



**League of Women Voters of Massachusetts  
Citizen Education Fund**

# **Moderators' Handbook**

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# **The League of Women Voters of Massachusetts Lotte E. Scharfman Memorial Citizen Education Fund**

## **Our Mission**

The League of Women Voters Citizen Education Fund is a nonpartisan public policy educational organization that: builds citizen participation in the democratic process; studies key community issues at all government levels in an unbiased manner; and enables people to seek positive solutions to public policy issues through education and conflict management.

The League and the Citizen Education Fund never support or oppose any political party or candidate.

## **Our Diversity Policy**

The League of Women Voters of Massachusetts is committed to reflect in its principles and practices the diversity and pluralism in our state.

In both its principles and practices, the League of Women Voters will promote inclusion in leadership, staffing, membership, and participation in any League activity. There shall be no barrier based on race, ethnicity, national origin, creed, gender, sexual orientation, gender identity and expression, disability, attribute, or age.

The League acknowledges that pluralism and diverse perspectives are fundamental to the values the League upholds and are necessary for responsible and representative decision-making.

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## Introduction

Moderators provide an invaluable service to the community by presiding over forums whose overarching goals are to provide a *fair, informative, respectful, and inclusive* platform for candidates and others to present their views to the public. Moderating a candidates or issues forum is a unique and significant skill and a most rewarding community service.

Well-trained moderators facilitate a fundamental of democracy – reasoned and respectful discourse. The competence and fairness of League-trained moderators over the years has contributed to the high level of public trust the League of Women Voters enjoys.

A League moderator represents our organization to the candidates, speakers, media, and the public and

should always be mindful of the need to protect the League’s image and integrity as well as the moderator’s reputation. Careful preparation and adherence to the League’s nonpartisan policy and established goals, format and ground rules for a forum are essential for a strong moderator.

This Handbook is designed to help League members who plan to represent the League as moderators of candidates and issues forums sponsored by the League and other organizations.

Whether you’re new to moderating or a veteran of many forums, this Handbook will guide you as you plan and prepare for your job as a League moderator.

## Training

Essential tools for a good moderator are training and detailed preparation for each event. The League of Women Voters of Massachusetts periodically offers workshops on moderator training. These training sessions, held in a supportive setting among League peers, are often featured at LWVM’s Fall Conferences, Councils and Conventions.

Keep your eye out for announcements in the Massachusetts League Leaders Update and the *Massachusetts Voter*. You can always contact the LWVM office (617-523-2999, [lwvma@lwvma.org](mailto:lwvma@lwvma.org)) to find out when the next training sessions are scheduled.

Before trying your hand at moderating, attend as many League-sponsored forums as you can to watch a skilled moderator in action. Helping your League to plan a forum and participating as a question sorter, timekeeper or usher can also give you experience that will be tremendously valuable when you accept an invitation to moderate a forum yourself.

Another way to learn more about moderating is to talk to experienced moderators. League members are

happy to share their skills and knowledge, and you’ll be able to work with them at an LWVM moderator training workshop. The LWVM office can also put you in contact with veteran moderators who can answer your questions and give you advice when needed.

As part of your training, make sure you’re thoroughly familiar with League procedures and especially with your League’s nonpartisan policy.

You should consider the first few forums you moderate as part of your training. As a novice moderator, you’re probably better off getting your feet wet moderating a straightforward local issues forum, with a small panel of speakers, than diving right into, say, a candidates’ forum with five political hopefuls in a contentious primary race for state representative. This Handbook, a League moderator training session and your own groundwork and experience will prepare you for almost any moderating job.

## Before You Accept a Job

The wisest policy, *except in very special circumstances*, is to moderate in a district other than where you live, whether it is a League event or sponsored by another organization. You should be cautious when accepting invitations to moderate. Before accepting an offer, you need to ask the sponsor and yourself a number of questions.

### Questions for the Sponsor

- **What are the forum's goals?** You don't want to accept an offer to moderate until you're sure the sponsor has done enough planning so you both understand what the forum is supposed to accomplish.
- **In the case of a candidates' forum, will it be nonpartisan?** It's OK for you to agree to moderate a forum for an organization – for example, a party's town committee – that plans to decide after the forum to endorse one of the candidates. However, it violates the League's nonpartisanship if you, representing the League, moderate a forum for a sponsor that has already endorsed one of the candidates.
- **In the case of an issues forum, will the forum present a balanced view, with speakers discussing all aspects of the issue, or will it present only one side?** While you can moderate a single-sided forum for a sponsor that has already taken a position on the issue, think carefully about how your moderating will affect the public's perception of the League. It's crucial that the public be fully informed that this type of forum is being presented to influence citizens, not to educate them. If a League has decided to take action on an issue and is sponsoring a one-sided forum, it is even more important that the public understand the difference between League citizen education activities and its action activities.
- **What are the forum's ground rules and format and the criteria for deciding whom to invite to participate?** These all should be de-

signed to inform the audience, be fair to all candidates/speakers, and be inclusive. (See "Forum Essentials" on the next page.) You can and should decline to moderate if you're not comfortable with the forum's structure and the sponsor is not open to changes. Your own credibility and reputation as well as the credibility and reputation of the sponsor and the League can be damaged if the forum is perceived as unfair or poorly managed.

- **Is the forum open to the public or by invitation?** If the forum is by invitation, be sure that that the guest list is nonpartisan.
- **Do the sponsors understand the federal laws and regulations governing candidate debates**, especially "empty chair" debates, and Internal Revenue Service rules that apply to debates sponsored by organizations designated as 501(c)(3) by the IRS? League-sponsored debates are governed still further by the League's nonpartisan policy. Although legal challenges are infrequent, debates are high-stakes campaign activities and candidates who believe they have been hurt politically may challenge debate sponsors under these laws. For more information about these laws, see LWVM's "Guidelines for State and Local League Debates" (Appendix A; also online at [www.lwvma.org/guidelinesfordebates.pdf](http://www.lwvma.org/guidelinesfordebates.pdf)).

### Questions for Yourself

And last but far from least, before accepting an invitation to moderate a forum you need to ask yourself one question – and answer it with an assured yes. **For a candidates' forum, are you politically neutral and free of any identification with a candidate's campaign? For an issues forum, can you be truly unbiased about the issues under discussion?** You should agree to moderate only if you're sure you can be absolutely nonpartisan, unbiased and objective. Your reputation, the sponsoring organization's reputation, and the reputation of the League of Women Voters are all at stake.

# Forum Essentials

Moderators are sometimes asked for advice about format, procedures, ground rules, and invitations to candidates and speakers in addition to moderating. This is a good opportunity to share your expertise. Even if you're not formally asked for advice, once you've agreed to moderate, the sponsor must keep you up to date about details of the forum and pertinent information about the candidates, speakers and the political situation. The sponsor is responsible for publicity, security, site selection and choosing and communicating with all forum participants.

The following covers the essentials that make for a well-managed forum.

## Who Participates?

At the very earliest stage of planning, the sponsor should establish criteria for determining who to invite to participate in the forum, whether it is candidates running for office or speakers on an issue.

Clear criteria, fairly applied, can prevent future problems. For a candidates' forum, the criteria should cover which candidates will be invited to participate – everyone on the ballot in a contested race, for example. Or will the forum accommodate unopposed candidates as well? The criteria should also make clear under what circumstances write-in candidates would be invited to participate.

For an issues forum, the criteria should detail how speakers will be selected.

The letters of invitation to candidates/speakers should include details about the forum: who is being invited to participate, the ground rules and the format.

## The Venue

The location for the forum should be handicap accessible. Convenient parking and access to public transportation are also pluses.

Attendees should be able to hear and see the speakers. Good sightlines, a reliable sound system and comfortable seats are all important to a successful forum.

## Forum Format

There are countless ways for a forum to be organized. Answering the following questions will go a long way toward determining how a forum will be run.

- How long is the forum to be? What is the timing for each segment?
- How will the order of speaking be decided? Toss of a coin, alphabetical or draw lots?
- Will the participants be given time for opening statements and closing statements? How much time will they have for each?
- How will the order of opening and closing statements and responses to questions be decided to ensure fairness?
- How will questions be asked of the candidates/speakers?
  - Written questions from the audience, collected, sorted, then given to you to ask?
  - Prepared in advance by the sponsors?
  - Oral questions from the audience? From newspaper reporters or panelists?
  - Call-ins by phone or questions accepted via email, prior to or during the event?
  - Will there be follow-up questions asked of the candidates/speakers?
  - Will the candidates/speakers be allowed to cross-question each other? Will there be rebuttals?
  - A combination of any or all of these?
- What personnel are needed to help run the forum: timer, question sorter(s), ushers?

Though there are many ways to organize a forum, the goals should always be the same: it should be fair, informative, respectful and inclusive.

## Preparation, Preparation, Preparation

As moderator you have many responsibilities, so to make the process easier, start your preparations as soon as you accept the job.

### The Timed Script

The best preparation for moderating a forum is to prepare a timed agenda and script with detailed elements. You, of course, will need to work with the event sponsor to fill in all the particulars. Since the elements are very much alike from one forum to the other, save your material to make life easier. See Appendix B for a sample timed agenda and script.

Your script should contain these basics.

- Opening remarks if you're asked to do this, though they're usually made by an officer of the sponsoring organization. The remarks should include the purpose of the forum, the League's nonpartisan policy, information about the sponsoring organization, housekeeping information and announcements.
- In a candidates' forum:
  - Explanation of how candidates were invited and provided with the forum's ground rules. If a candidate is unable to attend, then an explanation should be given. If any candidates decline the invitation, state that they *chose* not to attend. Keep in mind the laws and regulations about empty chair debates and the League's own "Guidelines for State and Local League Debates." Explain arrangements for unopposed candidates.
  - Description of offices to be filled, terms and duties.
- In an issues forum:
  - Explanation of how speakers were selected to participate and provided with the forum's ground rules.
  - *Note:* If this forum has been organized and advertised as an informational forum, then all sponsors, including the League, should not answer *any* questions on their position on the issue, if

they have one, at this event. Taking an active position on an issue must and can be done in another forum.

- Description of the format, timing, ground rules and how questions will be handled.
- Introduction of the candidates/speakers in their seating order and other possible participants, for example, panelists who will ask questions, the timekeeper(s) and the ushers.
- Explanation of how the question-and-answer period will be conducted, for example, if written questions will be sorted.
- Introduction of the question sorters, if necessary, with explanation that ushers will give them the questions from the audience to sort for duplicate questions, combine similar questions, and eliminate personal comments or questions not relevant to the office or topic.
- Warning that no personal attacks from candidates, speakers or the audience or audience campaigning will be allowed, explaining that attendees want to hear the candidates/speakers.
- Reminder to the audience to hold applause to give speakers their full time.
- Schedule of the order of speakers' opening statements and introductions. Explain that statements will be timed. Here the issue of fairness is most evident. Strict adherence to timing is essential.
- Start of the question-and-answer period. Remind the audience that questions should be brief and end with a question mark. They should also be to the point, not of a personal nature and relevant to the office or issue.
- Explain that questions and/or answers will be timed, if applicable. This is most likely the trickiest part of any forum and needs careful preparation. Again, fairness is paramount. Giving one candidate or speaker more time than another or failing to vary the order of questions are probably the causes of more complaints than any other kind. A question-



and-answer grid and an alert timer will keep you on track. See Appendix B for a sample grid.

- Schedule of the order of speakers' closing statements, if applicable, clearly timed.
- Closing remarks, to include thanking everyone for coming, thanking those who organized the forum, and if applicable, a reminder to vote and the date of the election!
- Turn over forum to sponsor, if appropriate.

### Keeping Informed

It's crucial that the forum's sponsor keeps you well informed about all the preparations for the event. You also need to be aware of all the issues and any difficulties that may affect the forum. Be sure that you have the following in plenty of time before the forum to be fully prepared.

- Copies of invitations and any other material sent to and received from the candidates/speakers
- For a candidates' forum:
  - Names of candidates who have accepted and any panelists asking questions, with name pronunciations
  - Names of candidates, with pronunciations, who have declined and their reasons
  - Pertinent biographical information and the offices being covered in the forum
- For an issues forum:
  - Names, with pronunciations, of speakers who have accepted and what role they're playing in the forum. For example, whether all will be providing information about various aspects of the topic, or, if the forum is presenting the pro and con sides of any issue, who is

speaking in favor of and who's speaking against.

- Pertinent biographical information of the participants
- Background information on the topic, including who in the community is politically active on the issue
- Any changes in format or arrangements
- Directions to site and a possible tour
- Description of the room set-up, including a seating chart for the candidates/speakers and you and any special seating for the sponsor or other officials; where microphones will be placed, if they're being used; arrangements for cable or radio, etc.
- Newspaper clippings or other information about the races or issues, especially in a contentious situation
- Names of forum personnel (timer, ushers, question runners, question sorters, someone posted in the back of room to signal if audience can't hear, etc.) and assurances that they've been briefed on their roles
- A schedule detailing:
  - the time that you should arrive at the site to meet with sponsors and forum personnel to check arrangements and get any last-minute information (at least 30 minutes prior to event)
  - the time you will meet with the candidates/panelists to go over ground rules, format, answer any questions, put them at ease and to subtly convey that *you* are in charge (at least 15 minutes prior to event)
- Any additional information the sponsors think you should have to ensure a smooth and trouble-free forum.

# The Time Has Come

Pack up your moderator's kit: your timed script, the question grid, notes, additional information from the sponsor, seating chart, site directions, gavel, small clock or large watch, and cough drops. Give yourself plenty of travel time to arrive at the site at the agreed-to time or at least 30 minutes before the forum is scheduled to start.

## 30 Minutes to Starting Time

- Meet the sponsors and forum personnel: timers, sorters, ushers, and runners. Review their roles and responsibilities. Make sure you, the sponsor and the timers all have the same timed agenda.
- Get any last-minute changes or information.
- Go over arrangements: sound check, water and name cards on table, timer in view of you and candidates/speakers, candidates/speakers in your sight.
- Check with camera crew.
- Set up the podium so your material is in order, your watch is in view and you have water, paper, and pen.

## 15 Minutes to Starting Time

- Call candidates/speakers together. Introduce yourself and put them at ease. Be pleasant, forthcoming and confident, letting them know firmly that you are in charge.
- Review ground rules, format, re-check name pronunciations, answer any questions.
- Explain the plan for alternating questions.
- Be sure candidates/speakers understand timing signals and where timers are seated.
- Revise your seating chart and grid, if necessary, but never at the direction of candidates or speakers.

## 5 Minutes to Starting Time

- Get candidates/speakers seated.
- Check that microphones are working.
- Be sure all forum personnel are in place.

## The Forum

Follow your script – it should be smooth sailing from here!

Some moderators are given discretion to make changes in the format after the forum has begun. This often involves giving an eager audience additional time for questions. This might not be possible if the forum is cablecast (although the question period could continue after the camera is off). In any case, the moderator should *first consult* with the sponsor and the candidates/speakers to make sure all agree to any changes.

Remember that a skillful moderator presides, restrains, referees and exercises a *moderating* influence over the proceedings without coming off as a dictator. If the proceedings appear to be getting out of hand, a light touch can smooth a rough situation. You have the authority to call the forum to order, speak directly to a disruptive audience member or speaker, or call people out of order. You can pound your gavel, call a recess, banish the obstreperous from the room, or as a last resort, adjourn the meeting (a rare but not unheard of occurrence). Few candidates or public speakers want to embarrass themselves, and often the audience can shame the shameless.

The success of a forum depends heavily on the moderator, who must keep the meeting within the ground rules and the time limits and in accordance with the agreed-upon format. The moderator must keep the forum from becoming a free-for-all with participants shouting over the others and must prevent personal attacks by either the candidates/speakers or the audience.

Appendix D offers a number of suggestions on how to deal with a variety of difficult situations.

## Tips for Moderators

- Clothes for television: Solid colors, other than white, are less distracting to audience and cameras, and no jangling jewelry. Blue shirts with quiet ties are best for men.

- Conduct the meeting in a polite, friendly manner, but be assertive enough to break in and keep the candidates/speakers on track.
- Once candidates/speakers have begun to speak, do not interrupt, unless the remarks constitute a personal attack or are exceeding the time limit.
- Jot down the gist of audience questions in case you have to repeat any. If the sound system should go awry, repeat each question so everyone hears, and ask all to speak loudly.
- If you believe that a speaker didn't hear the question, you may repeat it.
- When a question is directed to only one candidate/speaker, all should be asked to answer if that was the rule established. When questions are addressed to "any" candidate/speaker, all should be allowed to respond.
- Use the question grid to keep track of the order of responses. Vary the order so speakers don't always speak in the same sequence and each has equal opportunities to reply first and last to questions.

- Be alert to timekeeper's signals. Allowing one candidate more time than another is a valid basis for criticism of the League's fairness policy.
- Audiences are quick to spot signs of partisanship. Avoid expressions of annoyance, agreement, or disagreement – keep a straight face no matter what is being said.
- Relax!

### **It's All Over!**

Go home, put your feet up and congratulate yourself for your great public service. When you are through giving yourself a well-deserved pat on the back, analyze the event: format, ground rules, question-and-answer period, the entire set-up of the forum and, of course, your own performance. Each forum is a learning experience so keep notes and comments for your next assignments.

Follow up with the forum's sponsor too, to discuss how they thought it went. You'll both probably learn a lot about how to make the next forum even better.

## **Share Your Skills**

Sign up for LWVM's Moderator Corps. The League office often gets calls from local Leagues and other organizations looking for the names of experienced moderators. LWVM has a Moderator Coordinator who maintains a list of moderators. If you are a

trained and experienced moderator and are ready for assignments, please contact the League office. There is always a need for good League moderators! It's a great service to Leagues, non-League sponsors and the community.

## Appendix A

### LWVM Guidelines for State and Local League Debates including “empty chair” debates

Candidate debates are regulated by federal and state election laws and regulations. In addition, important Internal Revenue Service (IRS) rules apply to debates sponsored by organizations designated as 501(c)(3) by the IRS. League-sponsored debates are governed still further by the League’s own nonpartisan policy. Although legal challenges are infrequent, debates are high-stakes campaign activities, and candidates who believe they have been hurt politically by a debate may challenge debate sponsors under these laws.<sup>1</sup>

*Note:* The following overview should not be construed as legal advice. Federal law applies for Massachusetts as there are no separate state laws that regulate candidate debates.

#### The League Framework

The League of Women Voters shall not support or oppose any political party or any candidate.

All Leagues bear the responsibility of safeguarding this nonpartisan policy and the organization’s nonpartisan reputation.

All local Leagues are designated 501(c)(4) by the IRS, and some local Leagues have a League education fund corporation or trust that is designated 501(c)(3). Leagues that use funds from their education fund accounts must abide by education fund rules. Whether acting as a 501(c)(3) education fund or as a 501(c)(4) membership organization, each League will want to sponsor and conduct debates in such a way as to avoid creating the impression that it favors one candidate over another.

#### The Regulatory Framework

Key elements of the regulatory framework include the following:

The **Federal Election Commission** (FEC) regulates the conduct of corporate, labor and nonprofit organizations – including both 501(c)(3) and 501(c)(4) or-

ganizations – in **federal** elections. FEC regulations define a debate as an event that

- includes at least two candidates;
- is staged in a way that does not promote or advance one candidate over another; and
- allows the candidates to appear concurrently, in face-to-face confrontations, with opportunities to respond to each other.

The **Federal Communications Commission** (FCC) regulates radio and television broadcasters and cablecasters. Under its regulations, a broadcaster that permits a candidate for any public office – **federal, state or local** – to use its facilities must provide all other legally qualified candidates for the same office with equal opportunities for use.

A broadcast debate must comply with the following FCC requirements.

- The decision to cover the debate must be based on a good faith judgment of its newsworthiness (and not on a desire to promote or disadvantage a particular candidate).
- The debate must not be edited and must be broadcast in its entirety, either live or reasonably soon after it takes place.
- The debate must include at least two candidates.

**Internal Revenue Service** (IRS) rules provide that 501(c)(3) organizations “may not participate or intervene, directly or indirectly, in any political campaign on behalf of or in opposition to any candidate for public office.” This prohibition applies to campaigns for public office at all levels – **federal, state and local**. A violation of IRS rules could jeopardize the tax-exempt status of the 501(c)(3) organization responsible.

A 501(c)(3) organization may sponsor nonpartisan voter education projects, such as debates, provided certain rules are followed. The guiding principle for such debates is that there be fair and impartial treatment of all candidates, with nothing that promotes or advances one candidate over another.

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<sup>1</sup> These guidelines amplify information provided in Chapter 2 of the LWVEF publication *Face to Face: A Guide to Candidate Debates* (pub #830).

## “Empty Chair” Debates

It sometimes happens that only one candidate in a contested election accepts a debate invitation or that a candidate cancels a debate appearance after agreeing to participate, leaving the debate with only one participant – often called an “empty chair” debate. If only one candidate accepts the invitation, the debate should be canceled. While cancellation is also the most prudent course of action when a candidate fails to appear at the event or backs out shortly before the debate, Leagues may need to consider whether and how to proceed should they find themselves in an empty chair debate situation.

There are no specific guidelines from the FEC or the IRS pertaining to the ability of nonprofit organizations to sponsor an empty chair debate. (FCC regulations would preclude any *broadcast coverage* of such an event.) Inasmuch as an empty chair debate, by giving one candidate a forum to talk to voters all by him/herself, bestows a real benefit on that candidate, there is a risk to any League that hosting such a debate would run afoul of FEC and/or IRS rules as well as the League’s nonpartisan policy.

As long as election for office is contested and at least two candidates participate, the debate can proceed as long as it is not televised.

The degree of risk and the options available to Leagues vary depending on the office being sought by the candidates and the IRS designation of the sponsoring organization.

- For debates involving candidates for **federal** office, FEC rules are particularly significant. To meet the FEC definition of a debate and thereby avoid being categorized as an illegal contribution to a federal candidate, the event must include at least two candidates. This rule applies to debates sponsored by both 501(c)(3) and 501(c)(4) organizations. **Any League that contemplates hosting an empty chair debate in connection with a federal election is strongly encouraged to seek formal guidance from the FEC.** FEC rules do allow educational institutions (e.g., a university) to sponsor “candidate appearances” that also involve members of the public. The rules are not clear as to whether co-sponsorship with an educational institution would give the League more latitude in dealing with an empty chair situation.

- For debates sponsored by **501(c)(3) organizations** for candidates for **state or local** office, IRS rules are critical. Although empty chair debates are not expressly prohibited by the IRS, the agency might well consider such an event to be an improper electioneering activity. Leagues can reduce that risk by observing the following guidelines:
  - The League board’s decision to sponsor a debate should include adoption of relevant policies and rules well in advance of the intended debate. See *Face to Face* for ideas. These should include provisions about empty chair debates.
  - League sponsorship of the debate, the issuance of invitations, and candidate responses should be announced via press releases.
  - An empty chair debate should not be conducted if all but one candidate decline the League’s offer to participate in a debate. It would be very risky for the League to sponsor the debate, knowing from the start that there will be only one participant.
  - An empty chair debate could be conducted only if one or more candidates pull out of a scheduled debate after agreeing to participate, and rescheduling is not feasible. (A League could also choose to cancel the debate in this situation.)
  - The closer to the scheduled debate that the candidate cancels his/her appearance, the stronger the arguments that going forward with the debate is not a partisan political activity.
  - If the candidate cancels well enough in advance of the debate to allow the sponsoring League to make other arrangements without charge or penalty, the League should make some effort to see if the debate can be rescheduled.
  - In announcing that a candidate has canceled his/her participation in a debate, the League should present the factual reasons given by the candidate, if any, without any editorial comment. If no reason is given by the candidate, the League should simply state that it was contacted by the candidate or his/her

campaign and told that the candidate would not be able to appear at the debate; the League can also state that the candidate provided no reason for canceling his/her participation.

- To maintain a clear record, the League should correspond **in writing** with candidates concerning invitations to appear at debates, attempts to accommodate each candidate's schedule, confirmation of scheduled debate appearances, confirmation of the cancellation of a debate appearance and attempts, if any, to reschedule a canceled appearance.
- In conducting any empty chair debate, the League should maintain, to the extent practicable, the debate format. The League must prevent the debate from turning into a candidate appearance that has the look, feel and content of a campaign rally for the only candidate attending the debate. The moderator

and other panelists, therefore, should ask nonpartisan questions, the length of the candidate's response should be limited, and if possible, the moderator and other panelists should act as devil's advocate, asking probing questions and follow-up questions.

- IRS rules are more liberal for debates sponsored by **501(c)(4) organizations**, but the League nonpartisanship policy still applies. A League acting as a 501(c)(4) membership organization could sponsor a **state or local** candidate event involving only one candidate. In considering such an option, the League would want to ensure that:
  - no tax deductible funds would be used for the event; and
  - the event would not damage the League's nonpartisan reputation by creating the impression that the League favored one candidate over another.

## Appendix B

### Sample Timed Agenda & Script For a Candidates' Forum Featuring Candidates in Two Races

- 7:30 **Sponsor's representative:** Opening remarks
- Explain purpose of meeting, League nonpartisanship, goals of forum: fair, respectful, informative, inclusive
  - Introduce cosponsors, if any
  - Make necessary announcements, including cell phone/pagers turned off
  - Introduce moderator
- 7:33 **Moderator:** Describe format and ground rules
- Explain criteria for inviting candidates
  - Review forum's program and timekeeping procedures
  - Outline rules governing question-and-answer period
  - Request written questions, if appropriate
  - Identify ushers, timers and question sorters
- 7:35 **Moderator:** Introduce candidates for School Committee
- Explain that all candidates were invited and name those who were unable or chose not to attend
  - Describe office, length of term, number of vacancies
  - Repeat that each candidate will have 3 minutes for an opening statement
- 7:36 **School Committee candidates – 3:** Opening statements, 3 minutes each
- 7:45 **Moderator:** Explain 25-minute question-and-answer period – 30-second questions, 2-minute responses, rebuttal or cross questions
- 8:09 **Moderator:** End Q&A's, repeat that each candidate will have 2 minutes for a closing statement
- 8:10 **School Committee candidates:** Closing statements, 2 minutes each, in reverse order
- 8:16 **Moderator:** Introduce candidates for Selectman
- Explain that all candidates were invited and name those who were unable or chose not to attend
  - Describe office, length of term, number of vacancies
  - Repeat that each candidate will have 3 minutes for an opening statement
- 8:17 **Selectman candidates – 3:** Opening statements, 3 minutes each
- 8:26 **Moderator:** Explain 25-minute question-and-answer period – 30-second questions, 2-minute responses, rebuttal or cross questions
- 8:50 **Moderator:** End Q&A's, repeat that each candidate will have 2 minutes for a closing statement
- 8:51 **Selectman candidates:** Closing statements, 2 minutes each, in reverse order
- 8:57 **Moderator or sponsor:** Close forum
- Thank the candidates, the audience, volunteers, news media for coverage
  - Remind all to vote: date of election, time polls open and close

**Appendix C**  
**Sample Question Grid**  
**Chart for Tracking Candidates and Speakers**

A grid like the one below provides a fair alternation of participants' opportunities to speak at a forum. Varying the order of candidates/speakers making statements and answering questions ensures that each speaker gets equal exposure and that no one is always first, last or in the middle.

This chart is for three speakers in any type of forum. It of course can be adapted for other formats.

<b>Speakers</b>	<b>Opening Statement</b>	<b>Question 1</b>	<b>Question 2</b>	<b>Question 3</b>	<b>Question 4</b>	<b>Closing Statement</b>
Anthony	Anthony	Stanton	Catt	Anthony	Stanton	Catt
Catt	Catt	Anthony	Anthony	Stanton	Catt	Stanton
Stanton	Stanton	Catt	Stanton	Catt	Anthony	Anthony



## **Appendix D**

### **What If?**

#### **How to Deal with Difficult Situations**

In the realm of nothing-new-under-the-sun, herewith many challenging situations you might have to deal with – and their solutions. After all, your responsibility is to ensure a fair, informative, respectful forum, so you'll need some tools to ensure that the forum runs smoothly.

#### **Audience is very small.**

Invite the audience to move to the front of the room so everyone feels part of the forum and it is less obvious that attendance is not all that was hoped. A small audience can have its advantages: it often leads to more informal yet in-depth discussions.

#### **Candidate keeps talking when time is up.**

Interrupt gently but firmly. "Excuse me, Mr. X, but you have used up your time. You may finish your sentence briefly." You can let people finish a sentence, but watch for paragraph-length sentences.

#### **Candidate gets obstreperous.**

Address the candidate directly, "Dr. Y, you are out of order," or "Ms. Z, I must remind you once again that you are not being fair to the other candidates." Your admonition may not work, but the candidate's true character is being revealed to the audience. When all else fails, bang the gavel.

#### **There's a question of dubious intent.**

If there is a question or comment of a personal nature by either a candidate/speaker or a member of the audience, rule it out of order. Explain calmly and firmly that, "We are here for an open, orderly exchange on the issues, not a discussion of personal characteristics." Then ask for another question.

#### **Voter forgets a burning question.**

From time to time, a questioner stands up and is too flustered to remember what the question was. Give her/him a moment to think and then gently ask, "What is your question?"

#### **Audience member makes a speech.**

Politely but firmly say, "Although your opinions are interesting, the audience would like to hear your

question so the candidates/speakers can answer. Please phrase your statement as a question." If that doesn't stop the flow, bang your gavel and ask for the next question.

#### **All questions are on the same subject.**

Say "There have been several questions on that subject already. Does anyone else have questions on other issues for the candidates/speakers?" This must be done tactfully so the audience will not feel that you are cutting off discussion of an issue of great interest to many.

#### **Hecklers in the audience become unruly.**

Remind the audience "This is not a rally for supporters but a nonpartisan forum for those who want to hear from the candidates/speakers. Please, let's give the candidates/speakers the opportunity to speak and not take up their time."

If it's obvious that supporters are the culprits, quietly ask the candidate to please call them off and point out that they are doing the campaign no favors.

#### **Grandstanders are monopolizing the forum.**

Limit questions from the audience to one from each person if there is a large audience or a few people are asking all the questions. You can address the questioner directly, "Please sit down and wait your turn. There are others in the audience who are waiting their turn." Or "Until all have had a chance to ask a question, I will limit questions to one per person." The audience won't resent your sincere and low-key effort to keep the meeting fair and on time.

#### **Candidate or audience member challenges the way you are conducting the forum.**

Calmly restate the ground rules. Point out that the candidates/speakers received the ground rules and format in advance and agreed to them. If the challenge continues you may have to call a recess and caucus with the candidates/speakers and sponsors. This is a rare occurrence and another reason for strict adherence to the format and ground rules.

Some moderators are given discretion to make changes in the format after the forum has begun. These usually involve adjusting time allowances for audience questions when interest runs high. Before you change the ground rules, call a brief recess and check with the sponsor and candidates/speakers. If they all agree to a change, tell the audience and proceed.

**Campaign worker is taking photos during the forum.**

If cameras, videorecorders or other recording or electronic devices are distracting the audience or the speakers, ask that the activity be stopped.

**Running out of questions.**

You could make some minor changes in the format, such as letting the candidates/speakers make longer closing statements or elaborate on an earlier answer. But before making any changes, call a brief recess and check with the sponsors and speakers. If all agree to a change, tell the audience and proceed, but stick to the ground rules.

You can also simply adjourn. Sometimes the audience is small or the race or issues lack much controversy. Be very sure there *aren't* any more questions, then move along to closing statements and send the audience home early.

**Time is fleeting.**

The forum is being cablecast, time is running out and you must move on to closing statements, but it's obvious the audience has more questions. Ask the candidates/speakers if they could stay and answer more questions after the forum.

**Campaign worker or dedicated follower of a candidate complains after the forum.**

If someone complains that a particular candidate didn't do well and that you should have helped answer the questions, explain calmly that the moderator's role is to be sure that the candidates hear the questions, but it is never appropriate to put words in a candidate's mouth. (Remember, a candidate's not being able to answer questions can be informative to voters as well.) Be equally cautious in helping panelists in an issues forum. Repeat questions, but don't risk the appearance of bias.

**People demand to take the written questions with them afterwards.**

Allow them to look at the questions after the forum to satisfy themselves that legitimate questions have not been censored, but the questions belong to the sponsoring organization and should not be given away to anyone. The sponsor should keep the questions for some time in case a problem should arise after the forum.

# *Massachusetts Voters' Bill of Rights*

**Your voting rights are protected. These rights are guaranteed to qualified registered voters.**

1. **You have the right** to vote if you are a qualified registered voter.
2. **You have the right** to cast your ballot in a manner that ensures privacy. You have the right to vote without any person trying to influence your vote and to vote in a booth that prevents others from watching you mark your ballot.
3. **You have the right** to remain in the voting booth for five minutes if there are other voters waiting and for ten minutes if there are no other voters waiting.
4. **You have the right** to receive up to two replacement ballots if you make a mistake and spoil your ballot.
5. **You have the right** to request assistance when voting from a poll worker or anyone of your choice, except your employer or an officer of your union or their representatives.
6. **You have the right** to vote if you are disabled. The polling place must be accessible, and there must be an accessible voting booth.
7. **You have the right** to vote if you cannot read or write or cannot read or write English.
8. **You have the right** to vote but must show identification if: you are a first-time voter who registered to vote by mail and did not submit identification with the voter registration form; or your name is on the inactive voter list; or your vote is being challenged; or if requested by a poll worker. Acceptable forms of identification are: Massachusetts driver's license, other printed documentation containing your name and address such as a recent utility bill, rent receipt on landlord's letterhead, lease, or a copy of a voter registration acknowledgement or receipt.
9. **You have the right** to vote by absentee ballot if: you will be absent from your city or town on Election Day; or if you have a physical disability that prevents your voting at the polling place; or if you cannot vote at the polls due to religious belief.
10. **You have the right** to cast a provisional ballot if you believe you are a qualified voter but a poll worker tells you that you are ineligible to vote.
11. **You have the right** to follow up any challenge to your right to vote through the complaint process.
12. **You have the right** to vote if you are not currently incarcerated for a felony conviction and have registered as a voter after your release.
13. **You have the right** to take this Voters' Bill of Rights or any other papers, including a sample ballot, voter guide or campaign material into the voting booth with you. Please remember to remove all papers when you leave the booth.
14. **You have the right** to vote at your polling place any time between 7 am and 8 pm for state and federal elections—hours may vary for local elections. If you are in line at your polling place when the polls close at 8 pm, you have the right to vote.
15. **You have the right** to bring your children into the voting booth with you.

If you feel that your right to vote has been violated in any way, call the Secretary of the Commonwealth's Elections Division at 1-800-462-VOTE (8683). This call is free within Massachusetts.

[Signed]

**Mitt Romney**  
Governor of the Commonwealth  
of Massachusetts

**William F. Galvin**  
Secretary of the Commonwealth  
of Massachusetts

**Madhu Sridhar**  
President  
League of Women Voters  
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**League of Women Voters of Massachusetts  
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