



VOTER EDUCATION TOOLKIT

A Handbook for Organizing Candidate Forums and
Creating a Voter Guide

2019

Empowering Voters
Defending Democracy

CONTRIBUTORS:

Maryann Barnes, Cleveland Heights-University Heights Chapter
Conda Boyd, Bay Village Chapter
Nancy Calcott, Rocky River Chapter
Patricia Carter, Shaker Heights Chapter
Wendy Deuring, Cleveland Heights-University Heights Chapter
Carol Gibson, Cleveland Heights-University Heights Chapter
Marcia Goldberg, Shaker Heights Chapter
Fern Jennings, Cleveland Heights-University Heights Chapter
Kathy Kosiorek, Lakewood Chapter
Janice Patterson, Westlake-North Olmsted Chapter
Nikki Salupo, Fairview Park Chapter
Meryl Simon, Shaker Heights Chapter
Blanche Valancy, Cleveland Heights-University Heights Chapter

League of Women Voters of Greater Cleveland
2800 Euclid Avenue #518
Cleveland OH 44115
lwvgreatercleveland.org

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Preface

The League of Women Voters has grown since 1920 with that same urgent “vote” mission to reach citizens everywhere. We educate high school age-eligible youth, as well as college and university students, about researching their candidate choices in local, state, and federal elections. We emphasize the importance of primary elections that lead into general elections. We have revitalized our dedication to our local immigration naturalization ceremonies to ensure new citizens begin their journey with the “right to vote.” In the 99 years that the League of Women Voters has existed, its mission is even more urgent today with our voting rights being questioned by national leaders. As said in the prior edition of this toolkit by my predecessor, many organizations have a mission, but few have as honored a reputation as the League of Women Voters does for providing nonpartisan, unbiased candidate information for the public to make their choices at the voting booth or by mail.

Patricia Carter, Director of Voter Service Network
League of Women Voters of Greater Cleveland

1. Introduction

As we approach the 100th anniversary of both national women’s suffrage in the U. S. and the founding of the League of Women Voters (LWV), the League is positioning to face major media changes and challenges to our American democracy. Our mission statement has been condensed from 36 words to a punchier four words: “**Empowering Voters. Defending Democracy.**” Nevertheless, the League’s efforts to educate and support voters are as thorough as in the 1920s when it undertook to educate America’s newly-enfranchised women.

The League of Women Voters as “nonpartisan”

A key purpose of this handbook is to help volunteers fulfill the promise of the League of Women Voters’ nonpartisanship policy in planning and presenting voter education activities. In using the term “nonpartisan” the League asserts that it does not endorse or support any political policy or candidate for office. In its execution of candidate and issue forums, Voter Guides, and voter registration, the League takes no sides and strives for fairness to all

The League does take positions on issues, but after member study and consensus. The League of Women Voters of the United States (LWVUS), the League of Women Voters of Ohio (LWVO), and the League of Women Voters of Greater Cleveland (LWVGC) have accumulated many policy positions through the years, which it has promoted through varied advocacy tools, which may include public forums and editorials. This advocacy, however, lies outside the scope of this handbook.

This handbook has been created to help members of LWVGC, which includes ten chapters serving about 20 local municipalities and communities within Cuyahoga County, deliver unbiased voter education, in the form of candidate forums, issue forums, and Voter Guides, to their communities. Many volunteers may want or need to deviate from the specifics of these instructions to suit challenges unique to their communities and chapters. They can use the material presented to create their own checklists and notes to help them with future forums. However, they must take care to maintain practices consistent with League’s commitment to unbiased information and a fair process in candidate races.

Internettools new to this edition

The rapid development of internet resources for the League of Women Voters generated significant changes from the first edition of this toolkit. Since then, LWVGC has subscribed to VOTE411.org, an online Voter Guide service provided by the national League of Women Voters, and expects to carry that service indefinitely into the future. This has changed several voter service procedures, especially in the creation and generation of a Voter Guide.

Also, LWVGC has set up a YouTube channel where full videos of forums are uploaded for public viewing. This has established a practice of videotaping most, if not all, candidate, ballot issue, and other educational forums.

Online resources for this toolkit

In addition to the information provided in this manual, forum and voter guide organizers can go to the LWVGC website to find signs and templates that can be downloaded, adapted, and printed for use in a candidate forum. Also available will be links for most of the URLs provided in this toolkit. To find those resources go to lwvgreatercleveland.org and look under “Member Resources.”

2. Deciding Voter Service Activities

RESEARCHING THE UPCOMING BALLOT

Where to look

To plan voter service activities for an upcoming election, whether for a primary or the General Election, start early to research what races and ballot issues will be on the ballot. The best place to start would be the Cuyahoga County Board of Elections website: boe.cuyahogacounty.us. Look under “Candidates” to find the upcoming year’s election calendar.

Election cycles

Elections for national, state, and county offices take place in even-numbered years. All members of the U.S. House of Representative and the Ohio House of Representative are up for election every two years. Other county, statewide, and national offices have four-year terms and some terms are staggered.

See page 41 for a complete listing of elections cycles in Ohio and Cuyahoga County

Local elections

In Ohio, local elections, which include those for mayors, city council members, school board members, municipal judges, township offices, and a few other local offices, take place in odd-numbered years. Municipal judges serve six-year terms, while all other offices have four-year terms. Local communities vary in the number of seats open in a given cycle. Depending on the community, all city council seats may be on the ballot every four years, or the terms may be staggered. Some cities have wards, others have at-large council members, and some have both. Some cities have primaries, others do not. For city offices with primaries, some primaries take place in the regular spring Primary Election and others later in September.

Ballot issues

Ballot issues are important but can be legalistic, confusing, or simply not widely covered or advertised and whatever information League can provide is often popular. League ballot issue forums tend to be widely viewed, according to LWVGC’s YouTube Channel viewing statistics. For the Voter Guide, LWVO covers statewide issues. LWVGC board and directors cover countywide issues, but depend on chapters to provide information on issues in municipalities and school districts. Information on how to presenting ballot issues can be found on page 29 for a forum and on page 36 for a Voter Guide.

Ballot issues can appear on any primary ballot as well as the November General Election ballot. In August, there is an issues-only election, which only take places if issues are filed.

INTRA-LWVGC COLLABORATION TO COVER RACES

Even-year elections create the greatest need for collaboration among chapters and the LWVGC board and directors, as district areas for Congress, the state legislature, the state board of education, and county council cover more than a single chapter area. While the LWVGC board can do forums for countywide offices, such as the county executive or judicial races, and areas not covered by chapters, LWVGC looks to its chapters to cover more localized races in chapter communities. Chapter chairs, the LWVGC Voter Service Director, and the LWVGC Chapter Liaison must confer early in the year to assign roles.

In odd-year elections, chapter responsibilities are clearer as chapter areas are usually congruent with municipal areas. However, even here, need for inter-chapter collaboration may arise. School district boundaries often differ from municipal boundaries and there are municipal courts that serve multiple communities. Lack of diligence and inter-chapter communication can create conflict when multiple chapters contact the same candidates for different forums or leave “orphaned” areas not covered by League voter service even when races fall within a chapter area.

Should the LWVGC be fortunate in acquiring grant funding that may support chapter voter education activities, clear communication between the LWVGC board and chapters would be crucial for grant coordination, distribution of funds, and data collection.

ROLES OF THE LWVGC BOARD AND DIRECTORS

Chapters do the bulk of the work in voter service projects, but the LWVGC board and directors provides some essential coordination, resources, and services. These include:

- Help coordinating chapter collaborations
- Help avoiding forum scheduling conflicts with other League events
- Ballot information, perhaps saving the local chapter some research time
- Stationery, logos, labels, envelopes, banners, signs, and other useful supplies
- Some funding, if the chapter is short of funds, or if the LWVGC has accepted grant funding to support chapter voter service
- Help finding a videographer for forums
- Uploading video to LWVGC YouTube channel
- Support and coordination for participation in VOTE411.org
- Publicity through LWVGC internet tools, such as social media, LWVGC website and e-news

CANDIDATE FORUMS AND “EMPTY CHAIR” CHALLENGES

There must be at least two candidates for a candidate forum. When a single candidate is given the platform, it compromises League’s nonpartisan role and may violate federal, state, and/or local laws. League of Women Voters of the United States (LWVUS) guidelines, which can be

found on the LWVUS website at forum.lwv.org/member-resources/article/faqs-candidate-forums-debates, specify that, if only one candidate is participating—a situation referred to as “empty-chair”— a forum for a federal race, such as one for U.S. Congress, must not be held. This is true even if one candidate is running unopposed or if two candidates agree to participate, but only one shows up at the forum. If at least two candidates appear at a forum for a race that has more than two candidates, the forum can go on. For a state or local race, LWVUS strongly recommends that the forum not be held if only one candidate appears. In many instances the same laws apply as in federal races. Therefore, a forum should not be scheduled for an unopposed race, and publicity for a forum should be tentative until at least two candidates agree to appear.

Be aware of how the structure of offices and races may cause an empty chair forum to be presented inadvertently. In a single race to fill multiple at-large seats (as in many city council and school board races) where the same number of candidates are running as there are seats to be filled, these candidates are obviously running unopposed and create an “empty-chair” situation. Also, while a council-at-large position might have many candidates, there may also be a ward council position or an unexpired term created by a vacancy on the ballot at the same time. There may be a temptation to count all candidates for similar positions together, even though, in reality, the races are different.

More information about “empty chair” rules and how Leagues can cope with candidate absences or refusal to participate can be found on the LWVUS website at: forum.lwv.org/member-resources/article/faqs-candidate-forums-debates. (See also page 28.)

VOTER GUIDES—ONLINE AND/OR PRINT

VOTE411.org online Voter Guide

There are no “empty chair” inhibitions for producing a Voter Guide. All candidate are invited to participate and all are entered in the VOTE411.org online Voter Guide. For those who do not respond, the Voter Guide will simply say “Candidate did not respond.” Responses from candidates are uploaded by the candidates themselves and published on a specific date before early voting starts. Candidate responses received after that date are published when they come in. Efforts to get candidate participation can be a challenge. Phone calls from League members, especially members in a candidate’s community, can be a significant incentive.

An online (VOTE411.org) Voter Guide will always be planned as long as there are volunteers to implement it. Chapter responsibilities are to help draft relevant Voter Guide questions and encourage candidate participation. LWVGC has a VOTE411.org coordinator whose committee handles the VOTE411.org software.

Printed Voter Guide

Despite internet dominance, printed Voter Guides are still popular, especially with older voters. Transfer of candidate information from VOTE411.org to a printed platform will require more “off-line” effort, and perhaps expense, for laying out a printed document, but considering the demand, a printed Voter Guide merits serious consideration and budgeting. See page 35 for more information on using VOTE411.org data to create a printed Voter Guide.

For local elections, multiple races can be included in one printed guide with little waste as all races included will be of interest to a common set of voters. For most congressional, statehouse, and county council races, district lines are not congruent creating complications for printing a guide. A separate Voter Guide could be printed for each race individually or one guide could comprise some or all of Cuyahoga County. The LWVGC Voter Service Director and chapters should come together to make these decisions.

3. CANDIDATE FORUMS

EARLY PLANNING—BUDGET, DATE, PLACE, COLLABORATIONS

Here is a basic list of what needs to be discussed, decided, and executed to do a candidate forum. On the pages that follow, you will find details about each item listed to help you make the best plan possible.

- Budget
- Forum date
- Place
- Partnerships
- Volunteers
- Format, rules, and schedule
- Videotaping
- Inviting candidates
- Publicity

Budget

Possible expenses include:

- Postage for candidate mailings
- Site rental and custodian fee
- Sound-system rental and delivery
- Videotaping services
- Printing (programs, table signs, name cards, directional signs, timer cards, etc.)
- Disposable cups and pitchers of water or bottled water (for candidates and moderator)
- Index cards and pencils
- Advance publicity (flyers, paid ads, etc.)
- Other incidental supplies (see page 28 for a sample supply list)

Source of funds

Some chapters will have funds reserved especially for forums; others will have to be creative about keeping costs down. Some venues will provide the space at no cost. An appeal for in-kind or cash contributions can help support the event. Monetary contributions should be made to the LWVGC Education Fund and are tax-deductible for the donor. Chapters that solicit or raise money for their own forums should alert the LWVGC Treasurer to put those funds into the chapter's Education Fund account. Chapters may be able to apply to the LWVGC board for supplemental funding.

Use of the LWVGC Education Fund

Voter service activities may be funded with either operating funds from the LWVGC or tax-deductible monies from the LWVGC Education Fund. When tax-deductible monies are used, Internal Revenue Service regulations must be followed. The LWVGC Treasurer can provide a tax exemption form for purchasing supplies.

Forum date

If possible, set the date about four or five months before Election Day. As soon as you have forum dates, even if tentative, give that information to both the LWVGC Voter Service Director and Chapter Liaison, who will help you avoid significant conflicts.

The Cuyahoga County Board of Elections website (boe.cuyahogacounty.us) will have the following information (see also page 7)

- Date of election
- Early voting schedule
- Filing date schedule for each type of candidate (including write-in candidates)
- When the list of candidates will be final

Date and time considerations:

- Try to set a date before, or shortly after, early voting begins.
- Determine and avoid dates when candidates may be fulfilling official duties (e.g. legislative sessions, city council) and, if possible, dates of other organizations' meetings (e.g., Kiwanis, PTA).
- League sets the date, not the candidate, but consider all candidates' busy schedules.
- Set the best time of day to attract an audience. Most popular are weekday evenings beginning at 7 pm. Saturday afternoons are good for seniors. The number of candidates to be heard may dictate the start time.

Place

Choosing a venue

When choosing a venue, visit the site if you are not already familiar with it. Consider the following:

- ✓ Is there a cost?
- ✓ Is there ample parking?
- ✓ Is the space accessible to persons with disabilities?
- ✓ Is a sound system available?
- ✓ Will facility staff be on hand if power or equipment fails?
- ✓ Can the chairs and tables be arranged as desired?
- ✓ Is there is a podium for moderator's use?

- ✓ Is there a convenient space for a literature and candidate sign-in table (preferably outside of the forum room)?
- ✓ Can coffee/refreshments be served, if desired?

When reserving the venue:

- For flexibility, reserve several possible dates; cancel unneeded ones as soon as possible.
- Understand building opening, closing rules.
- Determine costs for using the venue, if any.
- Provide proof of liability insurance, if required (see below).

Liability insurance

LWVGC carries liability insurance to cover LWVGC events, including all chapter events, in any venue. To obtain a certificate of insurance, notify the LWVGC Treasurer with the following information: name and address of the facility, date of the event, and the name and email or fax number for the contact person at the event location. The certificate of insurance will go directly to the contact person.

Security

If you believe the election or the issues to be discussed might be contentious, plan to have a security person present who can ask an audience member to leave, if necessary. The building where you are meeting may have suggestions about the best way to provide this.

Co-sponsors or partners

Choosing organizations to work with

Collaboration with other organizations can expand the publicity, the audience, and League's reach in the community. However, when taking on forum co-sponsors avoid organizations that make endorsements for candidates, as this would be inconsistent with League's nonpartisan policy. This may be fuzzy when partnering with a newspaper that makes endorsements or with groups that "rate" candidates. Newspapers make a distinction between their editorial page and their news reporting. Organizations that rate candidates may not make specific endorsements. In any case, publicity and the moderator at the event should emphasize League's policy of not endorsing candidates to reassure both candidates and audience that the forum will be conducted in a fair, non-biased manner.

The role of collaborating organizations

Decide the level of collaboration and publicize it accordingly. Organizations more equally involved with finances, organizing, and volunteer hours could be called co-sponsors. Those with more limited roles (e.g., some publicity, financial, or in-kind support) could be called something different, such as "partners." In either case, the League should take the lead in forum organizing, especially in communicating with candidates, and the forum should follow the guidelines set forth in this manual.

Include representatives from co-sponsors who are more equally involved early in the planning to share the workload. Engage them in establishing the ground rules for candidates and for the format of the event.

VOLUNTEERS

Forum night volunteers

Numerous volunteers are needed at the event. Forum tasks, as one-night commitments, are good for engaging new and prospective members. The chapter chair and/or forum chair should be free from a specific job to be available to handle last-minute issues without abandoning a key post. Here are the volunteers needed to work at the event:

- Timers—1 or 2 people
- Question screeners—2 or 3 (or more to work in shifts if multiple races are covered) See more information on page 27 about question screening.
- Literature table—1
- Candidate sign-in table—1 or 2
- Room ushers/runners (passing out cards and pencils for questions)—2 or 3
- Hall ushers (directing patrons and candidates)—1 to 3, depending on venue
- Moderator—1 or 2 (could work in shifts, depending on how many races are covered). As the main person establishing the tone of the forum, choice of moderator is especially important. See more information on page 24 regarding moderators.

Source of volunteers could include:

- Chapter members (especially new and seldom-seen members)
- Collaborating organizations
- High school students
- Scout troops

Forum planning volunteers

Sharing the forum planning can lighten the load and develop future leaders. Create a committee to decide forum rules and format. Any of the described tasks such as, candidate contacts, publicity, venue arrangements, volunteer recruitment, creation of printed materials, etc. can be delegated.

FORUM SCHEDULE, RULES, AND FORMAT

Establishing the rules

The League, together with a co-sponsor, if applicable, should establish the forum rules and format well in advance of the event. The rules should set the tone of the forum and assure decorum, allow the maximum amount of mic time for candidates, and provide voters with an in-person experience with the candidate, not a stand-in.

TYPICAL FORUM RULES

1. We ask candidates and their supporters to refrain from wearing partisan items, such as campaign buttons, inside this room. Campaign materials may be placed on the literature table outside in the lobby.
2. Each candidate must appear in person and at the time slotted for his or her race. No stand-ins are permitted.
3. We ask the audience to avoid expressions of support or opposition to any candidate during the forum proceedings.
4. Each candidate will have *[time allowed]* for an opening statement and *[time allowed]* for a closing statement after a question and answer session. Our timer will give candidates a 30-second warning and a signal when their time has ended. We ask that candidates use one of the table microphones and stand at their place at the table when delivering opening and closing statements.
5. The order of speaking will be determined by drawing lots. The candidate who makes the first opening statement will make the last closing statement *[or lots may be drawn for closing arguments as well]*.
6. Only written questions will be accepted. Cards for writing questions will be distributed to the audience before and during the forum. Succinct questions should be addressed to one or all candidates. Other candidates will have the opportunity to answer a question addressed to only one candidate, if appropriate. Candidates will have *[time allowed]* to answer the questions.
7. League question-screener will review submitted questions to avoid duplication, ensure readability, and avoid inappropriate (e.g. ad hominem attacks) or irrelevant questions (e.g., foreign policy questions for city council races).

Include the rules in the candidates' initial invitation letter. Specifics, such as how many minutes for opening statements and responses, can be determined later and sent in a follow-up letter, when the number of participating candidates is known.

Some chapters print the rules in a printed program so the audience understands the proceedings. The moderator may choose to read the rules before candidates speak.

Establishing the format and schedule

The allotted time of the venue, the number of participating candidates, and the forum format will determine the evening's schedule. If there are many candidates and multiple races, more than one forum may be needed. Often, communities have separate forums for municipal candidates and school board candidates.

Key questions for developing a format:

- ✓ How many races and how many candidates will there be?
- ✓ How many minutes for opening statements and how many, for answers?
- ✓ Will the other candidates get to respond?
- ✓ Will there be closing statements? If so, how many minutes?
- ✓ Can absent candidates send a statement to be read?
- ✓ Will there be a "meet-and-greet" time after the formal program?

The typical format and program schedule used by the LWVGC is:

1. Moderator welcomes audience, explains forum rules, and introduces candidates.
2. Candidates make opening statements of one to five minutes depending on the number of candidates and the overall time available. The order is chosen by lots.
3. A question and answer period where audience members submit written questions and candidates answer within an allowed time, usually 30 seconds to one minute per question. All questions are screened by two or three volunteers before turning them over to the moderator.
4. At a predetermined end time, the moderator calls for all candidates to make closing statement within a time limit. The order will be the reverse of opening statements or determined by lots.

Once a format is designed, prepare a timeline for the event and give it to the moderator.

See page 42 for SAMPLE FORUM TIMING

Other format considerations

LWVGC discourages using a live mic for oral questions, which would require a skilled moderator to exercise control over the appropriateness of questions, timing, and equal treatment of the candidates. Those making questions would also have to be timed. Written questions keep the exchange civil, assure relevance, avoid repetition, and provide the maximum mic time for the candidates.

Cross talk between candidates is desirable. Even when a question is directed to one candidate, the moderator could allow other candidates to answer as well or even allow candidates to address the answer of another candidate. It would be best to discuss these options with the moderator beforehand.

Judicial candidates

A judicial candidate forum needs a different format, as judicial campaigns are more carefully regulated than other campaigns. Judicial candidates may not make statements that could pre-judge a legal controversy, including those involving government policies. If taking questions from an audience, question screeners and the moderator must screen out questions dealing with policies or issues that could be litigated. It is advisable to prepare some safe questions in advance. Consult the LWVO publication “How to Select a Judicial Candidate” for more information on criteria voters should use in electing judges. The full URL is:

my.lwv.org/sites/default/files/leagues/wysiwyg/%5Bcurrent-user%3Aog-user-node%3A1%3Atitle%5D/how_to_select_a_judicial_candidate2.pdf. It may be easier to find the publication through an online search using the phrase “LWVO how to select a judicial candidate.” Also, feel free to consult the LWVGC board or voter service director.

Laws and regulations

LWVGC candidate forums must comply with state and federal election laws as well as IRS regulations. Forums televised on broadcast stations must also comply with FCC regulations. Planners should consult with the LWVGC Voter Service Director or the LWVGC board if there are concerns, but forums that conform to the guidelines set forth in this manual should not be affected. Most common concerns are for “empty chair” forums (see pages 8, 28), videography (see next section), and use of Education Fund tax-deductible dollars (see page 12).

VIDEOTAPING

League policy

Although there is no way to control how audience members use their smartphones, LWVUS discourages unauthorized video, which may violate some election laws (www.lwv.org/league-management/elections-tools/faqs-candidate-forums-debates). LWVGC tries to videotape all forums both to expand opportunities for public viewing and to create a complete record of the night’s proceedings. **Video produced by the League is the property of LWV and per LWVUS guidelines: “Any use of the tapes requires the approval of the LWV with the caveat that it must only be broadcast in its entirety.”** The League must protect video from being edited for use in campaign materials and messaging.

Candidates should be informed in the invitation letter that the forum will be videotaped. These days, most candidates expect forums to be taped.

Video viewing

Video of the entire forum presentation will be uploaded to LWVGC's YouTube Channel (bit.ly/lwvgc-youtube) and be available to those unable to attend the event or who may wish to see it again. This should be publicized and can be announced at the forum.

Many viewers are picked up through VOTE411.org. Remind the LWVGC Voter Service Director or LWVGC's VOTE411 coordinator to alert the LWVUS VOTE411 manager of the forum video. Include the date of the forum, race or issue covered, and web address for the video.

INVITATIONS TO CANDIDATES

The basic content for candidate invitation letters can be summarized as:

- ✓ Who—Invite all approved candidates for races covered in the forum. This includes write-ins; see the note below (on page 19) about write-in candidates.
- ✓ What—Use formal letter and reply form, using LWVGC Education Fund letterhead and envelopes or LWVGC Education Fund logo in e-mail communications.
- ✓ Where—Mail invitations to candidate's official address of record with the board of elections. Emailed invitations should be sent to email addresses provided by the board of elections or on campaign websites. Emails sent to incumbents should not go to their public office email addresses.
- ✓ When—Extend invitations as soon as possible—immediately after candidate filing.
- ✓ Why—Be sure that all candidates understand the League's expectations.

Email vs. snail mail

You can use email to issue your candidate invitations, but you may want to follow up with "snail mail," i.e., regular U.S. Postal Service mail, if you get no response. Some chapters have used certified mail to be sure their invitations were delivered. One chapter chair even hand delivered a letter directly to an elusive candidate! With either email or snail mail, follow-up emails and phone calls are likely to be necessary.

Copy and print your email correspondence with candidates, in case there's a dispute about who knew what when.

Finding candidate contact information

There are several ways to find contact information for candidates:

- Request addresses from the board of elections.
- Search for candidates' campaign websites on the internet.
- Call political party headquarters, as listed in a phone book or on a website.

Write-in candidates:

Someone may show up at the forum claiming to be a write in candidate. Be prepared by checking the board of elections website beforehand for write-in candidates and have a list of those who have qualified. Write-in candidates are also required to file their candidacy by a deadline, which is about ten weeks before the election. For more details about write-in candidates, check with the websites of the Cuyahoga County Board of Elections (boe.cuyahogacounty.us) or Ohio Secretary of State (sos.state.oh.us/elections/#gref).

Creating the letters

Stationery and logo

For U.S. postal letters, a Word template for the LWVGC Education Fund stationery may be available, but it would be best and easier to request stationery from the LWVGC Voter Service Director or Chapter Liaison. LWVGC logos for use in emails are also available. Contact the LWVGC Voter Service Director or Outreach Director.

Multiple mailings

Plan several possible mailings per candidate: 1) initial invitation, 2) follow-up letter with final arrangements, and 3) thank-you letter after the event. Build your budget accordingly, if you expect to use U. S. Postal mail, including return postage for a candidate reply form.

Checklist for initial candidate letter

- ✓ Use LWVGC or LWVGC Ed Fund letterhead stationery and envelopes for U.S. postal mail; include LWVGC logo on email messages
- ✓ Invite and encourage the candidate to participate
- ✓ Name the venue and the address
- ✓ State the date and time
- ✓ Give an email and/or postal address for the candidate's acceptance
- ✓ Give a deadline for responding
- ✓ Identify the Chapter Voter Service Chairperson (or alternative contact) and LWVGC chapter(s) presenting the forum
- ✓ List any co-sponsors or partners
- ✓ Remind them that LWV does not endorse or support candidates or parties
- ✓ Note that the forum will be free and open to the public
- ✓ Provide a brief statement of rules
- ✓ Note that the forum will be videotaped with video to be posted on the internet
- ✓ Encourage participation in the VOTE411.org Voter Guide, to which they will be invited in a separate email

Checklist for follow-up letter to candidates accepting the invitation:

- ✓ Use League stationery for U.S. postal mail; include logo on email
- ✓ Thank candidate for accepting
- ✓ List co-sponsors or partners and LWVGC chapters presenting the forum
- ✓ Note that LWV does not endorse or support candidates or parties
- ✓ Describe the forum format (example: 2-minute opening statement; Q and A with written screened questions; questions presented by moderator)
- ✓ Note the order of appearance of races, including timeline and agenda, if available
- ✓ Provide the venue address and arrival time
- ✓ Provide the rules regarding campaign literature, clothing, and buttons
- ✓ List a contact name/phone/email for questions or concerns

Checklist for follow-up letter to candidates declining invitation

- ✓ Use League stationery (for U.S. postal mail) and logo on email
- ✓ Remind candidate that no substitute or stand-in may appear for a candidate
- ✓ Advise that candidate may submit a statement (with a given time or word limit) to be read to the audience by the forum moderator
- ✓ Provide your contact name/phone/email in case candidate needs to contact you at the last minute

See pages 43-46 for CANDIDATE LETTER TEMPLATES. The invitation letter includes a second page with the rules and a reply form. The reply form can be removed or adapted for email messages. All letters can be customized by filling in the information marked in red font within brackets. Forum organizers wishing to customize the letters using Word documents can request those from the LWVGC Voter Service Director.

Candidate refusal

Because a forum cannot take place if only one candidate is available (see page 8), special effort should be made to encourage candidate attendance. LWVUS advises that there may be ways within the community, through the media, or with coalition partners or others to encourage reluctant candidates to appear. See the LWVUS guidelines at forum.lwv.org/member-resources/article/faqs-candidate-forums-debates.

PUBLICITY

As soon as you have a definite date and responses from candidates, contact the LWVGC Outreach Director and ask her to post the event on the LWVGC website, calendar, social networks accounts, the electronic newsletter, VOTE411.org, and The Voter (printed newsletter). She will need all pertinent details (date, time, place, races, participating candidates, co-sponsors, etc.). She may also be able to help you create a media advisory.

OTHER PUBLICITY IDEAS

Notify the LWVGC Outreach Director for postings to LWVGC internet tools:

- Website
- Social media
- Vote411.org

Consider paid advertising.

- Develop a schedule for ad placements
- Write ad copy & submit per publications' requirements

Schedule and prepare media advisories.

- Use LWVGC or LWVGC Ed Fund letterhead. Use LWVGC logo on email messages.
- Mail or email to news outlets. Determine their publication and deadlines dates.
- Remember weekly or monthly newspapers in your area.
- Send to mayor's office, board of education office, etc.

Submit online calendar postings.

- Sun newspapers, *www.cleveland.com*
- City website
- Any other community calendars available

Request space on outdoor bulletin boards outside of...

- City halls,
- Community centers,
- Schools, etc.).

Prepare and distribute printed flyers.

- Pin to bulletin boards.
- Create a list for distribution points such as senior centers, libraries, recreation centers, merchants, coffee shops, restaurants, schools, places of worship, etc.

Email early notice, plus last-minute reminders, to:

- All candidates
- Officeholders who are not running
- City department heads
- Communications directors for schools, cities, libraries
- Chapter members

Be sure to include co-sponsors and partners in publicity plans. Make sure they have copies of

- Media advisories
- Flyers
- Social media messages
- Any other publicity materials

LATE PREPARATIONS

Room layout

A week or two before the event contact the venue to verify the room layout. Check out locations for:

- The podium and mic
- Table with enough room, chairs, and mics for candidates
- Adequate seating
- Table and chairs for question screeners
- Literature table (preferably outside of the forum room)
- Candidate sign-in table
- Space for videographer
- Need for directional signs

Volunteers

Doublecheck to see if you have enough volunteers. One week prior you still have time to get a few more.

Send a reminder to volunteers telling them where to go, what time to arrive, and what their task is.

Printed materials

You will probably need the following print materials for the forum:

- **Name cards** for each candidate to go on the table in front of each candidate—Be sure to use large bold letters.
- **A printed program** is not essential but useful, especially when there are multiple races. The program should have the order of presentation, approximate times, rules of the forum, a list of co-sponsors, and thank-yous for donated resources (e.g. space)
- **Directional signs**, if needed
- **A “Candidates Sign in Here” stand up display** if the forum is hosting more than two or three candidates.
- **Candidate sign-in sheet**, which should list all candidates for all races covered, with room to indicate the results of drawing lots for opening and closing statements.
- **Timer cards** with “30 seconds” and “Stop.” You can add another sign for 10 to 15 seconds if the timed interval is to be 30 seconds.

Before creating your own signs and name cards, check the LWVGC website for signs and a name cards template that have been uploaded for your use. The signs can be printed directly. The name cards template is a Word document that can be customized.

Candidate sign-in

If you are doing a forum with only a handful of candidates and one or two races, you may not need a candidate sign-in. However, with three or more races and more than two candidates for each race, a candidate sign-in is necessary.

Assign one or two volunteers to the candidate sign table to:

- Keep track of which candidates have, or have not, arrived. (Forum organizers should provide a candidate sign-in sheet—see section above).
- Determine the order of presenting opening and closing statements by having candidates draw lots. (Materials necessary for drawing lots should be provided.)
- Provide name cards to candidates who will place them on the table themselves. (Extra cards and fat markers should be available in case there are omissions or errors.)
- Give a list of candidates who have arrived and the order of opening and closing statements to the moderator.

Supplies

- **Water** is important for the comfort of anyone speaking before a crowd, which includes both the candidates and the moderator. The use of water pitchers and recyclable cups is recommended over bottled water as the latter is a significant environmental concern.
- **League buttons and/or name tags** identifies who is there to help the audience.
- **Voter registration forms** should be provided even if the voter registration deadline is past. There will always be another election.
- **Vote-by-Mail applications** can be used up until three days before the election
- **Index cards and pencils**—the audience will need these to submit written questions during Q&A.
- **Question screening guidelines**—print up a copy of these for the question screeners (See page 27 for more about question screeners).
- **Print material** noted above
- **Miscellaneous**—things like tape, scissors, extra pens, markers, etc. are handy to have

See SAMPLE SUPPLY LIST on page 47. Copy and modify this list to create your own check list for items to pack up and take to the forum

Sales tax exemption. According to IRS regulations, by funding candidate forums from the League's Education Fund, a 501.c3 non-profit organization, you can avoid paying sales tax. The LWVGC Treasurer will provide an exemption certificate. When you submit your expenses to the LWVGC Treasurer, use the reimbursement request form on the LWVGC website under "Member Resources" or get one from the treasurer.

FORUM PROCEEDINGS

Moderator

Recruiting a moderator

Moderator choice is most important. The moderator calibrates the flow of the proceedings and establishes the tone of the event. Sometimes a moderator from a neighboring chapter or community is a good idea, especially if there is controversy in your community. Contact the LWVGC Voter Service Director for names of those with moderator training or experience.

Usually a moderator is selected for:

- Stage presence
- Political neutrality and a sense of fair play
- Tact and a gracious manner while being firm
- Ability to make quick decisions
- Reasonable sense of humor

If appropriate to your scheduling, consider using a member as a moderator-in-training to conduct a portion of the program. League can never have too many able moderators!

Moderator needs

As the moderator is key to the success of the meeting, provide as much help as possible.

Prepare your moderator with the following, in advance of the event date:

- ✓ A detailed time schedule (See page 42 for SAMPLE FORUM TIMING)
- ✓ Rules for the event
- ✓ Correct pronunciation of candidate names
- ✓ A copy of the printed program for the event
- ✓ Salary, duties, and length of term for each office
- ✓ Election hours and any other information about the election itself
- ✓ Forewarning of touchy situations that could arise
- ✓ A recommended script (in digital form so she/he can adapt and print her/his own copy)

Moderator's script

The moderator should adapt or prepare a script for the event that includes the following:

- ✓ A welcome statement that includes her name, the races or issues covered, and names of co-sponsors or partners
- ✓ Thank-yous to any in-kind contributions such as rent-free venue, free videotaping, etc.
- ✓ Information about the League and its nonpartisan role in that the League does not support or endorse any political parties or candidates
- ✓ An invitation to all to pick up an LWV membership brochure at the literature table. (Related to the use of Education Funds, there may be guidelines about membership recruitment at educational programs. Consult the LWVGC board for specifics.)
- ✓ An invitation to pick up election materials at the literature table: printed voters guides (if available), voter registration forms, vote-by-mail applications, and any other materials that may be there (e.g. VOTE411.org bookmarks)
- ✓ A reminder to turn off cell phones and avoid flash photography
- ✓ If applicable, an announcement that the forum is being videotaped in its entirety and that the video will be posted online (LWVGC YouTube Channel)
- ✓ An explanation of the forum rules and format, including time limits for speaking and how to submit questions
- ✓ A reminder to the audience that campaign buttons, shirts etc. are not permitted in the forum room and that they must refrain from expressions of support such as clapping, cheering etc.
- ✓ A reminder to candidates, as they are announced and seated, to place their name cards in front of them on the table and to speak into the mics provided.
- ✓ Time estimates inserted to help keep the forum on track.

See page 48 for SAMPLE MODERATOR SCRIPT

Tips for moderators

1. Treat all candidates the same. Use the titles Mr., Mrs., Ms., Dr., but not mayor, judge, representative, senator, etc. The person is a candidate and not serving the elected position as a candidate. Also, sometimes the candidate may be running for an office different from that he/she holds as an incumbent.
2. Do not use first names, even if you know the candidate well or if the candidate is as young as your grandchildren.
3. Practice pronouncing names repeatedly until they come naturally.

4. Know the total plan for the evening, including issues that may be on the ballot and times allotted for speaking and rebutting.
5. Restate the rules for the forum before candidates start their presentations.
6. Be prepared with information you can read to fill in gaps in time if needed (e.g., information about the League, election dates, important voter deadlines).
7. Keep an eye on the timekeepers for their signals and be firm about time limits. A candidate may finish a sentence, but not a paragraph! This is fair to all candidates and the audience.
8. Keep the guidelines for questions (see below under “Question screening committee”) at hand in case you need to restate them during the forum. (It helps the moderator to have the question guidelines printed somewhere on the printed program to use it for reference during the forum.)
9. In a judicial forum, be aware that different rules apply with respect to questions (see page 17)
10. Test sound equipment prior to the start time to make sure the audience can hear both you and the candidates. Remind the candidates (often) to speak directly into the microphone.
11. Use your microphone (and your outdoor voice) to control a problematic situation.
12. Feel comfortable in omitting questions that are inappropriate and confrontational. Reword questions, as you see fit, even if screeners already have rewritten them.
13. Never offer an opinion on subject matter under discussion.
14. Be firm but friendly, calm, and gracious regardless of what is happening. A smile often cuts through a tense situation. Remember, the moderator is in charge.
15. Be prepared for awkward situations with useful phrases like:
 - a. “We realize that many of you have strong feelings on some of these issues, but the rest of us have come tonight to become better informed by listening to the candidates themselves.”
 - b. “Some of you are already committed to this issue, but many here are not; you do not help your cause by interrupting someone who is talking.”
 - c. “It might be nice to hear more personal views in detail, but we must restrict ourselves to the candidates’ interpretations.”
 - d. “We know some of you have not had your particular question addressed. The screeners combined similar questions of general interest to the audience in the limited time we had. If your question was not answered, please ask your question of the candidate after the forum.”
16. You have the right to adjourn a meeting that becomes unmanageable.

Question screening committee

Question guidelines

A question screening committee of two or three people helps the moderator by weeding out duplicate, overly long, irrelevant, illegible, or hostile questions. It is useful to have instructions and guidelines for candidate questioning printed on the printed program for the audience's benefit.

COMMONLY USED QUESTION GUIDELINES AND INSTRUCTIONS TO THE AUDIENCE

- All questions must be submitted in writing. Cards will be provided; raise your hand to receive a blank card and to turn in your question.
- You may address your question to all or to specific candidate(s) but all candidates may respond if they wish to do so.
- Please make questions short, clear, and legible.
- A screening committee will review all questions to avoid repetition, provide a diversity of topics, and assure appropriateness.
- Questions may be deemed inappropriate if they are not relevant to the office being sought by the candidate or include excessively hostile or offensive language.
- The moderator has complete discretion in the ultimate use and distribution of questions

Suggested set-up and supplies for the question-screening committee

- Table and chairs
- Blank cards for rewriting questions
- Pens
- Paper clips
- Post-its for labeling questions or group of questions

Suggested procedure for question-screener

Screener should use the guidelines presented above as they screen questions. Questions not meeting these standards may either be rewritten or rejected. Forum organizers should copy and print the guidelines above and the suggested procedure below and give these to the screeners, preferably before the forum. The screening process is:

1. For duplication—upon receiving question cards from ushers, sort them according to topics and combine duplicate or related questions. Rewrite when appropriate. Paper-clip the originals together, with the rewritten, or preferred, question on top. Indicate if the question was rewritten. This way the moderator will know, and can let the audience know, which topics generated a lot of questions.
2. Weed out questions that are personal attacks or use profane/offensive language.

3. Rewrite complicated or overly detailed questions. Short questions on different aspects of the same topic are better than one long, involved question.
4. Try to direct about the same number of questions to each candidate. Screeners may suggest to the moderator which questions should be addressed to all candidates, instead of to a single candidate. However, the moderator has complete discretion in directing questions.

Other suggestions

Forum organizers may want to place screeners where their activity is less obvious and assign a runner to take prepared questions from the screeners to the moderator.

When all questions submitted cannot be covered, screeners should turn over those cards to the moderator so he/she can acknowledge the range of questions received.

Sudden “empty chair” situations

As noted above on page 8, a forum for a race cannot go on without at least two candidates present.

If one candidate is late for the forum, the moderator has the prerogative to change the agenda on the spot, moving to a race in which the opposing candidates are all present. The moderator may need to adjust the question-and-answer timing on the spot to accommodate this. If the late candidate arrives after their slot on the program has occurred, the candidate may be invited to meet and greet attendees at the end of the forum.

If a candidate cancels, the moderator should announce the cancellation and state the reasons provided by the candidate.

If a candidate cancels late or does not show for whatever reason, the forum can proceed if there are two or more candidates present for that race, but must be cancelled if only one candidate remains. This action is important both to comply with campaign and IRS laws and to protect the League’s nonpartisan reputation by preventing the forum from turning into a solo candidate appearance, which could seem more like a campaign rally.

Obviously, there is potential embarrassment for the League, if an audience gathers to hear a forum and the nonappearance of a candidate suddenly cancels the event. Forum organizers, and particularly the moderator, need to be prepared for this possibility. The moderator or other organizer must calmly state the League’s high standards for candidate forums and nonpartisanship. Being prepared to announce applicable state or local regulations that do not permit empty-chair forums would be helpful. A letter-to-the-editor of your local newspaper stating the League’s reason for canceling the forum might be a useful follow-up.

More information about “empty chair” rules and how Leagues can cope with candidate absences or refusal to participate can be found on the LWVUS website at:

forum.lwv.org/member-resources/article/faqs-candidate-forums-debates.

4. Ballot Issue Forums

ORGANIZING A BALLOT ISSUE FORUM VS. A CANDIDATE FORUM

The most obvious differences between running a candidate forum vs. an issue forum is that the details regarding candidates are absent. Instructions regarding venue reservation, date selection, most of the budgeting, and a publicity campaign will be the same for issue forums. Volunteer staffing is the same except for candidate sign-in and perhaps timers. Differences will be mainly in format and selection of participants.

ROLE OF LEAGUE POLICY POSITIONS

While the League of Women Voters' nonpartisanship in candidate races is clear and unambiguous, we do often take sides on issues, which can complicate League's presentation of ballot issues.

A League group presenting a forum on ballot issues needs to decide beforehand whether the forum is to have a point of view or if both sides are to be presented equally. If there is no League position, the decision is easy—we strive for all sides to be represented as much as possible.

At a forum to be conducted from the point of view of a League position, the League position should be acknowledged at the forum and the forum costs should be underwritten by the 501.c4, not the Education Fund (see page 12). The LWVGC Education Fund is a 501.c3, tax-exempt organization subject to IRS regulations. Direct political activity (i.e. campaigning for a ballot issue or lobbying elected officials) is restricted for c3s. It is LWVGC policy not to use the Education Fund for any direct political advocacy.

FORUM FORMAT

Issue forums will need a moderator and several panelists to provide broad information and diverse points of view. Panelists can be experts, representatives of campaigns, representatives of relevant governing bodies, and even League members who have developed expertise in the area relevant to the ballot issue. If more than one issue is to be covered in a single forum, be sure that all issues can be covered by your panel.

As in candidate forums, the audience should submit written questions, especially if the issue is controversial. Many audience members would love an opportunity to express their concerns and opinions, but most of the audience wants to hear the panelists. Questions should also go through a screening committee (see page 27). You may want to dispense with timing responses, if the issue(s) appear to be non-controversial and timing would unreasonably restrict the delivery of information.

MODERATOR

Selecting a moderator for an issue forum is just as important a decision as for a candidate forum. However, in an issue forum, it would be best if the moderator had some expertise in, or at least basic knowledge of, the issue being covered.

Most of the moderator tips and script information presented above (see page 24) also apply to an issue forum, with a few differences. The moderator will describe the background and expertise of the panelists in introductions and may give a brief overview of the ballot issue(s) to be discussed.

SELECTING PANELISTS

To present a balanced, unbiased forum, the trick is finding a balanced panel. Especially with a controversial issue, it would be best if two of the panelists represented campaigns working on opposite sides of the issue. On occasion you may have to deal with more than two organized campaigns and will need to use discretion. For example, is the forum going to appear biased with two for and one against? Can you balance that with an expert who does not have a position? You may want to seek the advice of the LWVGC Voter Service Director about your selections.

Sometimes there is little controversy and no organized campaigns, and the audience is simply interested in understanding the issue. For example, municipal or county charter amendments are sometimes “housekeeping” items that may be important for good government, but have few direct consequences to the public. However, voters can be reluctant to vote even for non-controversial issues unless they understand the need for the change.

5. VOTER GUIDE

WHAT IS A VOTER GUIDE?

The Cleveland League of Women Voters, shortly after its founding in 1920, pioneered the forerunner of the modern Voter Guide when it sent objective questionnaires to candidates running for office to provide voters with unbiased, nonpartisan candidate information. Since then the LWV Voter Guide has developed into one of the League’s best known and most popular service to voters across the U.S. in national, state, and local elections. A typical Voter Guide provides:

- Information about the office in the race—length of term, duties, and salary—if any
- Biographical information about the candidate—education, employment, civic engagement, past elective offices, etc.
- Candidate answers to a set of questions—both general and specific to current issues
- Some basic information about how, when, and where to vote

In recent years, the LWV Voter Guide has gone online. LWVUS has created a national website, VOTE411.org, that provides online Voter Guide information across the country. Its online software eases the process for contacting candidates and entering candidate information.

The first step towards creating a Voter Guide is to research the ballot (see Chapter 2), which also must be done for planning candidate forums. The next step is to create questions for the candidates, which should be completed two months before Election Day (see page 34). The bulk of the work begins when candidates start filing petitions to go onto the ballot and League volunteers invite them to participate in the LWV Voter Guide (see page 35).

VOTE411.ORG

LWVUS launched VOTE411.org in October 2006 as a one-stop “go-to” website for all election information, including locally produced Voter Guides. Not all state and local Leagues subscribed to the VOTE411.org Voter Guide service immediately. LWVO and LWVGC began using VOTE411.org in the spring of 2016.

In addition to nonpartisan Voter Guide candidate and issue information, VOTE411.org also provides other national, state-specific, and local election information to the public including:

- Absentee (Vote-by-Mail) ballot instructions
- Ballot issue information (where applicable, as it is in Ohio)
- Early voting options (where applicable, as it is in Ohio)
- Election dates
- General information on such topics as how to watch debates with a critical eye
- ID requirements

- Polling place locations
- Voter registration deadlines
- Voter qualifications
- Voter registration forms
- Voting machines
- Dates for local candidate and issue forums and links to forum videos

Voters visiting the website find their specific, local voting information by entering their address.

VOTER GUIDE QUESTIONS

Who creates the questions

A group of volunteers can work collaboratively to brainstorm topics or issues to be addressed. One person should write up the questions with other volunteers providing feedback and editing. If your League has an observer corps covering public bodies for which there are candidate races on the ballot, members of the corps should be engaged in creating Voter Guide questions as they are most familiar with the public body, its workings, and recent issues.

What and how many questions

The questions should cover a broad range of issues and attempt to reflect the most likely interests of the electorate. Some generic questions that are good for almost any Voter Guide include:

What do you see as the *[main/two/three/four]* issues facing *[name of community or governed entity]*? What are your priorities for addressing those issues?

Why do you want to serve on the *[name of governing body]*? What skills and qualities do you bring to the table?

To get a good response from candidates, it is important to have a questionnaire of reasonable length and fair questions. Three to five questions are best. Too many questions may put off candidates, who are likely to receive many questionnaires. Furthermore, if a printed guide is planned, space constraints will limit the number of questions that can be printed to two or three.

Creating unbiased questions

Great care must be taken to keep bias out of the questions. While League has definite stances on certain policy issues, those positions must be put aside when creating questions. Biased questions can fail to elicit honest responses or may discourage a candidate from responding. Those creating questions must keep in mind that for the Voter Guide to be of real value to voters, the questions should reveal the candidate's thinking, not attempt to influence it.

Here are three helpful websites for creating unbiased questions. These sources provide clear guidelines and examples of both bad and good questions. The last link is from the LWVUS website.

- www.surveymonkey.com/mp/5-common-survey-mistakes-ruin-your-data/
- simplyeducate.me/2015/02/08/qualitative-interviewing-3-mistakes-to-avoid-in-question-formulation/
- www.lwv.org/league-management/elections-tools/new-guide-are-your-voters-guide-questions-unbiased-you-think

Briefly, the main problems with question bias include:

- **Leading questions** that tend to put words into the interviewee's mouth: "Do you think it is important to reduce the role money plays in American elections?" (See the LWVUS site above.) The preferred question would be "Please explain why you do, or do not, think it is important to reduce the role of money in American elections."
- **Loaded questions** that use strong or emotional terminology: "What is your opinion of waste, fraud, and abuse?" Preferred is: "Do you think that our city does, or does not, operate efficiently? Please explain your answer."
- **Predisposing questions or questions with underlying assumptions**: "How do you think fracking should be regulated?" There is a clear assumption here that fracking should be regulated. Not all candidates will believe so. Preferred question is: "What is your opinion about regulations in the fracking industry?"
- **Double-barreled questions** that ask two different things at once: "Would universal preschool education help address the achievement gap and problems of concentrated poverty." This question should be broken in two, one that focuses on the achievement gap and a second on concentrated poverty. While the two issues may be related, they are not the same and a candidate may have differing nuances regarding each.
- **Overly complicated questions** that use initialisms and jargon: "What is your opinion of our district's services for students with IEPs?" Better would be: "What is your opinion of our district's services for a special education student with an Individualized Education Plan, or IEP?"
- **Opening a question with a statement** can complicate the question. Unless really needed for clarification, an opening statement runs the risk of setting up a leading question. Many of the "bad" questions shown in the LWVUS document (third link above) demonstrate this. For example: "In light of the high gun-related deaths in our state and the fact that nearly 75 percent of residents support common sense gun laws, would you support changing the laws to limit the availability of semi-automatic assault weapons and expanding background checks?" Better wording would be: "What new gun laws or changes to existing gun laws in our state would you support or oppose?"

SAMPLE VOTER GUIDE QUESTIONS

Sample questions for board of education candidates

1. What do you see as the (main/two/three/four) issues facing *[name of school district]*?
What are your priorities for addressing those issues?
2. What experience and knowledge base do you have that will make you an effective leader on the board of education?
3. What do you think is a board member's role in relation to curriculum and curriculum development?
4. What ideas do you have for using tax dollars as efficiently as possible?
5. What do you think the board can do to promote the academic standards of the district?

Sample questions for city council or board of education candidates:

1. What are your priorities for developing a budget for the school district/city?
2. What do you see as the three most important issues facing our city/schools in the coming four years and what would be your recommendations for city council/board action?
3. Are there programs implemented in other communities that you would like to see happen in our local schools?

Sample questions for city council:

1. What, if anything, do you think the city should do with the recent decline in state revenues to local municipalities?
2. What is your view of regionalization and collaborative arrangements with adjoining cities?
3. What is your vision of what our city should be like in ten years?
4. What issues do you think are most important to citizens in your ward?
5. What is your opinion on contracting out city services?

How and when to send questions to candidates

Candidate questions go to the VOTE411.org coordinator, who will see that they are delivered to candidates through VOTE411.org. Questions should be sent to the coordinator about 60 days before Election Day to allow time for uploading and sending questions to candidates well before early voting begins.

CONTACTING CANDIDATES

Initial Voter Guide invitation

LWVGC has VOTE411 volunteers who make the initial contact inviting candidates to participate in VOTE411.org, LWV's online Voter Guide. After the Cuyahoga County Board of Elections verifies the petitions that candidates must file to run in any primary or General Election, the VOTE411 volunteers contact all candidates for public office in the county via emails created and sent from VOTE411.org (the sender of these emails is identified as "League of Women Voters of Greater Cleveland"). The email asks for candidates' biographical information and their answers to the League's questions (see previous section on Voter Guide Questions page 32).

VOTE411.org allows the League to send different questions to candidates for every office in every community. Using a link in the email, a candidate can upload a biography, a photo, and answers to the questions. Candidates are given a character limit for their answers and a deadline to submit their information. Once a candidate responds, VOTE411 volunteers read the candidate's submission to make sure it is not over the character limit; the answers are not edited in any way (so far, we have not had to cut any salacious or potentially libelous material).

Follow-up to candidates not responding

VOTE411.org also includes templates for following up with candidates who do not respond by the deadline. A candidate who has not responded by the time early voting starts (30 days before an election) should be contacted by telephone—preferably by a League member who lives in the candidate's community. A personal call from a constituent often spurs a candidate to respond. An LWVGC VOTE411 volunteer will send a list of non-responders to the LWVGC board and chapter chairs so volunteers can be lined up to make phone calls.

Publishing candidate responses

All responses received shortly after our deadline are published at the same time. Once published, voters can access information about candidates on the Vote411.org website. Late submissions will be published as soon as they are reviewed.

PRINTED VOTER GUIDE

VOTE411.org technology enables LWVGC to provide an online Voter Guide that serves all municipalities in Cuyahoga County, even where there is no LWVGC chapter. Nevertheless, as noted in Chapter Two, there is still a demand for printed guides. So, here are instructions on how local chapters and communities can use VOTE411.org data to create a printed guide.

Of course, expense and budgeting would have to be part of the decision to create a printed guide.

VOTE411.org data

Candidate data, including answers to questions, as well as ballot issue information, can be downloaded from Vote411.org in a spreadsheet format. If you are interested in doing a printed Voter Guide for your community, ask the LWVGC Voter Service Director or the VOTE411 coordinator to download for you the data for the races and ballot issues to be included in your guide. You can then convert the spreadsheet data into something printable. You would have to decide whether to create something very simple in a Word document or something more sophisticated using graphics software. For the latter, it may be necessary to recruit or hire a graphics expert to do the layout.

Proofreading your Voter Guide

Have one or more proofreaders review your Voter Guide before printing. Be especially careful that candidate names are spelled correctly. Corrections on typos, misspellings, etc. can be made on everything except the candidate's answers. Those must be kept as is.

What else to include in a Voter Guide

All guides should be identified as published by the LWV of Greater Cleveland and any chapters involved. Remember to include information on ballot issues (see page 36).

Many of the items listed as being available online at VOTE411.org (see page 31) could be also included in a printed guide, although space is a premium with print publications and priorities must be made. Some of the more essential items include:

- ✓ Dates and times for the voter registration deadline, early voting, vote-by-mail deadlines, and Election Day
- ✓ Voter ID requirements
- ✓ Instructions on how to vote by mail
- ✓ Dates and times for candidate and/or issue forums
- ✓ Web addresses where voters can find more information such as those for the board of elections, Ohio Secretary of State, LWVGC, and, of course, VOTE411.org

For advice and relevant information, ask the LWVGC Voter Service Director, who may have prepared material that can be used in all printed guides published by LWVGC.

PRESENTING BALLOT ISSUES IN A VOTER GUIDE

The Voter Guide and League positions

In a Voter Guide, the League never expresses a stance on a position. Any positions taken by the League on ballot issues are published in a separate endorsement document. In presenting information on an issue in a Voter Guide, League attempts to be as balanced as possible. How to do this is explained below.

Voter Guide information for ballot issues

If you do not have the resources (i.e., no time and no volunteers) to do the research, just include the ballot language. If it is on the ballot, it should be in the Voter Guide in some form.

If doing the research is possible, voters greatly appreciate League's help with understanding issues. Typically, League provides two types of information for ballot issues: "Plain-speak" and pros and cons

Plain-speak

Ballot language can be arcane, especially for charter amendments, but even language for citizen initiatives can be poorly worded for a variety of reasons, including intentional obfuscation.

The idea of "plain-speak" is to explain to the voter in simple English what the issue is intended to do if passed. Plain speak, for example, could include explanation of different types of tax issues (e.g., bond issues vs. levies, capital vs. operating).

To obtain explanatory language, you can ask other League members who have developed expertise, government officials who created the ballot issue, or other experts. An online search can be productive, but take care to use only trustworthy online sources.

Pros and cons

Pros and cons may be found in newspaper editorials or op-eds, from campaigns for and against the issue, League members with expertise, and internet search engines. Again, be certain you can trust any online source you use. You may want to cite the sources of your information, especially if the pros and cons come from campaign language.

Publishing ballot issue information in a Voter Guide

Ballot issue information for a Voter Guide is provided by LWVO for statewide issues and by the LWVGC board for county-wide issues. Ballot information on local municipal and school district issues, which voters often appreciate, can be provided by League chapters or a local community League volunteer. If the ballot issue research has been done and Voter Guide information created (i.e., plain speak, pros and cons), send that information to the LWVGC VOTE411.org coordinator for online publication.

6. After the Election

After the busy months leading up to an election, it's easy to overlook the need to do important follow-up tasks for a candidate forum, issue forum, or Voter Guide. These tasks are to...

EXPRESS THANKS

To candidates

By letter or email, be sure to thank each candidate for participating in your forum and/or Voter Guide. Add any information about the availability of forum video or printed material, as applicable.

To other participants

In addition to expressing thanks at the forum, recognize and thank your organizers, co-sponsors, donors, panelists, volunteers, and others by email, snail mail, and/or in a League or community publication or letter to the editor. The League of Women Voters depends greatly on its volunteers, whose only payment will be recognition and thanks. To maintain and generate enthusiasm and future participation, making that "payment" is vital.

EVALUATE

Evaluation of election activities would make a good chapter meeting subject following the election. At these sessions, those who were deeply involved in the planning can gain valuable insights from those who were observing at arm's length. Also, the discussion can be educational for new members who are just learning League ways. Often, the LWVGC Voter Service Director will organize a post-election voter service "debriefing" and invite all chapters to participate. Those sessions offer an opportunity for chapters to learn from each other and hear new ideas.

Ideas of what you may want to examine about your voter education efforts include:

- **Candidate participation** – Did you have good candidate participation? If not, do you have some ideas to improve participation? If yes, to what do you credit the success?
- **Collaborators** – How well did collaboration work? What level of engagement and how much help did collaborators provide? Could or should you have more or fewer co-sponsors or partners in the future?
- **Expenses**—Were expenses reasonable? Can you identify areas where you could have saved money? Most important, will you need to do fundraising to support future forums and Voter Guides?
- **New member development**—Were you able to use the forum and Voter Guide to both recruit and engage new members? How involved were members? Did your organizing develop future leaders, or just limited commitments?

- **Ballot issues**—Were you able to provide good information on ballot issues in your community? Were you able to tell if the information was useful to voters?
- **Forum attendance** –About how many people came? How diverse was the audience? Do you have ideas for improved publicity? Was the date and time well chosen?
- **Forum venue** – Could the audience hear the proceedings well? Was the room size appropriate for the audience size? Were there any problems specific to the venue? Would you use the site again?
- **Video** – Do you know how many views the forum video had? This statistic can be found on the YouTube site or you can ask the LWVGC Outreach Director for that information. Also, the outreach director should be able to ascertain whether viewers were directed from other websites. Could you improve publicity or accessibility of the video.
- **VOTE411** – Do you feel that VOTE411.org served your community well? Do you have any feedback for LWVUS about the website? LWVUS has the ability to make changes, as it owns the software.
- **Printed Voter Guide** – If you printed a guide, how many did you print and how many were distributed? Did you have enough to meet demand?

You may have other problems or opportunities that warrant further questions. Remember that the purpose of evaluation is to help you improve delivery of voter service to your particular community.

ORGANIZE AND STASH YOUR RECORDS

This is the time to record and establish your procedures for future forums and Voter Guides in your community, so that the details do not have to be redesigned every year. Organize and file important notes, copies of your candidate invitations and other correspondence, volunteer instructions, printed forum programs, other print material, a copy of the Voter Guide, notes from evaluation sessions, and so forth. Without the collective wisdom of many chapters and League volunteers who, after having organized many forums and Voter Guides, saved their notes, letters, scripts, etc. for use in subsequent years, this toolkit could never have been produced.

ADDENDA

Includes:

Election cycles in Ohio and Cuyahoga County

Sample candidate forum timing

Invitation letter template with rules and reply form included

Follow-up letter template

Thank you letter template

Sample forum supply list

Sample moderator script

ELECTION CYCLES IN OHIO AND CUYAHOGA COUNTY

Presidential Elections are in even numbered years, divisible by four (e.g., 2020, 2024, etc.)

- President/Vice President of the United States (4-year term)
- U.S. Senator (upon expiration of 6-year term)
- Congressional Representatives (2-year term)
- State Senators (even-numbered districts; 4-year terms)
- State Representatives (2-year terms)
- State Board of Education Districts 1, 5, 6, 9, 10, and 11 (4-year terms)
- Cuyahoga County Council (even-numbered districts; 4-year terms)

Local Elections are in odd-numbered years

- Municipal officials (4-year terms, may be staggered)
- Township officials (4-year terms, staggered)
- Members of local boards of education (4-year terms, staggered)

Midterm Elections are in even numbered years when there is no presidential election

- U.S. Senator (upon expiration of 6-year term)
- Congressional Representatives (2-year terms)
- Governor/Lieutenant Governor (4-year term)*
- Secretary of State (4-year term)*
- State Treasurer (4-year term)*
- State Auditor (4-year term)*
- Attorney General (4-year term)*
- State Senators (odd-numbered districts; 4-year term)
- State Representatives (2-year terms)
- State Board of Education Districts 2, 3, 4, 7, and 8 (4-year terms)
- Cuyahoga County Executive (4-year term)
- Cuyahoga County Council (odd-numbered districts; 4-year terms)

*Note that, all non-judicial statewide offices are elected in the midterm elections.

Judges and Supreme Court Justices – (6-year terms)

- Municipal judges are elected in odd years.
- All others are elected in even years. Terms are staggered so that every two years two supreme court justices are elected. Every six years the Chief Justice is elected.

SAMPLE CANDIDATE FORUM TIMING

Announced time for meeting: 6:45 – 8:45 pm*

- 6:45 Welcome & description of format
- 6:47 Introduce school board candidates (example is 3 candidates)
- 6:49 Opening remarks – candidate #1 –2 min
- 6:51 Opening remarks-candidate #2 – 2 min
- 6:53 Opening remarks- candidate #3 – 2 min
- 6:55 Questions by moderator: 2q x 3 candidates x 2 min.
- 7:07 Questions from audience: 6q x 3 candidates x 1 min.
- 7:25 Closing statements: 3 candidates x 1 min
- 7:28 Introduce candidates for ward positions (example is 6 candidates, 2 for each of 3 wards)
- 7:29 Opening statements by ward 1 = 2 candidates x 2 min. each
- 7:32 Opening – ward 2 = 2 x 2
- 7:36 Opening – ward 3 = 2 x 2
- 7:38 Moderator questions to candidates: 2 q x 6 candidates x 1 min.
- 7:50 Audience questions to candidates: 6 q x 6 candidates x 1 min.
- 8:26 Closing remarks by candidates 6 x 1 min.
- 8:32 Moderator closing remarks

* Meeting was planned to end at least 15 minutes before site closing time so volunteers had enough time to collect materials and clean up room as required.

Note: The above schedule is provided as a general planning guideline and would need adjustments if the number of races and/or the number of candidates varies from this model. This schedule also does not fully account for the time needed for moderator to read questions aloud, for people movement on/off stage and to microphones or other situations that use the meeting time.

INVITATION LETTER TEMPLATE WITH RULES AND REPLY FORM INCLUDED



[candidate name]
[candidate address]
[date of letter]

Dear [candidate name]:

The *[chapter name(s)]* Chapter(s) of the League of Women Voters of Greater Cleveland *[and name of co-sponsor, if applicable]* will host a **candidate forum on *[day of week, month, day]* at the *[location], [address]*.**

We invite you to participate as a candidate in the *[name of office]* race at our *[date]* forum. The *[name of office(s)]* races will also be presented at this event. We will send you an agenda with the order of presentation and approximate times closer to the forum date. *[last two sentences for forums covering multiple races]*

The candidate forum gives voters an opportunity to hear candidates discuss issues important to them in this election. The candidates will answer written questions from the public during the forum.

We will videotape the forum and post complete videos on the LWVGC YouTube channel with links from our website at lwggreatercleveland.org. *[sentence can be dropped if there will be no video]*

The League of Women Voters of Greater Cleveland is a nonpartisan organization dedicated to informing the public about our election process and the individuals who are asking to represent us in government. We do not support or oppose candidates or political parties. We advocate for policies and issues that support good government. League-sponsored candidate forums follow League procedural rules, which are attached.

We hope you will join us in this valuable voter education endeavor.

Please confirm your participation by *[date]* by email or use the enclosed reply form.

In addition, I urge you to respond to the questionnaire you will receive shortly from VOTE411.org, a website sponsored by the League of Women Voters for creating an online Voter Guide. Many citizens access this web-based resource to understand candidates and make informed decisions. This information will also be published in a printed Voter Guide. *[Use last sentence if printed guide is planned; provide more details if applicable.]*

Please do not hesitate to contact me if you have any questions about the candidate forum.

Sincerely,

*[League volunteer name, position,
phone, email]*



**Procedural Rules for
Candidates Night [date, time] [location]**

Presented by [chapter names] Chapters of the League of Women Voters of Greater Cleveland

1. No substitute or stand-in may appear for a candidate. If unable to attend the forum, a candidate may submit a statement [time or word limit] to be read to the audience by the forum moderator.
2. Please arrive at [place] no later than [time] and sign in at the candidate sign-in table. We will do a coin toss or draw lots to establish which candidate speaks first.
3. We will start promptly at [time] with a welcome and introductions followed by instructions by the forum moderator to the candidates and audience.
4. Each candidate will be allowed a(n) [time allowed] introductory statement. We ask candidates to make their statements from the table. The forum will be videotaped in its entirety and posted on the LWVGC YouTube channel with links from the LWVGC website.
5. Audience members submit written questions to be used by the moderator. Questions will be screened – not to block opinions or skew information, but to avoid duplication, provide a diversity of topics, and ensure clarity and appropriateness (e.g., state offices are not responsible for snow plowing). Audience members may direct their questions to one or all candidates.
6. Responses to the answers shall not exceed [time allowed].
7. Tables will be available in the lobby for candidate literature. We ask that no campaign material including literature, buttons, t-shirts, etc., be brought into the forum room.

REPLY FORM

May we please have a written acknowledgment of your agreement to participate? Please tear off and return the form below to me by [date].

Check one:

Yes, I would like to participate in the candidate forum for [name of race] on [forum date]

No, I am unable to participate in the candidate forum for [name of race] on [forum date]

Name _____

Address _____

Preferred phone number (for our use only) _____

Preferred email address (for our use only) _____

Signed _____

FOLOW-UP LETTER TEMPLATE



[Candidate name]

[Street address]

[City, State, Zip]

[Date]

Dear *[name of candidate]*

On behalf of the *[name of chapter(s)]* chapter(s) of the League of Women Voters of Greater Cleveland, I would like to thank you for agreeing to participate in our candidate forum on *[date, time]* at *[place]*. Both *[or number of]* candidates for *[name of race]* have agreed to participate. This forum is free and open to the public. We remind you that this is a nonpartisan event. The League of Women Voters does not endorse or support any candidates for office.

The candidates will appear in the following order: *[list races in order of presentation]*. Please plan to arrive at least 30 minutes before the scheduled time and check in at the candidate sign-in table at *[sign-in location]*.

The format is as follows: *[inclusion is optional if rules already sent to candidate, but should be included if the candidate has not yet received time limits]*

- Candidates will appear on the stage together and be introduced by the forum moderator.
- Each candidate will be allowed *[number of]* minutes for an opening statement, followed by questions from the audience. The audience will submit written questions, which will be screened for duplication, and asked by the moderator to the candidates.
- Each candidate will be allowed *[number of]* minutes to answer a question. Questions may be directed to one or to both candidates; each candidate may answer a question that is directed to another candidate.
- Time limits will be enforced; candidates will receive a *[30 or 15]*-second warning and a signal when time has expired.
- After the Q&A, each candidate will have *[number of]* minutes to make closing remarks.
- No substitute or stand-in may appear for a candidate. A candidate unable to attend the forum may submit a statement up to *[number of minutes or word count]* in length, which will be read to the audience by the moderator.

No campaign material or literature will be allowed in the forum room during the event, but a table for displaying and distributing campaign material will be available outside of the forum room.

Thank you for agreeing to be a part of this informative, exciting event.

[name], Chair, *[name of chapter]* Chapter

THANK YOU LETTER TEMPLATE



[Candidate name]

[Street address]

[City, State, Zip]

[date]

Dear *[candidate name]*,

Thank you for participating in the *[chapter name]* candidate forum on *[date]*. We appreciate your preparation and your willingness to present your knowledge of the position you are seeking. Your support helped make the forum successful.

Video of the forum is now available on the LWVGC YouTube Channel at bit.ly/lwvgc-youtube.

Sincerely,

[name]

[League position]

[name of chapter]

SAMPLE FORUM SUPPLY LIST

Use the following list to create your own check list for items to pack up and take to the forum

For the literature table:

- Printed Voter Guide, if available
- Any election information materials such as VOTE 411 cards, Judge4Yourself cards, etc.
- League membership forms
- Voter registration cards
- Vote-by-mail applications
- Printed programs
- Sign-up for League e-newsletter (for nonmembers who want to receive League news)
- League table runner

For candidate sign-in (if needed):

- “Candidate Sign-in Here” sign
- Sign-in sheets for candidates with candidates listed and boxes to note speaking order
- Materials for candidates to draw lots on speaking order (or a quarter for a coin toss)
- Name cards for candidates to place on the table to identify them
- Extra cards and markers in case a name card is missing or has a mistake

Site needs:

- Directional signs
- League banner for podium or standing banner

Proceedings needs:

- Printed programs
- Print out of screening guidelines for question screeners
- Timer’s sign cards (“30 seconds”/ “15 seconds”/ “Stop”)
- Smartphone or stopwatch for timing
- Water for candidates—disposable cups and pitchers or bottled water
- Index cards and pencils for questions

For volunteers:

- Name tags
- League buttons and/or t-shirts

Miscellaneous good-to-have-on-hand items

- Tape
- Scissors
- Markers, pens
- Rubber bands, safety pins, paper clips, post-its

SAMPLE MODERATOR SCRIPT

This script can be adapted by adding the correct information in place of bracket text in red font and expanding the script to include all races and candidate names and any other important information

Welcome 7:00 pm

Good evening, my name is *[name of moderator]* and I will be your moderator for this event. Welcome to the League of Women Voters candidate forum for candidates running for *[names of offices]*.

We are co-sponsoring this event with *[names of partnering organizations]*.

We thank *[name of venue proprietor]* for this excellent space *[if gratis]* and *[entity/person]* for *[other donated service or item]*.

The League of Women Voters is a nonpartisan political organization, which means we do not support candidates or political parties. We can, however, take positions on issues when they can be based on League studies.

The work that the League does is made possible by member dues and donations and the dedication of League volunteers. If you are not a member, we encourage you to join. Membership forms can be found in the lobby or at our website lwvgreatercleveland.org

On the literature table in the lobby you can pick up a printed Voter Guide, as well as voter registration cards and vote-by-mail applications. *[Add other relevant voting information pieces, e.g. Judge4Yourself cards.]* The Voter Guide along with other important election information can also be found online at VOTE411.org.

7:07 Rules

Before we begin tonight's forum, let's review the rules:

[these can be modified if not in agreement with the rules decided]

- We ask candidates and their supporters to refrain from wearing partisan items, such as campaign buttons, inside this room. Campaign materials may be placed on the literature table outside in the lobby.
- Each candidate must appear in person and at the time slotted for his or her race. No stand-ins are permitted.
- Each candidate will have *[time allowed]* minutes for an opening statement and one minute for a closing statement after a question and answer session. Time limits will be strictly enforced. Our timer will give candidates a *[30 or 15]*-second warning and a signal when their time has ended. To keep things moving we also ask that candidates use one of the table mics and stand at their place at the table when delivering opening and closing statements.
- Only written questions will be accepted. Succinct questions should be addressed to one candidate. Other candidates will have the opportunity to answer if appropriate. Please raise your hand to receive a card on which to write your question, or to turn in a card. Candidates they will have *[time allowed]* minute to respond.

[if using a live mic, direct the audience to the microphone and remind them of the time limit and omit the next item re screeners.]

- League screeners will review submitted questions in order to avoid duplication, provide a diversity of questions, and ensure readability and appropriateness.

Finally, we ask the cooperation of the audience in avoiding expressions of support or opposition to any candidate during the presentation time or answers to questions. This only takes time away from the candidates and time is precious this evening.

7:15 First group of candidates

Our first group of candidates is running for *[name of office]*. Candidates please take your seats at the table. *[Number of]* candidates are running for a *[number]*-year term with an annual salary of *[\$ amount]*. *[If this is a race with multiple seats to be filled, include information on how many seats are to be filled.]*

The candidates are: *[names of candidates]*

Candidates, please be sure to display your name cards.

Audience, please remember to raise your hand to get a card for writing a question directed to a candidate, or to submit your written question.

Candidates, you have *[time allowed]* minutes for your opening statements. Candidates have drawn numbers to determine the order in which they speak. We will begin with M. *[name of first candidate]*

7:22 [Q&A]

For the question-and-answer period, I remind the candidates to please stay within the allotted time limit of *[time allowed]* for each response.

[Closing statements 7:45 pm

Each candidate will now have one minute for a closing statement. We will begin with M. *[name of first candidate]*

[follow format for each candidate]

This concludes our time for the *[name of office]* race. Candidates, thank you for coming this evening

7:50 pm Second group of candidates

Our second group of candidates is running for *[name of office]*.

[follow format above to proceed through the remaining races]

8:55 parting remarks

This concludes our Candidates Night for *[year or election date]*. I would like to thank all of our volunteers who made this evening possible and to thank all of you for attending. Don't forget to pick up a Voter Guide and look at the candidates' literature and other election materials if you haven't already done so.

Most important, don't forget to vote on or by *[election date]*. Good night everyone.

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