of local organization)** which **(describe the organization’s focus)**. “This is a golden opportunity to see where our candidates stand on the health issues that affect us all, like **(give examples of topics covered in the forum)**,” said **(name of local spokesperson)**.

**(Name of spokesperson)** continued, “The health problems facing **(community/county name)** aren’t going to solve themselves. It will take real leadership to address these issues, and the questions asked in this forum will give community members a better sense of each candidate’s approach to ensuring our kids, families and local businesses can thrive.”

In addition to the candidate discussion, expert presenters will provide an overview of the key health issues addressed in the forum, followed by an audience question and answer session with the candidates.

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### Sample Media Advisory



NEWS ADVISORY

Date

Contact: Name of Contact and phone number

**Voters to Question (Candidate Names) on Health Topics at Unique Town Hall Meeting and Forum on (Day of Week and Date)**

**WHAT:** Candidates for (name of office) will answer questions posed by voters at a Candidate Forum focusing on health issues like **(give examples)**. A town hall meeting at which experts will discuss the issues will be held prior to the forum. Candidates who have agreed to participate include: [List each candidate’s name, party affiliation and district.]

**WHEN:** [DATE]

 Time – Town Hall Meeting

 Time – Candidate Forum

**WHERE:** [LOCATION – INCLUDE DIRECTIONS IF NECESSARY]

**MORE INFO:** The candidate forum is co-sponsored by**(list organizations)**. **(Provide very brief overview of the objectives and topics addressed by the sponsoring organizations)**.,The forums are an opportunity for candidates to hear which health care issues are most important to voters. The meetings encourage informative discussions and engage the community.

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## Sample Debrief Tool



# Event Debrief Tool

|  |
| --- |
| **Organizing Alliance:** |
| **Event type:**□ Town hall meeting □ Candidate forum □ Legislative breakfast□ Women of Influence □ Meet and greet □ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Brief description of event goal(s):** |

|  |
| --- |
| **Event Details** |
| **Event date: Day of the week:** |
| **Event time: Event length:** |
| **Community: Venue:** |
| **Did the date/time/location/room set-up meet your needs? Why? Why not?** |

|  |
| --- |
| **Audience** |
| **# overall attendance:**  |
| **# key target group in attendance (i.e. elected officials, grass tops, youth):** |
| **# staff/coalition leaders:** |
| **# less active members/supporters:** |
| **# new individuals:** |
| **Key turn-out strategies used:**1.2.3. |
| **Who did you want to attend? Did they attend? Which turnout strategies were effective?** |

|  |
| --- |
| **Presentation** |
| **Strategies used to communicate information and/or motivate action:**1.2.3. |
| **Did people understand the main message(s)? Which strategies were most effective in helping them understand the main message? Will they take action? Why? Why not?** |

|  |
| --- |
| **Media** |
| **#/Type of media coverage:**  |
| **Key media strategies used:**1.2.3. |
| **Did you get the media coverage you wanted? Why? Why not? Which media strategies were most effective? Least effective?**  |

|  |
| --- |
| **Future events** |
| **What should you do again next time? Strengths of the event:** |
| **What should you change? Suggestions/Improvements for future events:** |