

Citizen Education

A Voters Service Handbook

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Introduction: What is in This Handbook

When voters think of the League of Women Voters, it is usually voter service activities that they have in mind: League members registering voters, moderating candidate forums, helping people to understand all sides of the issues, simplifying the complexities of registering, voting, and running for office. Voters see the League as the most dependable source of objective, factual information on the candidates, the issues, and the voting process itself.

Since 1920 the League has used voter service as the central feature of its citizen education mission, and these activities have helped the League to attract attention, membership, and community support.

This handbook is designed to guide local League boards and voter service leaders in developing and carrying out the diverse activities that League calls voter service. It also contains material to help non-League organizations to provide their own successful voter information activities. The material is arranged as a resource manual according to categories of activities. The appendices include sample forms and additional information arranged in ways to make it more useful to you. Users of this resource are invited to comment and make recommendations for revisions based on their experience using it.

The handbook is inclusive. Don't think that you must do everything in it. Be guided by your League's community service goals and the resources available to you. It makes more sense to select carefully what you can do well than to spread your resources too thinly and be left with regrets about the quality of your work.

Enjoy yourself! While voter service is demanding, it is also a deeply satisfying League activity.

Getting Started

Getting Started Checklist

- Review board policies and set priorities for the year.
- Review voter service budget
- Prepare a master calendar, events calendars, and timelines.
- Research recent changes in election and voting law and regulations.
- Do background research on the nature of the coming election(s).
- Recruit committee and crew.
- Schedule training workshops.
- Maintain strong emphasis on League nonpartisanship.

Defining the Job

Voter service is the term League uses for its nonpartisan voter information and engagement activities, including such things as voter registration, candidate interviews and forums, ballot measure debates and presentations, Pro & Con publications, voter guides, get-out-the vote campaigns, etc.

League activities also involve the development and/or updating of policy positions and advocacy based on these positions. During the election season, Leagues are usually active in both voter service and action on policy positions. To protect the League's nonpartisan status and its reputation, we must be careful to keep the two areas, and the League members involved in them, separate and distinct.

Keeping voter service and advocacy separate is a delicate balancing act. Voter service workers should be thoroughly prepared to answer questions from voters who have trouble understanding how the League can be nonpartisan while working heart and soul to pass a measure on the ballot. Part of board training should be a careful airing of these issues and discussion of the strategies for handling challenges to our nonpartisan claims.

Throughout the year LWV California and LWVUS will send memos to local Leagues in the LWVC UPDATE and LWVUS Update. They will contain news of statutory and regulatory changes, updates on state or national League efforts, and examples and tips to help you do your job.

You should feel free to call on your county League, LWVC, or LWVUS for support and advice. That's what they're there for. Their familiarity with the problems you are facing can save you time and grief.

The Role of the Board

The definition of voter service in each local League begins with the board. Each board must begin its term with a process that identifies some broad goals and priorities for the year. It is also a time to review local League policies. Those relating to voter service should be, for example, League's nonpartisan policies, the conditions governing League co-sponsorship of candidate events with other groups, and the services for which League will charge a fee.

In the goal-setting process, the voter service leaders should review with the board what the year holds, what elections are expected, and what issues are of particular concern, such as a low voter turnout in recent elections, low registration levels of local youth or underserved communities, or a particularly complex or divisive issue heading for the ballot.

Each board member should understand how voter service relates to her or his portfolio:

The action director can provide "hot tips" about the political scene and help prevent potentially embarrassing situations.

The membership director and/or nominating committee chair can help to recruit the voter service committee and crew members and can also include voter service events in the League's membership development program.

The communications director will be responsible for notifying the public about voter service events and ensuring that the League of Women Voters is given credit for its part in voter information and engagement projects. All the various media outlets—press, radio, television, newsletters, social media—should be considered.

The finance and/or the development director can seek funding for voter service projects.

The VOTER editor keeps the membership apprised of opportunities to work on voter service projects as well as to attend them, and later should report voter service accomplishments to the members.

The voter service director should oversee the preparation, ordering, and distribution of various written and taped materials. She or he, and the membership director, should see to it that these and other League publications are available at all voter service events.

Nonpartisan Policy

Leagues do not support or oppose candidates or political parties. All voter service projects must be organized and staffed with League's nonpartisan status and commitment in mind. But avoid

the use of the word “nonpartisan.” The word is confusing. Simply say “The League does not support or oppose candidates or political parties.”

Leagues at all levels devote a considerable amount of time to clarifying the definition and application of their nonpartisan policies, a task that never ends. Your board must have a policy to guide your activities and should review it at the beginning of each League year. Please consult and review your League’s nonpartisan policy as you begin planning for voter service activities.

As you staff your candidate forums, Pros and Cons presentations, or any other speaking engagement, consider the League’s nonpartisan policy. The outside political activities of potential moderators, question sorters, presenters, and even time keepers must be considered in determining who takes one of those roles in a particular event. Specifically, people who serve as moderators, interviewers, question sorters, etc. should have no connection with the candidates or issues that are the focus of the event. In some instances, if it is possible and practicable, it might be best to choose people who live outside of the district or jurisdiction where the election is located.

Voter service workers need to be prepared to answer questions and challenges about the League's activities. Review the League's nonpartisan policies and rehearse a statement about what voter service is and is not. If the League is engaged in any advocacy activities for the election at the state or local level, voter service workers need to know what they are and how to explain the difference between League's voter service and action programs.

Changes in the Laws relating to Voter Registration and Elections

The laws governing voter registration and the running of elections are amended from time to time. It is important to understand the changes because they will change the information offered during voter service activities. The following are examples of such changes.

Voters Choice Act

Approved by California lawmakers in 2016, the Voter’s Choice Act (VCA) expands voters’ options for how, when and where they cast their ballots. Beginning in 2018, all registered voters in participating counties will be mailed a ballot and have the option to return it by mail, place it in a secure drop box, or take it to a “vote center.” Voters also will be able to vote in person (a) at “vote centers,” which will replace polling places and which can offer replacement ballots and other services that can be found in any polling place or (b) in the county elections office. Vote centers will be open for early voting from the Saturday before Election Day through Election Day. Some vote centers will be open two weekends before Election Day or for a full eleven days before the election.

Starting in 2020 all counties in the state have the option to adopt the use of vote centers. County governing bodies, usually the county boards of supervisors, make the decision to shift to this new way of conducting elections. It is extremely important that all local League keep up to date on the

changes being brought about by the Voters Choice Act in their communities, as many of these changes will be reported in local news media. County elections officials will be announcing the changes and listing all vote centers and their hours of operation.

Election Consolidation

California recently passed a law requiring all local jurisdictions, including charter cities, to consolidate their local elections with statewide election dates if their voter turnout is less than 30%. This change will have a significant impact on many communities because local elections have often been in the odd-numbered years instead of the even-numbered years used for statewide elections. In such instances, a local League's election activities will be concentrated in one calendar year rather being spread over multiple years.

Voter Registration

The laws on voter registration and the methods or forms used to register voters change from time to time. Registration forms are changed in response to the law and to the need for an easy-to-fill-out form. Citizens 16 to 17 years of age can now pre-register to vote. Voter registration and pre-registration will occur at Department of Motor Vehicle Offices as part of an automatic "opt out" registration when someone gets a new or renews an old driver's license.

Voter registration forms can be filled out online, but voters who do not have California Drivers Licenses or Identification Cards must still print out the form to mail it in. Election Day "conditional" registration is possible at county elections offices. Consult the Secretary of State's website and that of your county elections office to stay up to date on the rules surrounding voter registration and to obtain the most current voter registration form.

Assessing the Election Scene

Each voter service director at the beginning of each League year should initiate research on the websites of the California Secretary of State (<http://www.sos.ca.gov/>) and your county election offices about the ballot prospects and events for the next twelve months. In some areas, with races which cover larger geographic regions, neighboring Leagues' voter service directors should arrange joint research efforts. The information should include:

- dates and deadlines for registering, filing for office, filing ballot statements and arguments, and certification of candidates by the secretary of state
- dates and deadlines for voter registration and requests for vote by mail ballots
- any changes in election laws or regulations concerning voter registration, absentee voting, polling places, etc.
- which agencies will have elections, which seats will be vacant, and state and local initiatives that have qualified or are in circulation

- the name of a contact person within the relevant election offices.

It is important to maintain contact and friendly relations with your local county elections official and staff. Confer with them and offer them volunteer assistance if the opportunity to do so arises. The city or county elections department should feel that the League is a strong ally to be treated with special consideration, including prompt and complete information about elections, candidates, measures, and deadlines. Someone, preferably the voter service director, should be clearly designated as the League liaison with the elections department. Other members of the voter service team should deal with elections officials only through the point person.

Voter service leaders also need to identify what are (a) likely to be the hottest issues or (b) which issues are being neglected by the media. This would be a good time to contact acquaintances who are on the "inside track" on important issues or who hold issues portfolios in League. Part of your preparation for the election season is getting current with what's going on politically. The information can be invaluable to you in your planning, in deciding what to do and what not to do.

Setting Priorities for the Year

The board will use various criteria to set its voter service priorities for the year. One important criteria is usually tradition, those activities that your League is known for and that the community has come to rely on. On the other hand, Leagues should also be guided by current special concerns or issues, and/or by their sense of the pressing needs in their (particularly underserved) communities.

The voter service workload will vary tremendously from year to year, based on the elections cycles at the city, county, state and national level. In some years there will be elections in spring, summer, and fall, with dozens of ballot measures, forcing a League to be quite selective about what it undertakes based on the size of its available voter service team. The historic pattern will be changing over the next few years because state law will require **many** cities and counties to consolidate their elections with state election dates.

In other years, you may be able to coast and catch your breath or undertake some special projects that would not be possible in busy years—mock debates in high school government classes, for example, or citizen information events. If it is a light election year, prepare a list of citizen information activities for your board to consider during its beginning-of-the-year planning.

Assessing Resources

Leagues must also assess what resources they need for desired voter service projects as compared to the resources are available to the League. Resources mean people and money and time.

The voter service leader needs the assistance and support of a voter service committee. The committee does the detailed work that shouldn't be done at board meetings. Committee members should divide up the tasks—such as voter registration, forums/debates, Pro & Con presentations,

press interviews, and preparation of written materials—so that responsibilities are clearly assigned and no one member carries too heavy a burden.

The entire voter service committee should be responsible for recruiting, organizing, and training a voter service crew of moderators, timekeepers, question sorters, deputy registrars, researchers, writers, interviewers, and odd jobbers, as needed by the projects undertaken. To recruit workers, look for lists of past workers and ask the membership director for names of members who have expressed interest in voter service. Use the VOTER to interest other members in joining the team and to alert them of what opportunities are available.

The planning process must involve a review of the voter service budget. Changing priorities of the board may require a budget transfer from other program areas to make implementation of voter service projects possible. The board should definitely consider approaching outside sources for funding. Businesses and service clubs find voter service a particularly comfortable place for grants, pro bono contributions, and tax-deductible contributions to the League.

Voter service activities can be funded from League Education Funds, since these activities are strictly educational and nonpartisan.

A voter service master calendar is an absolutely essential part of planning for the biennium ahead. Consulting with the board, enter any dates that have been set. Provide regular calendar updates to board members so that they may avoid conflicts in their planning.

Accompanying the master calendar and each event calendar should be a timeline for implementation. The timeline is derived by working backward from each target date. You need to calculate roughly how long it will take for each step to be completed, and then add a little padding for the inevitable delays.

Training Voter Service Workers and Crews

League members need reassurance that they will be properly trained before they go before the public representing the League of Women Voters. Part of the planning process must include training workshops for the voter service crews. You could schedule a meeting for the entire crew to review all your voter service activities, but it is probably more efficient to schedule focused workshops for each category: forums/debates; pro & con presentations; voter registration; press interviews; etc. The voter service director should not run all the workshops; divide up the training task with seasoned members.

If you have a League phone and/or an election email functionality on your website, monitored by members, you will need to prepare an election binder with information for them to refer to when voters call the League asking for answers. (See page 26-27 for more detail.) Use your local League website to post as much election-related information as possible, and keep it up to date. Make your League website the best resource possible for your members and the general public that will see it.

When they go out to meet the public, voter service workers need to be prepared to answer questions and challenges about the League's activities. It would be helpful to have reviewed the League's nonpartisan policies and rehearsed a statement about what voter service is and is not. If the League is engaged in any advocacy activities for the election at the state or local level, workers need to know what they are and how to explain the difference between League's voter service and action programs.

Use Social Media To Support Voter Service Efforts

In general, Facebook, Twitter and other social media platforms are an efficient and easy way to communicate with your League members and the general public. Use your League's social media platforms (Facebook, Twitter, a YouTube channel) to:

- advertise and promote voter service events.
- post reminders and notices of voter registration deadlines, vote-by-mail application deadlines or locations of polling places or vote centers.
- solicit questions for candidate or issue forums.
- celebrate voter service accomplishments.
- post videos of voter service events (YouTube).

As with all League use of social media remember these tips:

- Use photos whenever possible for all posts.
- Share social media content from LWV, LWVC and other local Leagues.
- View the guidelines here:
 - [FacebookGuidelines](http://archive.lwvc.org/lwvonly/resourcescomm/LWVUS%20June%202013%20FB%20State%20&%20Local.pdf)
(<http://archive.lwvc.org/lwvonly/resourcescomm/LWVUS%20June%202013%20FB%20State%20&%20Local.pdf>)
 - [TwitterGuidelines](http://archive.lwvc.org/lwvonly/resourcescomm/LWVUS%20June%202013%20Twitter%20for%20State%20&%20Local.pdf)
(<http://archive.lwvc.org/lwvonly/resourcescomm/LWVUS%20June%202013%20Twitter%20for%20State%20&%20Local.pdf>)

Keep Good Records

Evaluate the file your predecessors passed on to you. What do you think of it? Is it easy to use? Is the information thorough and helpful? If not, resolve to make changes for the benefit of your successors. Make good record keeping part of your training workshops.

Voter Registration

Voter Registration Checklist

- Review the areas of greatest need.
- Prepare a calendar and timeline for voter registration deadlines and events.
- Consider media campaign to publicize registration deadline dates.
- Select and prepare materials for League volunteers and voters.
- Contact shopping centers, fairs, farmers markets, etc., about voter registration activities.
- Consider projects at schools, colleges and places of employment.
- Explore the possibilities of a year-round voter outreach program.

The laws governing voter registration in California have changed dramatically in recent years. The registration forms are constantly altered. Plus changes in the philosophy of why and who the League registers to vote have also impacted this work. Together these trends have completely refocused this vital part of our core mission.

Contact your county elections office to seek training about current registration forms as well as training for our members.. It is imperative that members who wish to do voter registration be trained in the new rules governing registration in all forms. Resist the temptation to think that members who have done this in the past don't need to retrain. Learn the new rules and forms. At the very least, the team should meet and thoroughly read through state and county rules and regulations and be sure that everybody completely understands them. They should know where to go to find answers to technical questions--visit the Secretary of State's website at <http://www.sos.ca.gov/elections/publications-and-resources/guide-vr-drives/>. It is an excellent source of information on everything relating to voter registration drives. You can also view the LWVUS webinar on voter registration "best practices" at <https://www.youtube.com/watch?v=011cJYlzseI&feature=youtu.be>, Knowing the rules and giving the best help and information to all voters is a hallmark of the League.

Ways to Register Voters

Online – make sure your website homepage prominently features a register to vote online link to the state Secretary of State's online form webpage: <http://registertovote.ca.gov/>.

In person – at events, either with paper forms and/ or on iPads/tablets you make available. At high volume events, Leaguers have been known to invite people to register using their own smartphones and help them through the process.

By mail – filling out the paper form and mailing it in.

Same day registration -- This is an evolving area. To give voters the most up to date information about this, you should closely monitor the election system in use in your county.

Whatever options your League chooses, you should keep statistics on which methods are used and what the volume is. For your website, you can check the number of click throughs to the SoS site. For events, you keep count of the number of voters registered by whatever method chosen and the number of people who asked for information. Retain these statistics and respond to the LWFVUS and LWVC surveys after each election which asks for these statistics. Being able to document the huge number of registrations done by the organization enables LWFVUS to obtain grants for future voter registration pass through grants. You benefit your League as well the entire organization when we can demonstrate the extent of League's visibility and impact.

Targeting Voter Registration Opportunities

The League carefully considers how best to choose registration projects. LWVC adopted the following voter service strategy: "We work to engage all Californians to participate at all levels of civic life and to make the electorate reflect our state's demographics." LWFVUS has focused attention on specific groups: high school/community college, naturalization ceremonies and underserved communities. We want to engage and mobilize those groups of voters who traditionally have not participated in our elections. By carefully choosing a specific audience and using tools provided by LWFVUS and LWVC, a local League can have a huge impact in this area.

High School Voter Registration

Your board should assess which of these groups could be effectively reached either by the local League itself or in partnership with other groups. High school registration is often a League specialty, as are community college registrations. Of course, all colleges and universities are good partners but the League's long standing relationships with high schools and community colleges are a big plus. Partnering with other organizations such as student governments and special interest clubs, makes the job easier and improves outreach. Local Leagues in California have done outstanding work with high school registration projects. This is an area all boards should seriously consider. Remember that registration is not limited to 18 year olds. Pre-registration is available for 16 and 17 year olds. All forms, both online and on paper, make this option clear.

The California Secretary of State offers information and material for use with high school and college students. Check its website for the most current material. (www.sos.ca.gov) LWFVUS provides a Best Practices training guide: <http://forum.lwv.org/member-resources/article/high-school-voter-registration-training-manual-3rd-edition>. LWFVUS also awards pass-through grants to local Leagues to undertake voter registration activities in high schools, community colleges and alternative/vocational schools in underrepresented communities. The application period is announced each year, usually in November, in the LWFVUS Update. A number of Leagues in California have received these grants for outstanding projects. Your board planning should include this possibility.

Naturalization Ceremonies

If your community has naturalization ceremonies, then you should certainly plan to be present at all such events. This is a wonderful opportunity to connect with new citizens who are enthusiastic about being able to fully participate in our democracy. The League is the perfect group to engage them. And there is a special excitement at these ceremonies which League members experience at least as much as the new citizens. This might be a great place to engage new members. LWVUS provides a guide for local Leagues who want to do this. <http://forum.lwv.org/member-resources/article/naturalization-ceremony-voter-registration-toolkit>.

National Voter Registration Day/Week

The League of Women Voters is a key participant in this nationwide, nonpartisan effort to register hundreds of thousands of voters on one single day in September. But given the realities of life, our work can also be done on another day of that week or on the weekend. Leagues should choose high traffic areas of their community where they know they can interact with large numbers of people. And you can often partner with other groups to impact specific underserved communities or places where large numbers of volunteers are needed.

Every year LWVUS sends out notices well in advance with a link to the NVRD website. Here locals Leagues may sign up, find a great deal of good practical information about how to do it and receive free materials to use when they go out and register voters. Here is the link to the 2017 webpage so that you will have a good idea of what the project is like and what help you will receive:

<http://forum.lwv.org/member-resources/article/national-voter-registration-day-2017>

Also, be aware that the actual Voter Registration Day event often falls on a Jewish holy day. You will need to assess the commitments of your members and the community in which you live to see if choosing another day or the weekend would be best.

As noted above, many local jurisdictions, including charter cities, will be consolidating their local elections with statewide election dates if their voter turnout is less than 30%. In this new situation, there may be significantly less need to participate in National Registration Day in odd-numbered years. Instead, the local League may achieve more visibility and impact by focusing your voter registration work during the spring primary season and as well as going all out on NVRD in the fall.

Underserved and Underrepresented Communities

California is a diverse state with many different groups of people. The League from its founding has had as its core goal to engage as many people as possible in the political process and to get them to vote. Many non-engaged voters feel cut off from the governmental process or feel exploited by partisan political groups. So it's especially important for the League, which has always been non-partisan and worked to engage all citizens, to reach out to these groups to register

them to vote, to give them material that provides good information about where to vote and what's on the ballot, and why they should vote.

Local Leagues should reach out to community groups in under-served areas to create partnerships for voter registration/education. By working with groups underserved communities know and trust, the League can reach these voters with our uniquely helpful material and training. Forging ongoing partnerships is key. Whether it's registering voters yourself, partnering at registration events, or training community groups to register voters, the League provides a vital service.

The Secretary of State's website (<http://www.sos.ca.gov/elections>) League's Easy Voter Guide is offered in five languages <http://www.easyvoterguide.org/> and Voter's Edge California's basic voter information is offered in Spanish (<http://votersedge.org/ca>) . Make use of these resources. Offer them to potential partners.

The community group you work with to register voters can become the partner you work with in candidate forums, new citizen education, high school leadership projects, and workshops which train women how to run for office. Wherever a voter service activity occurs, the organizers should make sure that the League looks its best. Ask the communications director to provide League materials (educational, not advocacy) for sale or giveaway, including fact sheets with details about registering and voting. Remember that every contact with the public is an opportunity to further other League goals, such as public relations, membership, and fundraising.

Voter Information for Elections

Background

The League of Women Voters is renowned for the aid it offers voters in their preparations for election day. Candidates fairs, forums, debates, impartial analyses of ballot measures, voter guides, social media blitzes, and election hotlines are examples of League election services.

With such a range of possible activities, it is essential that the decision-makers in your League carefully select which ones to undertake, relying upon your League's experience, what you already know and do well, and what resources of time, money, and people you have available.

At the same time, you don't want to limit yourselves only to those things you have always done. Leagues should always be willing to consider new approaches, to expand and improve services, to keep them fresh and relevant. At meetings and in the VOTER, you can ask for members' advice about what new areas you should be exploring. You should also contact other community groups, particularly those from underserved communities, for such advice. And anyone, inside the League and out, who complains that League isn't doing enough, who says, "the League ought to be doing" should be offered the assignment on the spot.

Fairness to candidates, fairness to political parties, and fairness to voters, and the League's nonpartisan commitment to the public should guide all your planning for voter service activities. Since the public, the candidates, and the proponents and opponents of ballot measures are extremely sensitive to signs of bias, then you and your voter service workers must be so too. At the same time, remember that your voter service events belong to you, not the candidates. They must fit your format, not manage it.

If, for any reason, an event is not going to meet League standards, do not feel obligated to proceed with it. It is better to cancel than to offer an event that jeopardizes the League's reputation in the community and demoralizes the sponsors.

VOTER'S EDGE CALIFORNIA

Voter's Edge California offers ample opportunity for League members to volunteer their time and skills. Voter's Edge California is an [online voter guide](#) that offers information and links to information on the basics of how to register and to vote, polling place lookup, statewide and local candidates, the ballot measures, campaign finance information, the Pros & Cons and the Easy Voter Guide, collected articles and editorials on ballot measures, and videos of voter service events. This unique online voter guide is a partnership of LWVC and Maplight, the group that delves into the campaign finance information submitted by candidates and ballot measures supporters and opponents. Much of the information about candidates comes through the work of volunteers from Leagues across the state.

In particular, there is always a need for local volunteers whose duties include:

- engaging with local county elections officials to obtain candidate contact lists and ballot measure information;
- drafting and approving questions to pose to local candidates;
- inviting and encouraging candidates to post their profiles and information on Voter's Edge;
- review candidate submissions to make sure they conform with the terms of participation;
- add official local ballot measure information to the site;
- post information about candidate and elections events sponsored by Leagues or other community groups; and
- link relevant news articles and other value added elections content.

There are many ways to divide up the work among multiple volunteers within Leagues. For example, some volunteers invite and follow up with candidates to post information while others review those submissions. Other volunteers can manage ballot measure information. An overall coordinator is needed to oversee the completion of the work. A coordinator can be focused on just one county or may work with other counties as well.

Voter's Edge California reaches voters across the state and provides them with useful and easy to read information about the upcoming elections. Use Voter's Edge California in your League's voter service strategy. Promote it in all your voter service events and on your social media platforms. Encourage your county elections office and community groups that you work with to include a Voter's Edge widget on their sites. Promoting [Voter's Edge](#) also promotes the League!

Candidate Forums

Checklist for Planning and Implementing of Forums

- Establish a planning committee, assign tasks, agree upon a date, a place, and a format.
- Review League guidelines and policies for forums and debates and FEC and IRS regulations.
- Report your plans to the League's Board.
- Invite candidates/debaters, providing detailed information, such as directions to the facility, return receipt requested or with return stamped postcard to sign and mail.
- Select members for key roles such as moderator, question sorters, etc.
- Work out the nuts & bolts details of the meeting: seating, lighting, microphones, electric outlets, visual aids, name cards, chairs, tables (with modesty skirts); water bottles and cups, signs, programs, stopwatch and time cards, gavel, index cards, pencils, restrooms cleanup, parking.
- Send press releases to local media and on your social media
- In the last week, phone candidates (or their campaigns), moderators, cosponsors, and facility manager, to confirm and ask/answer last minute questions.
- The day of the event review the nuts & bolts details (see above) one last time
- For the record, conduct an evaluation of events.
- Send notes of appreciation to all participants.

In some Leagues, all its candidate forums in which the League participates are initiated by that League; in other Leagues, many of these events may be initiated by other organizations, with the League providing co-sponsorship, guidance, and/or personnel. But in either situation, much careful planning is necessary to assure the success of the forums, including maintaining the League's standards of excellence and nonpartisanship. (See Sample Memorandum of Understanding for a co-sponsored candidate forum below.)

LWVC Education Fund is responsible for statewide debates--for the races for U.S. Senate and the state constitutional offices. Any local League that has an opportunity to participate with other organizations in sponsoring candidate forums for those offices must consult LWVC first. They are free to arrange debates for U.S. Congress, the state legislature and county and local government races without prior consultation. Local Leagues that share districts should consult to work together where possible and to avoid scheduling conflicts.

General Guidelines for Forums & Debates

Candidate Participation Criteria

- **Establish candidate participation criteria.** Sponsoring and/or participating in candidate forums require careful oversight by the whole board to protect the League’s nonpartisanship. Leagues are strongly advised to adopt careful, objective candidate participation criteria before each election season gets underway and before the candidates are known (e.g., no later than the League’s January board meeting).
- **Consider if the best policy is to invite only “leading candidates” or to include smaller party or independent candidates in forums, and invite everyone.** People who have little prospect of winning can still add spice and life to an event. A League forum may be the only exposure the small-party candidates are given, a fact that will strengthen the League's reputation for fairness.
- **In establishing participation criteria, a League might require:**
 - evidence that a formal campaign is being waged, i.e., existence of headquarters, campaign staff, website and social media presence, issuance of position papers and campaign appearances;
 - evidence of some measure of public support (polling by an independent operation);
 - of campaign funding.
 - See “Candidate Participation Policy for Statewide Debates or Forums” in the members only page for examples of what can also be used in local debates and forums.

Co-sponsoring a candidate event

- **Consider co-sponsoring candidate related events.** Leagues can co-sponsor candidate related events with other groups. This can be done so long as the co-sponsoring group agrees that the group will make no endorsement of any candidate until after the event is over. See “Forum Guidelines for Cosponsoring” for a detailed discussion.
- **Develop a memorandum of understanding (MOU)** in writing between the League and the other group(s) that lists:
 - the duties undertaken by each group;
 - the ground rules of nonpartisanship;
 - that the group will make no endorsement of any candidate prior to the event;
 - any agreements regarding the promotion and marketing;,
 - any agreements as to the nuts and bolts of putting on the event such as who is the contact person for candidates, the candidate participation policy, and/or duties for making the physical arrangements;
 - that any recording of the event must be aired in its entirety by the co-sponsoring groups (unless the partner is a television or radio news operation. This might be subject to negotiation).

Having an agreement in writing helps Leagues and cosponsoring groups to think through the responsibilities needed to execute an effective and smoothly running

event. Failure to have an MOU can cause serious problems later. Candidates and advocates complain that the event is a "setup." They will refuse to participate or will withdraw at the last minute.

- **Working with media and other organizations that will ultimately endorse candidates.** To provide voter information Leagues may choose to work with other organizations. In deciding how to work with such groups, a League needs to consider carefully how its participation might affect its nonpartisan status or the public's perception of the League's nonpartisanship. **It also is important to make clear that the League cannot waive its nonpartisan policy or any procedures that ensure fair treatment of candidates.** The same is true when a League cooperates with a newspaper or other media outlet to produce or distribute election information. Agreements for broadcast events should include a prohibition on airing selected portions of the event by either the candidates or the media. See below for discussion of what to put into a Memorandum of Understanding with co-sponsors.
- **Include a member of the voter service committee in the planning for any event with which a League will be associated.** Failure to keep in close touch with plans as they develop has caused many nasty surprises at meetings that were embarrassingly "un-League-like." Involvement in planning can range from attending every planning meeting to periodic exchanges of emails, memos or phone calls. Use your judgment to decide the extent to which the League's physical presence is needed in the planning of each event.

Planning Considerations

- **Successful candidate forums require weeks of planning.** The League or another sponsor must contact the candidates early, before their schedules are filled, possibly including early "save the date" messaging. The exchanges of invitations, acceptances, responses, confirmations, and inquiries about details are time-consuming, especially when certified or registered mail is deemed necessary. In addition to a voter service master calendar, you should have a calendar for each event, with target dates for every stage of the countdown.
- **Part of the planning involves analysis of each race and a decision about what kind of a format it calls for, whether to use tight or loose controls.** A race with opponents who are respectful of each other permits informal and innovative approaches to format. At the other extreme, where the gloves are really off, a carefully structured format is advisable.
- **All invitations and instructions to candidates must be in writing and identical to each candidate.** Each candidate should receive identical information about the forum or event in a letter that states:
 - The purpose of the event
 - The date, place, and starting and ending times

- The format to be used, including the time allotment for opening/ closing statements, the time allotment for answering questions, etc. If all candidates will be asked to answer prearranged questions, include the questions with the invitation.
 - The candidate participation policy
 - A deadline for accepting the invitation
 - A questionnaire or request for biographical information to go in the program, if you will be printing one
 - Information that the event will be taped, if it will, and provisions regarding who may and may not record or videotape the event.
 - information that describes who owns any recordings of the event (the League and co-sponsoring organizations. Candidates
 - a declaration that a recording of the event belongs to the League and any co-sponsoring organization and that it will be shown in its entirety.
 - rules for the display and distribution of campaign materials. (See page for sample letter.)
- **It is recommended that all invitations contain a separate “candidate agreement form” for candidates to sign and return.** It should include agreement with the format of the event, the candidate participation policy (if any is used that doesn't include all candidates), who may and may not record or videotape the event (not the candidate, staff, or general public), that they agree that their staffs, family, and friends will not record or videotape the event; who owns any recordings of the event, and agreements regarding the display and distribution of campaign materials.
 - **Use some method of confirming receipt of the invitation.** A wise protocol would be to use first a stamped communication addressed to you for the candidate to sign and return, or a similar email communication. If there is no response, then a phone call from you, and if that fails, a second mailing by return receipt requested or similar email communication. Using this method helps to avoid having participants (and their campaign managers) say, "Nobody told me that...."
 - **Any details you agree to on the phone should be put in writing and emailed or mailed to the candidate.** Bring to the event copies of any communications sent to the participating campaigns(s).
 - **Strive to have key players, such as moderators and question sorters, to participate in the planning for all events in which they will be involved.** It is good to make sure that they are aware whether the individual elections will be tumultuous or serene, what the hot issues will be, what campaign messaging exists, and how other events in the same race have gone. This will help them anticipate potential problems and develop procedures for dealing with them.
 - **League boards must develop a policy for dealing with the failure of candidates to participate in its candidate forums, a policy which must be in place well before the election season begins.** The policy should recognize that some candidates are being

advised to avoid public appearances as part of their campaign strategy, while others are unable to attend because of illness, schedule conflicts, or other genuine explanations. If there are any candidates absent from a forum, at the beginning of the forum it should be announced by the moderator that all candidates were invited to participate, but that one or more candidates are not participating. Some Leagues permit absent candidates to submit brief opening statements to be read by the moderator, but other Leagues will only announce that the absent person is a candidate for the office.

- **Avoid “empty chair” forums and events.** This usually occurs when there are only two candidates running for a position, but can also occur when there are more than two candidates. Having only one candidate appear is interpreted as an endorsement of the candidate that appears or as a contribution to the candidate, and Leagues must not appear to support or oppose a candidate. If a candidate agrees to appear but then cannot due to something like an illness or accident that occurred very close to the time of the event, some Leagues allow the appearing candidate to make a brief statement, no longer than an opening statement, while others simply cancel the event. The circumstances and tenor of the region the League exists in can dictate what response to a sudden cancellation is appropriate.

Note: Regulations of the Federal Elections Commission (FEC) and the Federal Communications Commission (FCC) say that a televised debate must have at least two participants or the event will be considered to be in support of the single participant. The Internal Revenue Service’s audit guidelines refer to the FEC/FCC policies as good guidance. A League, therefore, may not hold a candidate forum with only one candidate participating. To do so would constitute an endorsement of the candidate present or a contribution to or expenditure on behalf of a candidate, jeopardizing the League’s (if it is 501(c)(3)) or its Ed Fund’s tax-deductible status as a 501 (c)(3) organization. This is advice should be followed even in local contests because the League’s action in presenting a single candidate can be perceived by the public as partisan and in violation of the League’s bylaws.

- **One of the most difficult situations for sponsors of candidate events is the race that has a multitude of candidates—say thirty-five candidates for mayor.** Such races will put to the test your criteria for participation of candidates in traditional League forums. They may also lead you to consider a candidate fair, an election preview, or a written voters’ guide as alternative ways to present candidates to the public. See “Recommendations for formats in multi-candidate forums” in the members only page.
 - Each debate should be followed by a "morning after" debriefing of the moderator and others who attended, to evaluate the event and the decisions that were made in its planning.

FORUM PARTICIPANTS

Forum participants usually include:

- moderator
- timer(s)
- question sorter(s)
- question gatherer(s)
- panel (optional)
- audience

League members generally serve as moderator, timer(s), gatherer(s), sorter(s) and sometimes panelists. League members must take great care to be neutral throughout the proceedings and make sure nothing that they say or do may be construed as personal preference or favoritism. Also, individuals who serve in these roles should have no connection with the candidates or issues that are the focus of the event. If the circumstances surrounding an election makes it necessary, it is permissible to ask a neighboring League to provide a moderator.

Moderator - The role of the moderator is that of master of ceremonies and conductor. The moderator introduces the participants, explains the format and procedures of the forum, identifies whose turn it is to speak, ensures fairness, ensures time limits, and maintains decorum both among the candidates and in the audience. The moderator should be a League member who has attended forums in the past and, preferably, has had some formal training or has participated in previous forums in some capacity (e.g., timer or sorter).

Timekeeper - The role of the timekeeper is to ensure that all candidates/speakers are given an equal amount of time to present their information. This role is often carried out by two people: one person to operate the stopwatch and one person to hold up the cards indicating the amount of speaking time remaining. The time cards and a stopwatch are provided by the League. The duty of timekeeping may be conducted by a single person.

Sorter - The role of the sorter is to review written questions from the audience for appropriateness and redundancy. Questions are usually written on notecards, which the sorter reviews and puts in a recommended order for the moderator to present. The moderator may revise some questions, revise the order the questions are presented or reject questions, based upon the dynamics of the event or the amount of time available.

Panel - The role of the panel is to ask questions of the candidates/speakers. Panels are generally used in more formal or televised forums. Panelists are usually members of the media or knowledgeable League Members. They should be people knowledgeable about the race or issue and come to the forum with prepared questions. The questions are reviewed by the forum coordinator or moderator and fellow panelists to select which questions will be presented. Some Leagues like to ask panelists to work together before the event to determine what questions will be asked and what order they will be asked in.

FORMAT

The moderator usually works closely with the League Voter Service Director or Speakers Bureau Director to plan the format of the forum. An experienced moderator may work directly with the organization that is co-sponsoring the event.

The format generally consists of:

- introductions
- opening statements
- questions and answers
- rebuttal (optional)
- closing statements
- wrap-up and final announcements

The amount of time that is allotted to each component is determined by the amount of time available for the forum, the number of candidates/speakers, and the preference of the organization sponsoring the event.

The order in which the candidates/speaker will speak may be determined in different ways, as long as the way chosen is neutral among the candidates. In some situations it may be feasible to use the ballot order of the candidates. Other times the order is determined just prior to starting the event, by chance: drawing from a deck of cards, drawing numbers or straws, etc. The draw sets the speaking order for opening statements, the first question (the speaking order for subsequent questions is rotated), and closing statements. Some candidates express concern about being first or last. The assumption we present is that there is an advantage to having the "first word" and the "last word".

Many moderators find it very helpful to prepare a script for the forum. The script may be forwarded to the sponsor of the event to verify the format and other pertinent information. Several sample scripts are included in this package. The samples vary depending upon whether the forum is being televised and whether a panel is present.

Following is a description of each component of a typical forum:

Introductions - The moderator begins the forum by introducing him/herself and the sponsors of the event. A short statement about the League is usually presented, in particular the League's nonpartisan policy should be described. The moderator then describes the format and rules of the forum. Finally, the moderator introduces the candidates/speakers.

Opening Statements - Each candidate/speaker is given an allotted amount of time (usually one to five minutes, depending on time available) to present an opening statement to set the tone for their presentation.

Questions and Answers - Questions may be posed in several ways:

- written questions from the audience presented by the moderator
- predetermined questions written by the League are recommended so that there are enough questions in the absence of a sufficient number of audience questions. See "Guide to

Writing Unbiased Questions” for ideas and as part of training question sorters to recognize biased questions.

- predetermined questions from a qualified panel (perhaps of journalists)
- verbal questions from the audience presented directly to the candidates should generally not be allowed in order to avoid duplicate questions, possible personal attacks, opportunities for the ‘questioner’ to make a speech rather than ask a question, etc.

The time allotted for questions and answers is determined by the number of candidates/speakers and the time available for the event. The number of questions presented to the candidates/speakers is determined by the amount of time allotted in the agenda for this portion of the format and by the need for each candidate to answer the same number of questions.. Generally, the time each candidate/speaker is given to answer each question is 30 seconds to two minutes. When time has run out, the moderator usually indicates that the final question is being presented.

Written questions are reviewed and sorted by one or more designated sorter before being given to the moderator for presentation. The moderator may revise the questions or their order of presentation based upon the situation.

When a panel is used to present questions, the order in which the panelists will speak is usually determined in advance and the speaking order maintained throughout the questions.

In candidate forums, the speaking order in which the candidates will answer questions is generally rotated. The candidate who drew the first speaking order will answer first on the first question; the candidate who drew the second speaking order will answer first on the second question, and so on. It is advisable before asking the question to announce which candidate will answer first so that he/she is prepared to speak. Included in this packet is a sample rotation guide that is helpful in keeping track of the speaking rotation.

The moderator must take care to ensure that each candidate is given an equal opportunity to speak. If a candidate does not wrap up his/her statement in the allotted time, the moderator should point out that the speaker's time is up and move on to the next candidate (usually letting the candidate finish his/her sentence, within reason).

Rebuttal - Some forums, generally those with few candidates/speakers and/or a lot of time, will offer candidates/speaker an opportunity for rebuttal. It gives the candidates/speaker a chance to respond to how the other candidates) answered the question or further clarify an issue. Basically, it gives the candidate/speaker "seconds".

Closing statements - Each candidate is given an opportunity to wrap up his/her presentation with a final statement. The time allotted is usually one to five minutes. The order of presentation is normally the same as the original rotation "draw".

Wrap-up and Announcements - The moderator wraps up the forum by reminding the audience to vote and makes any announcements that the sponsor requests.

POTENTIAL PROBLEMS

Oftentimes, groups or individuals want to distribute literature before or during the forum. To ensure fairness and minimize distraction, it is recommended that distribution of literature not be permitted until after the forum. If possible, set up a table near the exit where literature (including League information) may be picked up as people leave.

Despite a moderator's efforts to maintain decorum, forums occasionally become heated and emotional. If participants or the audience become uncontrollable, the moderator may find it necessary to call a recess to quiet things down or adjourn the forum entirely. Please see "Facilitation of Civil Discourse in Candidate Forums" in the members only page.

The following lists are useful for developing candidate participation agreements, for explaining how audience questions will be used, and for training question sorters.

BASIC GROUND RULES FOR CANDIDATE FORUMS

1. There will be no substitutes or stand-ins for the candidates
2. Any news releases about the debate will be handled by the sponsoring organization(s) and sent simultaneously to all the candidates
3. No campaign banners, signs, literature, handouts, buttons, tee shirts, or other campaign paraphernalia will be allowed in the debate hall until after the forum has concluded
4. The audience will be asked to refrain from applauding or in other ways demonstrating support or nonsupport for a candidate
5. There will be no audience reaction shots during the debate, although panning of the audience before and after the debate may be allowed
6. Candidates will be introduced by full name. Thereafter, "Mr." and "Ms." will be used.
7. The candidates will remain seated at all times during the debate
8. The candidates will not use props, but may bring notes; a notepad and pen should be provided for each candidate.
9. Time limits on responses will be strictly observed. A timekeeper will hold cards, visible to the speaker, indicating how much time remains. When the "stop card" is shown, the speaker must end his/her speech within 10 seconds.
10. The moderator will have the responsibility for enforcing time limits. The moderator also will have the authority to interrupt the proceedings to enforce the ground rules and format that were agreed to by the candidates.
11. Questions from the audience will be submitted in writing.
12. The moderator will read the questions
13. The moderator may restate the question
14. The candidates will not interrupt one another
15. No flash cameras and no cameras of any type will be used during the debate other than those authorized by the sponsors.
16. Candidates' campaign staffs, family, and friends may not record (video or audio) the event and may not edit or manipulate any recording placed online by the League.
17. Photographers and the press will be placed at a reasonable distance from the candidates and microphones to reduce distractions

18. Candidates are invited to remain after the conclusion of the forum to speak with audience members

GUIDELINES FOR WRITTEN QUESTIONS AT A FORUM

1. Cards (for written questions) will be available before and during the forum. Cards will be collected by the question gatherers.
2. One question per card. All questions should be written so as to be applicable to multiple candidates.
3. Questions should be brief and should relate to issues involved with the office that is being sought.
4. Negative remarks, rudeness or profane language are not allowed.
5. Questions that appear to "attack" a particular candidate will not be permitted.
6. The sorter(s) or other League member(s) will sort all questions collected and will follow the following guidelines:
 - Similar questions will be combined, if appropriate, to avoid duplication. Questions may be edited for brevity and/or clarity by the moderator.
 - Inappropriate questions will be eliminated. This includes questions that are not related to the office/subject of the forum or that are personal attacks on one or more candidates.
 - Questions will be chosen that cover a variety of topics
 - The moderator or sorter(s) will prioritize based on their experience, perceived areas of interest in the question by a majority of attendees, etc.
 - There may not be sufficient time for all questions
7. Some Leagues do not use questions that are directed to a specific candidate. The fear is that the question is a form of attack on a candidate, plus it is not a question that can be answered by all the candidates.

GUIDELINES FOR QUESTION SORTERS

1. Try to have at least two sorters. Any co-sponsor may be invited to have a representative. A League member must be one of the sorters, preferably an experienced member who should lead the sorters if possible.
2. The sorters should participate in the planning process for the forum, and help to assess questions which come in from members or the public before the beginning of the forum by email or telephone. There should be a list of questions available to the moderator at the beginning of the forum.
3. At the forum, question gatherers should be available to distribute cards to audience for questions before and during the forum. Cards may be 3x5". (Have pencils, too.)
4. Each sorter should take a number of questions. Read through them and divide by:

- Inappropriate questions. Put aside but do not let them look abandoned. Discard questions that are personal attacks; that are irrelevant to the office for which candidates are running, ridiculous, or not clearly stated.
- Good general questions on a variety of issues.
- Questions that cover the same topic. Group them together to determine which is the best one to use.

5. Ideally, questions are sorted so that the best general questions are first. As soon as the sorters have three to six questions, they should be taken to the Moderator so the meeting flows uninterruptedly.

6. Include issues/questions of local concern for county, state, and federal candidates.

7. Include "good government" questions and fundamental questions such as "How do you see the job of representative of the people?"

8. Rewrite questions that are barely legible so the moderator can read them!!

9. Make sure that no microphones are near where the sorters are working. (The card shuffling and whispers between sorters as they work through the questions can disturb the proceedings).

10. Maintain a neutral demeanor. (Watch facial expressions. Keep whispers between Sorters to a minimum).

11. Keep an eye on the clock.

Handling Criticism

Campaigns are high-stress enterprises with candidates jockeying furiously for position. It is not uncommon for charges of unfairness and bias to be raised either during the event or afterwards.

Complaints about the League's process should not be ignored. Handle them out side of the event itself. They may indicate a need for additional training or for a review of policies and procedures. At the same time, Leagues need to develop a philosophical attitude toward most of such charges, which may be part of a candidate's overall strategy, or a sign of a candidate's exhaustion and panic or tendency to blame others. If Leagues are mentally prepared for criticism, they can examine it calmly and handle it in an open and dignified way.

SAMPLE MEMORANDUM OF UNDERSTANDING CANDIDATE FORUM CO-SPONSORSHIP AGREEMENT

The League of Women Voters of _____ (LWVXX) and [co-sponsor] agree to the following as it pertains to the candidates forum(s) for the candidates seeking the office of [Office]. Target date for the forum is the week of _____.

Criterion for Candidate Participation is as follows:

- All eligible candidates for the Office

Candidate Promotional Material:

- Following the forum only, candidates will be permitted to display and hand out campaign materials at a promotional table staffed by campaign workers, No campaign materials such as tee-shirts, posters, flyers or placards will be permitted to be displayed before the forum or inside the forum venue.

Format

Based on LWV procedures, we anticipate the following format for the evening:

- The forum proceeds only if at least two of the eligible candidates are participating. There will be no substitutes for candidates – only the candidates themselves will be permitted to participate.
- Welcome and brief opening remarks from each co-sponsor
- Introduction of the moderator and the candidates

Question Process

Candidates will be [standing at podiums] [seated at the dais] throughout the forum. A moderator will address all of the questions to the candidates. Alternatively, each cosponsor will provide a panelist to pose questions to the candidates. There will be _____ break(s) during the program. During that time, _____, allowing candidates to stretch and relax.

- There will be an opening statement by each of the candidates of 2 minutes each.
- Closing statements from each candidate will be 2 minutes each.

Co-Sponsor Roles and Responsibilities

[Venue co-sponsor] will make available at its facility a suitable venue for the forum. It will also provide volunteers to participate in the various roles required.

LWVXX

- Provide the liaison with candidates; including candidate invitations and candidate participation agreements

- Provide a moderator.
- **Provide several volunteers to assist that evening, to greet and help attendees find seats and other tasks as determined. (TBD: RSVP, registrations, name tag preps, candidate tables etc.)**

Communications

LWVXX will promote the forum on its public website, social media sites, and to its member and e-newsletter distribution list.

Unauthorized videotaping is not allowed. No portion of the contents of the production video may be reproduced, edited or used without prior consent of all forum co-sponsors. No portion may be used either to promote one candidate or oppose another, or in any way imply endorsement of a candidate by any of the forum co-sponsors.

Further discussion regarding how our organizations will promote the forum and how the media should be engaged should also be discussed. Agreement should be developed based on the results of our discussion on the following points:

- Designate a point of contact for media inquiries. Develop a list of the appropriate press contacts for dissemination of the press release.
- Establish which organization will develop an event flyer with all co-sponsor logos affixed
- Create a communication timeline outlining how and to whom the event will be publicized.
- Develop a press kit with information about the forum, criteria for participation, and the co-sponsors.

Signed:

[Venue Co-sponsor]

President, LWVXX

Date:

Date:

(This sample memorandum of understanding was provided by LWV Los Angeles.)

Sample Moderator Training and Moderator Script

Courtesy of LWV Oakland

Webinar 12/16/19 [Tips on Moderating Candidate Forums](#)

This packet includes:

- Overview and expectations
- Organization and procedures
- Preparation
- Checklist of Questions to ask before the event
- Audio visual tips
- Handling difficult situations
- Order of questioning options
- Sample schedule
- Sample script
- Grid for keeping track of questions

Overview: What is Expected of the Moderator?

- The moderator's job is to ensure equal time for the issues and/or the candidates.
- The moderator's job is to provide a civil and productive environment by graciously but firmly enforcing the guidelines and rules that were carefully spelled out before the forum, for both the participants and the audience.
- The moderator does not contribute comments of his/her own – the moderator's function is to facilitate and encourage questioners and candidates.
- Because unforeseen problems do arise, the moderator should be quick-witted and resourceful at problem solving.
- You do not have to invent all this yourself. These guidelines and tips are the fruit of many years of League experience; they are here to help you.

Candidate Forum Organization and Procedures

- Important: Other League or co-sponsor volunteers are responsible for making these happen. The moderator should be aware of them and know who is doing what. Get the lay of the land. You can ask for this information ahead of time, when you agree to moderate the forum, or when you first arrive.

Pre-Forum Prep

- Review ground rules with candidates before the forum starts (see separate document).
- Please review attached sample script ahead of time. It contains many of the rules governing the proceeding.

Checklist of Questions to Ask Before the Event

- If co-sponsored, who are the key co-sponsor contact people for
 - Event planning
 - Day-of coordinator to be present at the event

- Emergencies
- Audience
 - About how many are expected to attend?
 - Are there issues specific to this district that may be controversial or sensitive?
- Co-Sponsors
 - Have they co-sponsored a forum with the League before?
 - If not, do they have a clear understanding of the non-partisan policy?
 - If this particular organization also endorses candidates, it should be clear that any mention of endorsement at this event is misplaced.
- Location
 - How do you get in?
 - How do you get there?
 - Where should you park?
 - Where in the building is the forum?
- Set-up – Will there be a podium?
 - How many mics will there be?
 - Where will I be?
 - Where will the audience be?
 - Where will the speakers be arranged?
 - Will the table be skirted?
 - Will there be name cards?
 - Who will keep time? How?
 - Who will supply water?
- Program
 - What is the format in terms of timing? How many minutes for opening/closing statements, responses to each question, rebuttal if any, based on number of candidates, questions, time allotted overall?
 - Have the candidates been made aware of the format?
 - Have you coordinated with question gatherers/sorters and timers?
 - Who will ask questions and how?
 - Will there be a reception before or after?
 - How tight is the time?
 - Who will introduce me?
 - Will I do the introduction and closing?
- Publicity – How is this forum being advertised and does it have competition?

Audio Visual Tips

- Moderator stands at the podium and, in opening and closing statements, looks at the camera.
- When asking questions, look at the candidates.

- There is no need to look at the audience in attendance – you are addressing the YouTube audience.
- Speak directly into the mic to be heard on line.
- Do not wear any campaign badges or other campaign slogans.

Handling Difficult Situations

...a candidate keeps going when his/her time is up?

Interrupt gently, but firmly. “Excuse me, Mr. Candidate, but you have used up your time.” You can let people finish their sentences, but some people’s sentences never end.

...a candidate gets obstreperous?

Address him/her directly. “Ms. Candidate, you are out of order.” “Mr. Candidate, I must remind you once again that you are not being fair to the other candidates.”

...a member of the audience is unruly?

Address him/her directly. “Sir, please sit down and wait your turn.” Or “Please respect the rules we have established so that we may have an orderly discussion of the issues.” Usually, your comments and growing peer pressure from the audience will do the trick. If it doesn’t call a brief recess and speak to the rabble rouser yourself.

...the audience gets unruly?

Remind the audience that this not a rally for voters who have already made up their minds, but a non-partisan meeting for those who have not. You can use such comments as: “We understand that many of you have strong feelings about this election (issue), but others have come tonight to help them decide how to vote. Please let us use all our time for discussion of the issues.” Or “Please, let’s not waste time that should be spent discussing the issues.” Remember that you have the authority to call a recess to review the ground rules with the co-sponsors and participants. You even have the authority to decide that the conditions do not exist for a useful discussion of the issues and adjourn the meeting.

...a question to a candidate is really a personal attack?

This should not happen when we have question-sorters whose job is to screen all audience-submitted questions. If a different format is used, it may possibly occur. Rule the question out of order explaining that we are here for an open, orderly exchange on the issues, not character assassination. Ask for another question.

...there is a challenge to your authority and the way you are conducting the meeting?

Calmly restate the ground rules and proceed. If the challenge continues, you can call a recess and caucus with the candidates and sponsors. This shouldn’t happen if there have been careful preparations.

...a “question” is really a statement?

Interrupt. “Please phrase your statement as a question.” Some moderators time the questions as well as the answers.

...all the questions are on the same subject?

When the questions are submitted in writing, you and the question sorter can consolidate them and explain to the audience “We have three questions on the same topic – here is what they are asking.”

...the audience is very small?

Consider rearranging chairs in a more informal setting such as a circle and perhaps adopting a more conversational format. Give candidates more time to answer questions.

...you run out of questions?

Adjourn. Sometimes the audience is small or the race lacks hot issues. Just move ahead to the closing statements and send the grateful audience home to bed.

...people demand to see the written questions afterwards?

Refuse them. This has caused great trouble in the past. One campaign worker called unanswered questions into the newspaper after the meeting and they were published (inaccurately) in the next edition. Questioners’ handwriting may be recognized and their privacy invaded. So, keep the questions yourself, show them to no one and destroy them after the meeting.

Order of Questioning Options

Use the grid attached to the model script to keep track of how many questions each candidate has answered. Make sure the candidates all have an equal chance to talk.

There are a variety of models. Please pick one that is consistent with the number of candidates.

1. One question asked of all candidates, rotating which candidate gets to answer first. A variation is to allow the first candidate a longer time to answer, with shorter follow up responses. When everyone answers every question it can be boring.

2. A question goes to 2 or 3 candidates Then a new question goes to the next 1- 3 candidates. Again, time limits can be longer for first responders. This format is more lively for the audience.

3. Candidates have tokens for responses. For example, with 12 questions each candidate has an equal number, 6-8, of tokens or numbered cards they can use on follow up responses to any question. Use of tokens will be recorded by LWVO on a chart visible to the audience. Candidates don't know what the questions will be, so have to guess whether this is one that they want to spend their time on. If they have tokens left at the end, they can use it to add to closing statement time.

4. Three candidates get to answer each question, a different group of three each time and with different candidates starting off. At the end there is one round in which everyone gets to talk about one question that they wish they'd gotten to answer.

5. The lightning round is popular, in which the candidates are forced to answer yes, no or undecided to specific questions. Such questions can be hard to write, but if the audience is asked to think about such questions they might come up with some good ones.

6. It is not necessary to draw lots for speaking order. No one has objected to randomly assigned speaking order.

7. Closing statements should be presented in reverse order from the opening remarks.

Sample Schedule

6:05 Start

6:10 Opening statements

6:25 General questions

7:33 last question

7:37 Actual last question to everyone: what question did you want to answer, but were not asked?

7:45 lightning round

7:50 closing statements

7:59 thank you and good night

Candidate Forum Sample Script

Welcome and thank you for being with us tonight _____ [insert date and name of Forum]. I am _____ of the League of Women Voters of Oakland. The League of Women Voters is a trusted membership organization that encourages informed and active participation in government. We do not endorse or oppose candidates or political parties. The League participates in issue advocacy and voter education. The advocacy arm of the League may take positions on issues such as arise in ballot measures. This Forum is presented by the education arm of the League, which does not take positions or advocate for them.

I'd like to remind everyone that the candidates (if there are co-sponsoring groups also mention their names) have all agreed to participate under Guidelines set for this forum. The guidelines are also posted outside the room.

As a matter of courtesy, please turn off all electronic devices. Please be aware that campaign literature or other forms of campaigning, such as buttons and tee shirts, signs, are not permitted inside the forum room, in order to maintain neutrality.

We are videotaping tonight's forum (and broadcasting through KTOP if appropriate), and the session will be available on YouTube, through our website and on social media for the broader community to access. You can find links on our website, LWVOakland.org, or through VotersEdge.org/ca.

We have ___ forums on the agenda tonight. The first will be for the position of _____. There are ___ candidates running for this position. They are _____.

_____ The second forum this evening will be for the position of _____. There are ___ candidates running for that position. They are _____.*¹

GROUND RULES

Let's go over a few ground rules. Each candidate has ___ minutes for opening remarks. [Timing to be determined by length of forum and number of candidates.] The speaking order has been randomly assigned. The timekeepers will signal candidates with colored signs marked 30 seconds and STOP.

¹ *If there is a missing candidate state:

There will be ___ candidates listed on your November ballot for this position. _____ is a candidate for this office who could not attend this forum. The ___ candidates participating tonight met the criteria for participation according to our rules [shared with co-sponsors], which include:

- Presence of publicly accessible campaign headquarters.
- Telephone number, other than a personal or home number, listed under the campaign's name.
- Campaign bank account and treasurer.
- Registration with the California Secretary of State as a formal campaign committee.

As audience members arrived, our volunteers provided cards for submitting written questions. The questions will be screened to avoid duplication and anything inappropriate. The order of answering the questions will alternate and each candidate will have ___ minute to respond to each question.

There will be no separate rebuttals. However, the candidates may choose to use some or all of their ___ minute to rebut the response given by another candidate. Following the questions, each candidate shall have ___ minute for a closing statement in reverse order from opening statements.

Now let's begin with our [first forum and] first candidate: [Each gives opening statement of ___ minutes.]

Now, it is time for the candidates to answer your questions. [Use questions from audience processed by question sorters, then pre-prepared questions. If time allows or there are no more questions, entertain questions from the floor.]

This next question will be the last one so that we may end on time.

Now, the candidates will make closing statements. We will reverse the order that we began with. [Each gives closing statement of ___ minute.]

ENDING THE SESSION

On behalf of the LWVO, I want to thank the candidates for running for this office and for their participation this evening. I also want to thank the audience for coming to meet the candidates and proposing thoughtful questions. For further information about upcoming forums, the candidates, and ballot measures, please visit the League's award winning and easy to use website, lwvoakland.org or votersedge.org/ca. There you will find information about candidates and ballot measures, and links to other sources of information about the upcoming election.

Members of the League of Women Voters do the hands-on work to safeguard democracy. While we never endorse a candidate, we are directly involved in shaping important issues to keep our community strong. If you would like to be involved with the men and the women helping make democracy work, it's easy to join the League. We encourage you to visit our website at lwvoakland.org. Visit us on Facebook and follow us on Twitter. Look for the League's Oakland Easy Voter Guide inserted in the October __ issue of the East Bay Express.

The deadline to register to vote is _____. If you have moved or changed your name or wish to change your party affiliation since you last registered, you need to re-register by _____. On-line voter registration is available at the Secretary of State's website, sos.ca.gov. And we have voter registration forms available right here tonight. Please stop at our table on your way out for forms and other information.

Remember to vote by mail or at the polls _____. Encourage your family, friends, and neighbors to vote.

Information and Advocacy Forums

The above framework of what has been described about candidate forums is also valuable for conducting forums for voter information purposes or advocacy. Typically, these events need a moderator, question sorters, question gatherers, etc. Planning and publicity for these events also requires much planning in advance.

Information Forums

Many Leagues hold forums for voter information purposes. These may be held when there is an important issue facing a community, and possibly serious controversy arises about it. The League can provide a neutral, calm and civil presentation of the factual background of the issue and its consequences to the community, which is likely to be of great value and strongly enhance the League's image. And importantly, it is something the League can do whether it has a position on the issues or not.

In structuring these events, careful planning is needed to create a panel of individuals who are experienced and knowledgeable about the issue, individuals coming to the issue from different perspectives so that collectively they can provide a rounded view of the issue. Depending on what the issue is, many of these panelists will likely come from outside the League. It would be reasonable to allow questions to be addressed to individual panelists, but overall the questions will have to be carefully structured and filtered so that they address key aspects of the issue and its consequences from all the panelists. The moderator will have a very important responsibility to see that all the panelists are heard from to share their expertise and knowledge. The collective effort must result in a program that does meet the goal of a neutral, calm and civil presentation.

Advocacy Forums--These are not Voter Service Events

Leagues can also hold forums for advocacy purposes, based on existing League positions. Such forums are not part of voter service. Make sure everyone involved understands that, including the audience. Even though the League has an advocacy goal, the event should be carefully planned to also provide a calm and civil presentation of the factual background of an issue, as well as possible policies to address the consequences of the issue in the community.

And here, careful planning is needed to create a panel of individuals who are experienced and knowledgeable about the factual background and possible policy alternatives. Again, questions from the public or the audience could be addressed to individual panelists, but overall the questions will have to be carefully structured and filtered to achieve the desired goal. The moderator will be the key role to see that it all works.

Pro & Con Presentations

Checklist for Pro & Con Presentations

- LWVCEF prepares extensive materials on ballot measures.
- Schedule workshops to review ballot measures and practice presentations.
- Using LWVCEF information, draft scripts for presentations.
- Assign presenters to individual events, and ask them to give “morning after” reports.
- Work with the organizations which request presentations to customize your presentations to the audience and time available.
- Provide presenters with League outreach materials to distribute at events.

Californians make liberal use of the initiative and referendum processes. In recent elections, voters have had to prepare for ballots with as many as twenty state measures and in some instances many local measures in addition. The written material in ballot pamphlets, newspapers, and periodicals only adds to voters' sense of being overwhelmed. More and more they are asking Leagues to help them as election day approaches, and local Leagues respond with Pro & Con presentations about both state and local ballot measures.

A factor impacting the timing of our Pro & Con presentations is the great increase in the number of voters mailing in their ballots early in the election cycle. This creates pressure on Leagues to schedule their presentations as early as possible, such as just prior to the expected dates ballots are to be received by voters, in order to reach as many voters as possible.

Training of Presenters

With respect to statewide ballot measures, a great deal of very usable information is made available online by LWVCEF—visit the website <https://cavotes.org> . This material provides all of the information needed to do public presentations on the ballot measures, but strongly resist trying to “improve it” because this material has gone through an intensive review process. Our experience has shown that local editing can result in serious errors. Finally, in these publications there is no information regarding the position of LWV California on the ballot measures, as there should be no discussion of LWVC positions during our presentations.

Schedule at least two meetings for pro & con presenters to review each measure in detail, so that everyone understands the proposals and arguments for and against them. Recommend to presenters that they visit <https://cavotes.org> to obtain copies of LWVCEF’s Pro & Con publication and the related In Depth material so that they come to the meeting with some preparation and background. The actual presentation scripts can be derived from the Pros & Cons presentations.

At the first meeting, conduct a discussion and analysis of the ballot measures and decide which members will take on which measure(s). The training sessions should also include a review of your League's nonpartisan policies and how you will handle questions about League positions on any of the measures, as people at such presentations frequently ask for the League's positions, in support or opposition. Develop a script for how to handle questions about the League's support or opposition to a particular measure. Remember this is a voter service activity, not an advocacy one. Leagues can designate someone other than the presenter to answer such questions outside of the event, refer questioners to LWVC.org for information, or develop other ways to handle the situation.

At the second meeting, members should read or present a timed explanation of the assigned measures. Other members can both deepen their understanding of the measures and offer suggestions for better ways of presenting them. The discussion should lead to final drafts in outline or narrative form that will be copied and distributed to all presenters.

In your presentations, you may choose to cluster measures by subject rather than numerical order. Encourage presenters who feel the need for additional polishing to rehearse before fellow presenters, their families, the mirror, the video or tape recorder, or in the shower.

Formats for Presentations

Begin the presentation with an explanation that it is a citizen information activity.

In addition to opening and closing statements, presentations should follow a certain outline in the same structure as is set forth in the Pro & Con publication in the same structure as is set forth in the Pro & Con publication, including these points:

- whether the measure is an initiative, a constitutional amendment, or a bond measure and what the difference is;
- the question the ballot measure puts to the voter, for example: "Shall the State Constitution be amended to require...." or "Shall the people of California approve bonds in the amount of ...?"
- basic background information about the current situation that provides the context for understanding the changes reflected in the proposal;
- the major features of the measure, what would change if it passes, who would administer the changes, how voters, families, communities would be affected, and the project fiscal effects of the measure;
- the major arguments for and against the measure by the key groups who are supporting or opposing it;
- information about the major sources of funding for the individuals or organizations which are the major funders of the ballot measure campaigns for and against. This information is found on LWVC's Voter's Edge California (votersedge.org/ca), Cal Access (<http://cal-access.sos.ca.gov/Campaign/>), and the Fair Political Practices

Commission (<http://www.fppc.ca.gov>). Voter's Edge has the most easily understood format..

Presenters should choose their language carefully. The great challenge is to present complex matters in clear, simple language without skimping on the important policy issues at stake, and to give enough detail without giving too much. Define technical terms, jargon, and abbreviations in plain language if at all possible. Be careful in the use of statistics and round off those numbers that are crucial to understanding a measure.. Sometimes a chart or other visual aid will help to simplify a tangled issue.

To dissociate themselves from evaluations of factual material they can say, "the Legislative Analyst estimates..." or "Experts from ... have predicted that..." They should make it clear that the League does not vouch for the accuracy of any of the arguments for and against.

While the presentation itself must be made in a nonpartisan manner, it is appropriate to mention the key supporters and opponents, even when the League has a position, provided you present that information in a larger context: "This measure is supported by the League of Women Voters of California, the California PTA, and the California School Boards Association, while the following groups are in opposition:..." Do not explain why the League supports or opposes a ballot measure. Any discussion of that must be done outside of the Pros and Cons presentation because this is a voter service activity.

When there are a large number of propositions to be covered, it is normally best to have a number of individuals presenting the material. They can divide up the workload, take turns, and back up each other's knowledge and understanding of the issues. Having more than one speaker can add interest to what can be a somewhat dry and dull event. The format should allow some time for answering questions. If presenters do not know the answer to a question, they should feel comfortable saying so. They may offer to try to find the answer for the questioner if they have the spare time to do so.

Presenters should phone the contact person of their events a week in advance to verify the details: time, place, and directions; time allowance; size of group; the needs, interests, attention span, and expectations of group members.

The exact Pro & Con format may vary with the audience. Some meetings last for over two hours and cover all the measures in some detail. Others have a one-hour or less time limit, so the presenters must, in consultation with the group requesting the service, select which measures will be presented. Some groups may only want to hear about a certain category of initiative—environment, insurance, or health care, for example. If possible, bring enough copies of LWVCEF's Pros & Cons to go around to augment the oral presentation; audience members like to make notes in the margins. Some Leagues, however, find this distracting and hand out the written material after the oral presentations. All of this is, of course, subject to the size of the audience and the cost of printing enough copies.

Some members of the audience will want to argue the merits or shortcomings of certain measures. Presenters should not allow the presentation to turn into a general debate about the measure, and gently steer the discussion back to the League goal of providing impartial voter information.

Ask presenters to phone or email you with brief reports of their appearances and to offer their recommendations for the remaining events.

Candidate Fairs--Meet and Greets

Checklist for Candidates Fairs

For an event with as many details as a fair, it would be wise to design your own master checklist for the event and smaller checklists for the various subcommittee chairs.

A candidate fair is a broad community event that brings together candidates at one time to a central place where voters can meet them. This type of event can attract candidates who would otherwise refuse to participate in a candidate forum, and allows Leagues to avoid canceling candidate forums due to the existence of an empty chair issue. Such events might also be called candidate carousels or candidate speed-dating. In one structure, voters move from table to table, meeting candidates and their staffs, picking up campaign literature, obtaining information about registering and voting. In other structures, representatives of community groups host tables and the candidates move from table to table. It is a walk-through, rather than a sit-down event, though some fairs also schedule time for formal speeches and/or debates. Fairs are well-suited to elections that have many candidates and measures, particularly primaries. It may bring out those candidates who have been staying out of sight. In all fairs find a way to define which candidate is running for which office to avoid voter confusion.

General Guidelines:

- The board must decide, first, whether to work on the fair with cosponsors. While it means sharing the spotlight, it helps to lighten the burden of work and may attract a larger audience. Any cosponsors must not yet have endorsed (supported) or opposed any participating candidate.
- A fair is a big undertaking with many jobs to fill in the areas of planning, finance, publicity, personnel (greeters, escorts, timekeepers etc.), decorations, setup and cleanup.
- Before selecting a date, check the schedules of the Chamber of Commerce, PTAs, etc. You don't want your fair to conflict with a major event like the homecoming game, and you want your event added to their master calendars.
- Select a site that has enough space, protection from the weather, and a central location. Malls are ideal. You can expect good support from local businesses, who appreciate the increased foot traffic. Campuses are another good location. So are festivals and other events that draw a crowd. Since primary elections occur in June, the dry season in most of California, you can consider an open air location.
- Fairs require a long lead time to avoid conflicts with other events. Once you decide to undertake the project, secure the location immediately. Invite the candidates as soon as they have filed for office (about three months before the election). The invitation should be in writing and should define how the fair will be organized, what candidates may bring with them, and any other item that should be understood from the outset.

- Weekends offer special benefits for a fair, including the presence of children. If you want a more adult atmosphere, schedule the event for an evening.
- Invite all candidates. You will be offering a unusual opportunity for voters to meet candidates from the minor political parties. If there will be ballot measures, include proponents and opponents. Obtain addresses and phone numbers from the registrar of voters or from the political parties. Use a self-addressed postcard, follow-up phone call, or return receipt requested letter to ensure that candidates have received your invitation..

<p>Note: Remember, before inviting candidates for federal and state constitutional offices, find out whether LWV California Education Fund is planning a debate or other activity in those races. Check also with neighboring Leagues to explore ways to work cooperatively on races that you share.</p>
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- Invitations should include detailed information. For example: deadlines for applications and fees, size of booth/table, contact person for the event, speaking time and schedule, maps, ground rules about bumper stickers, demonstrations, etc.
- Other details to be covered in your planning: fire safety, security, parking, insurance. If there will be speeches, you will need a sound system, podium or platform, and perhaps seating. Consider a high school band or other music to add a festive atmosphere. Don't forget that the mall, festival, etc., must be consulted on all such details.
- You will certainly want to have a League presence, with membership information and League publications. Fact sheets pertaining to the election or the election process and voter registration forms would also be appropriate.
- If an election fair is a regular event for your League, keep good records and checklists for future reference.

Other Election Information Ideas

Election Preview

An Election Preview is a display of election information: pictures of candidates, biographical information, campaign literature, and other information about registering and voting. The League staffs a table or booth so that citizens may ask questions about boundaries, ballot measures, registration, and voting. To help fund the project, candidates are charged a fee for participating. Businesses in the area, for the goodwill and foot traffic the display brings with it, may give money or in-kind contributions.

Telephone and Website Service

League phones or League websites and social media turn into voter information hotlines as an election approaches. Some citizens use the League as a virtual extension of the elections office. Voter service's preparation for such a demand on the League should include the preparation of a binder for phone volunteers to use as the questions pour in.

The election information most often requested is:

- election calendar with deadlines for registering and filing, the dates of debates, TV programs, fairs, and the dates for request for vote-by-mail ballots and early voting.
- phone numbers: candidates, parties, ballot measure proponents and opponents, city or county elections office, sponsors of campaign events; sites for registering to vote.

Remember that most of the information requested can be found on various websites including: Voter's Edge California, your own League's website, LWVC websites, on the Secretary of State's website, and your local county elections office site. Set up a list of applicable websites for use by your volunteers.

Consider extending the hours that your phone is staffed during the final week before the election. Many voters get themselves organized only at the last moment. They frequently see the League as the one place they can count on for help.

Written Materials

Leagues often prepare special materials to assist citizens with the task of voting based on the special needs of the voters and local League tradition. Consider some of the publications described below.

Local Pros & Cons

As noted above, LWVCEF publishes ballot measure Pros & Cons for the state general elections. Some Leagues publish their own Pro & Con on local issues in elections where there are so many local issues that the voters need special assistance, or the local issues are of particular complexity or significance, or the politics whirling around the measures have seriously confused the issues and the voters.

A local Pros and Cons publication can be formatted in the same way the state level publication is. City attorneys and county counsels produce analyses of proposals. Obtain copies of those (or find them in the Sample Ballot or Voter Information Guide produced by the local elections offices) for use as the basis for your publication. Gather information from websites, social media sites, magazine and newspaper articles, columns, and letters to the editor to further develop the information. See “Writing a Local Pro & Con” in the members only page.

The reputation of the League has been built on publications that are really accurate and totally nonpartisan. You need to be sure that your League has the resources to maintain that standard. You can be certain that the voters will be grateful to have this valuable tool, and the impartial information you provide may affect the outcome of the election.

Voters Guides

LWVCEF is a partner in Voter’s Edge California (<http://votersedge.org/ca>), which provides a wide range of information about elections and election processes and procedures. On this site voters can input their address and see what the ballot for their location will look like. With Voter’s Edge California, voters can:

- Access their full, personalized ballot by entering their address.
- Get in-depth information on candidates, measures, and who supports them.
- View candidate biographies, top priorities, answers to questions, photos, policy videos, endorsements, and detailed information about who funds their campaigns.
- Browse unbiased explanations of ballot measures; find out who supports, opposes, and funds them.
- Check where, when, and how to vote, including information on their local polling locations.
- Keep track of their choices to make voting easier.

- Share information about the election with friends and family.

Finally, Voter's Edge has the functionality for candidates to be able to directly input information about themselves and their campaign.

LWVCEF also sponsors another voter information website, Easy Voter Guide, <http://www.easyvoterguide.org/>. The Easy Voter Guide is published in multiple languages both online and on paper. The Easy Voter Guide is offered to local Leagues for free with some limits on quantity. It is also sold to Leagues and organizations that wish to purchase them.

Candidates Questionnaires

Candidates questionnaires are another kind of voter guide. They are used more effectively in local elections. They can provide comparative information that is available nowhere else. The format forces candidates to address issues succinctly, including issues they may be avoiding. Their responses provide a common basis for evaluating those running for office. Voter's Edge California contains questions to candidates at the federal and state levels. Leagues are urged to offer questions to their local candidates to be used on Voter's Edge and to be used in local publications.

- Decide how and with whose guidance you will develop the questions. You need to identify relevant issues that are of particular interest and concern to the community. The wording must be free of any hint of bias and the questions must be approved by the board.
 - Questionnaires to candidates must include explicit instructions about word limits, deadlines, and permission, SIGNED BY THE CANDIDATE, to publish the responses. Let candidates know what the consequences will be for overlong answers and late returns. (If you are having trouble deciding what constitutes a word for your word count, ask your local registrar for the word count guidelines used for ballot statements.)
- Mail questionnaires by return receipt requested.
- Pad your timeline for tardy replies, giving some consideration for the unavoidable chaos that campaigns have to cope with, but be firm as the absolute deadline approaches. It is sometimes necessary to print next to candidates' names, "No reply received by publication date."
- Reminder phone calls a few days before the deadline is a chore that helps to protect the planning and effort you have already made.
- Keep a log in which you record the date you mailed questionnaires to candidates, the date you received the return receipts, each phone call or fax message, out-going or in-coming, and any other contacts made. Carefully-maintained records will back up your version of the facts should the League's process be challenged by any candidates.
- Consider including in the guide additional information about the election, the League, and the ground rules that you asked the candidates to follow. Be sure to give credit to any underwriters.
- Give careful consideration in your planning to distribution of the guide. Ideally, every voter should have one. Consider having it reprinted in local papers or doing a large mailing. Do a press release that announces the places where it can be obtained.

- Remember to provide copies to the candidates and to file some away for the League's future reference.

Television Coverage

Television Checklist

- Approach stations four months before election day.
- Develop an agreement that includes the number of programs, format, and assignment of tasks.
- Contact candidates early to secure commitments.
- Develop scripts for on-screen workers. Consider training sessions or trial runs to produce a professional look. Contact other Leagues in large district races.
- Work with local media to feature the airing dates for the League's election coverage.

Working with a local government channel, a local cable company's community access channel, a public TV channel, or a commercial station, Leagues can present candidates and issues to the voters in a way that complements or perhaps even replaces some traditional formats. The menu of choices can be expanded to include personal interviews with candidates, tapings of speeches and press conferences, call-ins, Pros & Cons presentations, and forums.

Note: The Federal Communications Commission and the equal opportunity rule state, "whenever a broadcaster or cablecaster permits any legally qualified candidate for any public office to 'use' a broadcast station or cable facilities, it must allow all other legally qualified candidates equal opportunities for us." The responsibility for compliance lies with the broadcaster and cablecaster, but Leagues are well-advised to consider the FCS ruling. in planning debates, interview, and other election events for TV.

Getting Started

The first step is to arrange a meeting(s) with someone with decision-making authority at a station to explore what your mutual interests are. For example, the station needs the League to protect it from political manipulation in its election coverage and the League needs the station, with its equipment and experience, to produce a professional-looking product.

Review the election year and negotiate which issues and races will be covered, how long each segment can be, how many participants the studio can manage at a time, and what kinds of resources can be committed to the productions. Resources include:

- the location: whether the event will be held in an auditorium or a TV studio and whether an audience will be present

- time allowance: how many races and measures can be covered? The cameras and camera operators, the set—furniture, backdrop, lighting, set-up crew, other equipment—microphones, remote trucks, editing machines telephones—can the format be a call-in program?
- personnel—scheduler, publicity, on-camera talent, timekeepers, trainers—for League off-screen and on-screen personnel.

Some Special Considerations

TV stations make their plans far in advance. For a November election, you should firm up your agreement _____ in _____ August.

- Put your agreement, called a Memorandum of Understanding (MOU) with its details in writing, so that the roles are clearly defined. Be sure to include an item relating to who owns any recording of the event, what uses of it are permissible. Generally, such an agreement is that the entire recording can be used, that candidates may not use it or parts of it, and sometimes television and radio stations wish to use parts in their news programs.
- Discuss contingency plans for candidates for office and proponents or opponents of ballot measures who decline to participate or fail to appear. In some circumstances, it would force cancellation of the event. (See notes about federal regulations on page __ & __.)
- You must consider how to handle races with numerous candidates, more than the studio can accommodate.
- Contact neighboring Leagues if the contests include their geographic areas as well as yours. You may be able to share both the tasks and the products.
- If League members will be moderating the programs, prepare scripts as guides for them, with introductory remarks, questions (more than you think will be needed), and closing remarks. The moderators may not need to read the scripts, but they should have them to fall _____ back _____ on.

Election Day and After

In your discussions with the station, consider election day coverage as the returns come in and post-election coverage such as interviews with winners, analysis of the outcome, etc. You can give local issues the attention that the network affiliates won't, and the League is the organization to do the political coverage free of any partisan agenda.

Getting Out the Vote

Registering voters and educating them on the issues are two-thirds of the job. All too many voters will need reminding, encouragement, persuasion, and even physical assistance with the act of voting itself.

Work with your board and publicity director on an approach that is appropriate to your local needs, and the resources your League can commit to such a project. Consider joining forces with other respected organizations on a get-out-the-vote effort.

Consider the use of editorials, letters to the editor, ads (including your LWV phone number), posters, social media campaigns (including texting voters), call-in-shows, PSAs on radio and television, stuffers in bills and paycheck envelopes, messages on grocery bags, banners across the main street, fliers, and even door-to-door, person-to-person contact.

Your publicity might include a number to call for those who need rides to the polls. A flier that explains how to vote by mail or vote early would be helpful, and especially appropriate in certain areas, like college towns. Keeping the telephone staffed in the final days before election can help voters through obstacles that they find frustrating or intimidating.

Voting can be seen as a duty of solemn and momentous importance or as a joyous act of affirmation and self-assertion. In emphasizing the seriousness of voting, don't forget to spice your efforts with that aspect of voting that is funny and fun. The positive, light-hearted approach is often the more powerful.

Conducting and Monitoring Elections for Community Groups--Please note this section is here to offer general guidelines. State law on homeowners elections is ever changing and must be consulted before agreeing to anything.

Background

Leagues are often asked to assist in conducting or monitoring elections for community groups and small districts: for example, student government associations, community service districts, Indian tribes, homeowners associations, and Senior Legislature districts. For some local Leagues, contracts for such activities provide significant revenues which provide much needed financial resources to help run the League.

The board will need full details about what will be required before it approves such a request for League election services. The involvement of the League can mean the difference between success and failure, and between acceptance or rejection of the election results, so election services can greatly enhance the standing of the League in the community. On the other hand, boards must enter into these contracts with their eyes wide open, because they may be hit with some of the political mud that gets slung around, even (or especially!) in these "minor" elections.

Many of these elections are guided by state law, so make sure you know the relevant law. Many times the organizations themselves know the law but check anyway. Consult a lawyer who knows the field if there is uncertainty or questions about the law.

Information Needed

It is best practices to request the following information when you receive the initial inquiry:

- Full name of contact person, their position in the organization (i.e., board president, property manager, etc.) and contact information
- Name of organization, HOA or education institution
- It is recommended that you gather information about the voting population, procedures, voting methods, etc. to get a scope of what will be required from the League.

Find the answer to these questions before bringing the request to the board:

- Has it been done before? Are there any files or records of past elections for this group or district? Does the organization have election bylaws, or will you have to start from scratch?

- Who will be in charge of the election committee? What will be the balance of power on the committee? Will the organization appoint members to the committee and share in the work?
- Is there time to plan and carry out the plan in a meticulous, League-like manner?
- Scope of services: How many volunteers will be needed to carry out the election? Do you have print ballots? Mail election notices? Manage a voting center? Count ballots? Do you qualify/confirm candidates? Are election observers allowed?
- A League should definitely require a material fee for its service, proportionate to the amount of time and human resources which are required by the project. Additionally, the League should be assured that its expenses will be fully covered?

Process of Assessing Fees

Using the information from the inquiry, prepare an estimate by calculating expenses. Here are some items to keep in mind:

- Postage and envelopes if you are mailing notices and/or ballots
- Paper, printing and supplies
- Direct labor, volunteer stipends, reimbursements, etc.

When the prospective client accepts the prepared estimate, have them sign and return it.

Organizing the Election

- Using the estimate and the scope of the services, draft an agreement. Obtain a written agreement on the election plan. It should define who is responsible for which tasks and which expenses. Make sure that the role of the League is clearly defined to your satisfaction. Don't start organizing the election without such a written agreement.
- Some organizations and districts are poorly organized and have not carefully considered the details before seeking the League's help; in fact, that may be why they need the League's help.
- Then work out a detailed plan and budget for the election and put it into writing. The plan should include a calendar with target dates, counting backward from election day.
- Review your plan with someone experienced. In some elections, an appropriate consultant would be the county clerk. It would also be very useful to consult with other local Leagues which have experience in this area. There may be details you have overlooked that can cause a lot of trouble later. Changing the rules of the election in midstream can threaten the credibility of the entire project.

Clarifying Participation

The League might be playing any of a number of roles:

- full monitoring of the election

- full administration of the election
- assistance with writing election bylaws or procedures
- certification of candidates
- certification of voters
- counting ballots and certifying and announcing results
- providing materials: petitions, ballot statements, ballot boxes, ballots, tally sheets, sign-in sheets
- translation of election materials or arranging for interpretation services
- coordination of a candidate meeting, moderation of a candidate forum
- cleaning up and putting things away after the election

Establishing the Election Rules

The types of elections will vary between public agencies, commercial entities, labor unions, educational institutions and homeowners associations. There are primarily two types of election procedures, vote-by-mail and on-site voting centers. In some instances clients may request a combination of both.

Once you have determined what rules will guide the election, print them and make sure that they are distributed to those who might be affected by them. Rules include:

- definition of the offices that are open, duties, term limits, pay/ compensation for expenses, etc.
- eligibility of voters, identification requirements at the polls
- eligibility of candidates
- filing procedures and dates and who will process filing forms
- petition-gathering procedures and who is eligible to sign petitions
- which errors are serious enough to disqualify candidates
- dissemination of information to voters: who is responsible
- absentee voting requirements and procedures
- size of vote margin needed to win
- circumstances under which a run-off will be required
- procedure for challenging the election and how it was conducted
- rules for observers in the voting center
- electioneering restrictions
- procedure for processing ballots, ballot counting and certifying results
- process for certification of results
- volunteer guidelines for administration of the voting center

It is considered best practices to create instructions for voters that provide an overview of the election process and the contact information for the League.

Establishing Election Day Rules

Finally, you need to establish the details for election day itself:

- location of polls and the hours they will be open
- assignment, training, and shift schedules of poll workers
- ground rules for poll watchers
- instructions provided to voters when they appear
- procedures for identifying eligible voters and challenging ineligible voters
- procedures for provisional voters and whether its permitted
- procedures for dealing with spoiled ballots
- whether write-in votes will be permitted
- provision for counting ballots and whether observers may be present
- rules on electioneering
- form to use for certifying election results and announcing them, who will sign the form and make the announcement.

Finishing Up

After the election, sign the certification of results and send/give to the client for signature. Keep a copy of the certification for your League's record.

A report should be prepared for the files of the League and also for the organization or district that held the election.

The report for the organization should include all ballots submitted, a copy of the signed certification of the results, the ballot counting tally sheet and any relevant election documents. These documents should be put in a clasped envelope and sealed. The sealed election documents should be kept by the League for six months before being returned to clients (unless governing documents state otherwise) or retained by client for the same amount of time.

The report for the League's record should include a copy of the election estimate and agreement, notes or log kept through the election process, a copy of all election notices sent by the League (if applicable), a copy of the ballot and results, and an assessment of the League's administration. The assessment should note recommendations for future projects of this nature or with this organization.

It might be a good idea to also ask the organization for an assessment of the League's services. This helps for future projects and can also be used in marketing material for the League.

Sample Written Agreement Covering Election Services

Date

President
Organization
Address, etc.

Dear Sir or Madam:

Thank you for your engagement of the League of Women Voters of _____ for election services for an election for the Board of Directors on (date). We look forward to working with you on this election.

Members of the League of Women Voters of _____ (LWVXX) will serve as the Inspector for your election if we receive the documents requested, most particularly the bylaws governing the election, the notice of the election and a sample ballot, and the list of eligible voters, along with any necessary identifying information such as address, shareholder identifier or other information that is required to verify the voter's identity.

In that capacity we will provide the following services:

1. Receive the ballots at the LWVXX post office box: PO Box 6787, Ventura, CA 93006.
2. Verify the Ballots: The LWVXX will verify the ballots received against the list of eligible voters provided by the Corporation and identify any invalid ballots, that is, those that do not comply with the requirements of the bylaws. We will begin this process once ballots are received in the post office box and complete it at the time specified in the notice for receipt by mail.
3. Hand Counting of Ballots: At the (date) meeting, the LWVXX will announce the number of ballots received and whether they will constitute a quorum under the bylaws. Votes shall be counted and tabulated by Inspector(s) of Election in public at the open meeting of the shareholders. Any candidate or other shareholder of Cabrillo may witness the counting and tabulation of the votes. We will have a minimum of three LWVXX members present to expedite the process of opening the ballot envelopes, counting votes and verifying the tally.
4. Certification of Election Results: After all votes are verified and counted, the results of the election will be certified by the LWVXX.
5. Custody of Ballots. The sealed ballots at all times shall be in the custody of the Inspector(s) of Election or at a location designated by the Inspector(s) until after the tabulation of the vote, and for one (1) year thereafter at which time custody shall be transferred to _____. If there is a recount or other challenge to the election process, the Inspector(s) shall, upon written

request, make the ballots available for inspection and review by a _____ shareholder or his or her authorized representative. Any recount shall be conducted in a manner that preserves the confidentiality of the vote.

Our charges for election services are \$25 per hour per League election worker, including the time preparing documents and verifying ballots received. Charges will include any preparatory meetings and travel time as well as the election meeting.

In providing these services, the League of Women Voters of _____ is relying on the Corporation to provide an accurate list of eligible voters, comply with the required procedures for nominations, notice of the elections, and to provide LWVXX with accurate information about the Bylaws and Rules which govern its elections. It is the responsibility of the Corporation to interpret its governing documents and conduct the election in a lawful manner.

The LWVXX is not providing legal advice and shall not be liable or held responsible in any way should controversies arise about the election procedures or the eligibility of a voter. The Corporation agrees to defend, indemnify and hold harmless the League of Women Voters of _____ from any and all claims which may arise from or relate to the services provided herein.

Thank you again for the opportunity to provide our Independent Third-Party election services. If you have any questions, please do not hesitate to call me at (phone number). Please sign and return this engagement letter to us at your earliest convenience so that we can proceed to recruit members to work on your election. Please provide us with a contact person and phone number should questions arise during our preparatory work.

Sincerely,

Name, title

(This sample written agreement was provided by LWV Ventura County.)

Finishing Touches

In a professionally run organization there are some housekeeping details that should mark the end of the year, particularly if it is also the end of your term of office:

- Prepare a report for the president and the voter service file, including an evaluation of the year's successes and failures and any words of wisdom you may have for future voter service directors and boards.
- Recognize efforts of your committee and crew with a potluck or a lunch out; to review the projects of the year and pat yourselves on the back; or, more simply, write notes or make phone calls of appreciation.
- Return the voter service file to the League files in good order, perhaps in even better order than you found it. Discard what is useless (transfer papers of historical interest to the archives), and add materials that would have been helpful to you had you had them.
- Review the voter service job description and update it, if necessary. One copy should go to the president, another to the file of the nominating committee, and a third to the voter service file.
- Send thank-you notes to those whose efforts and contributions have been significant to your success.
- Report to state League voter service chairs to help them compile statistics, use your experiences in training other local Leagues, and use the evidence of your contribution to further LWV Education Fund fundraising efforts.