

## **The Who, What, Where, When and Why of Planning an LWV Education Forum (101)**

Every education forum is unique. It is conceived, planned and offered from the perspective of the organization hosting the forum and has an intended and specific audience. Yet, all forums share similar design elements, which are discussed in the following paragraphs. Before that, one basic rule applies for a LWV education forum – its purpose is to inform, not persuade. Various points of view are welcome, so long as the discussion is balanced. (Otherwise, you’ve created an advocacy forum.) That’s it. Here goes.

### **Design questions:**

1. **Why are you holding an education forum?** *This is key, because it influences every other design question and how your team collectively thinks about the program.* Is it to inform your members only? (Perhaps, but could it be more?) Is it for League visibility with the hopes of finding new members from the community? Is it to engage your local businesses, and how would that work? Is it to engage less active members who also are potential leaders? Is this forum something that state League (LWVMA) would be interested in co-sponsoring? How many people do you want to attract? (Set a target size audience.)
2. **What is the topic or theme?** Is this an important topic for your local community or a broader audience? Does it flow from a local program initiative, or state/ national program? Do you want to unsettle your audience and make them really think? What about your speakers and/or moderator? Tie this back to your *why?* Answers.
3. **Who is the audience?** What is their level of knowledge on the topic? Is this program focused for adults, parents and/or for voting age teens? This will have an influence on the speakers you select and the amount of information you may have to provide to the intended audience to set-the-stage at the beginning of the forum or prior to the forum (through handouts, movie nights, articles in local papers/websites, etc.). Tie it back to your *why?* answers.
4. **When will this forum be held?** Much to consider here. After sifting through local events and holidays, think about speaker availability. Flexibility is key – the more known the speaker, the tighter her/his schedule may be. Be prepared to offer several days to key speakers.
5. **Where will this forum be held?** If you are thinking BIG, plan far in advance. Depending on venues, you may have to reserve 6-10 months in advance. You may want to put a ‘hold’ on several days, until you have secured your key speaker(s).

### **Planning:**

1. **Talking Points:** Assuming you have already received preliminary approval from your local Board to proceed with the education forum, you need to have one or two conversation starters to use when approaching your moderator, potential speakers or the LWVMA Board for co-sponsorship. Getting buy-in with your internal moderator or with an external professional moderator is critical. You may want to explore her/his ideas in framing the forum, in which case an outline (see [Attachment 1](#)) may be useful as a starting point for that discussion.

After fleshing out more details, create your first overview of the forum (don’t worry, it will be updated over time) that can be distributed to potential or selected speakers as well as to your moderator (see [Attachment 2](#)). This outline also can be used when approaching your local Board for final approval.

For a request to the LWVMA Board for co-sponsorship / coalition action, five items must be addressed, as follow: purpose, roll-out, structure, timeframe and suggested location(s). Attachment 3 provides an example of the details required when submitting a request.

2. **Budget:** Most probably your local Board will give you approval for planning an education forum before knowing the full extent of your budgetary needs. Attachment 4 provides an outline of most items to include in your budget request. You may not have a need for all services or items listed, or you could have other expected or a column for unanticipated expenditures.
3. **Publicity:** The key to getting the turnout you want for your education forum is all about your publicity campaign. A general timeline and checklist for an effective campaign are presented in Attachment 5. Please note that sample documents are available at “Follow the Money LWVCC-Pushing Back Forum” at <https://sites.google.com/site/presidentslwvma/file-cabinet>
4. **A/V details:** Depending on the location of your forum and the needs of your speakers, you may require audio support. And, if you plan to film the forum, you may need video support. If you are filming the event, you must have permission from the speakers. This is typically handled with a ‘release form’ that your local community cable station commonly uses. Be prepared for questions that speakers may raise in granting their permission. Legal advice may be required.
5. **Donations:** This is a great way to garner community support for your forum. You may ask for food or printing contributions or ask a local bookstore to participate. And, don’t forget to acknowledge their contributions in your program, on your website, and at refreshment tables.
6. **Logistics:** Ok, one last thing – making all of this happen. You will need to develop your ‘To-Do’ list very early and start recruiting your team. Depending on the size of your event, you may need a handful of helpers or teams of people working on specific tasks. Attachment 6 presents a general outline of things to consider when planning your forum. As time flies by and you’ve organized your team, the outline will expand and you’ll have 3 or more iterations.

For the forum, you will want to provide the moderator, every speaker and team leaders with a copy of the logistics and timing (Attachment 7). Knowing how you want everything to go is fine, but everyone else must be aware too. Be ready for last minute changes and expect an OOPS! to occur. And, don’t forget the pictures.

Good luck!

List of topics to discuss - Interview with Tom Ashbrook @ WBUR

THEME: (title - TBD)

- Campaign finance has become a major issue during this election season. This program will focus on the new landscape for the 2012 elections with our speakers discussing their ideas and perspectives and whether we, the voters, need to take action. If so, what kind of action?

FORMAT: Conversation style (90 minutes)

- Introduction to the evening - (LWVCC: 5 minutes)
- Background: *Education* - set the stage (15 minutes)
  - provide an understanding of what has happened in the legal arena (1907, '47, '74 > 2002
  - describe changes in amount of money spent in '06, '08, '10 elections and primary elections for '12
  - When did politicians start spending 30-70% of their time soliciting contributions?
  - How does this affect you?
- Speaker conversation: *Advocacy* (45-60 minutes including Q&A)
  - Is the current situation fine or should we change it?
  - What options or remedies are available to change the current situation?
- Wrap-up of discussion (5 minutes)
- Wrap-up of evening )LWVCC - 5 minutes)
- *Questions*: how to handle both topics?
  - Does Tom Ashbrook set the stage in providing background/education component?
  - Separate speaker?
  - Intertwine background with discussion?

SPEAKERS (possibilities on reverse side)

LOGISTICS

Time: auditorium and cafeteria are available from 6pm-10pm

Sponsors:

- Ask the LWVMA to co-sponsor (in name only, not \$\$)
- Does the diversity in sponsorship help to attract speakers?

A/V

- Advise on videotaping and rights?
- Review copyrights contract with CCTV

PR

- Does WBUR or On Point become involved in this type of event?

Post-Discussion gathering (coffee & cookies in the cafeteria = 3C)

- Reinforce learning and further involve/engage audience
- Would Tom Ashbrook & speakers attend to chat?

## Panel Discussion on Campaign Finance Reform

Campaign finance has become a major issue during this election season. This program focuses on the new, election landscape for the 2012 elections since the *Citizens United* decision. Our speakers will discuss their ideas and perspectives and whether we, the voters, need to take action. If so, what kind of action?

[The title for this event is "[Pushing Back on Money Politics, 2012.](#)"]

Date: May 17, 2012

Time: 7:30-9:30 (+)

Location: Concord-Carlisle High School, Auditorium

Introduction: 10 minutes

- The local League (Co-Presidents) will explain the logistics for the evening, safety requirements for the building, the mission of the League and introduce Eva Valentine, State League President
- State League (Eva Valentine, President) will address the national advocacy position on campaign finance reform, comment briefly on state initiatives and introduce Tom Ashbrook

Part 1: 20 minutes

Tom Ashbrook will introduce this session as an education segment that provides a brief background as to how we got to where we are regarding money in politics.

- Professor Lawrence Lessig will deliver this segment using a multi-media slide show (similar to a portion of his presentation available at the On Point website from his interview with Tom Ashbrook)

Part 2: 60 minutes

This session will be a moderated discussion that examines a variety of alternatives or remedies proposed by or discussed with panel members. Remedies may include tightened disclosure laws/regulations, public financing of elections, an amendment to the constitution that rescinds/restricts free speech rights of corporations as they pertain to campaign finance and elections, and more. This portion of the session will be moderated by Tom Ashbrook who will remain neutral (no advocacy on his part) and will tease out the nuances, issues, pros and cons of the perspectives offered. At this time panel members include:

- Lawrence Lessig - Director of the Edmond J. Safra Foundation Center for Ethics at Harvard University and Professor of Law at Harvard Law School (<http://www.lessig.org/info/bio/>)
- Jeff Clements - attorney and author (<http://corporationsarenotpeople.com/author/jeffclements/>)
- Mimi Marziani - counsel for the Democracy Program at the Brennan Center for Justice ([http://www.brennancenter.org/people/marziani\\_mimi/](http://www.brennancenter.org/people/marziani_mimi/))
- 4<sup>th</sup> member - TBD (trying for Amy Walter, political director, ABC News)

## Planning an Education Forum – ATTACHMENT 2

Part 3: ~25 minutes

This segment will be audience questions to the panel members, moderated by Tom Ashbrook. [Microphones (4) will be set up in the auditorium for questions - no call-in or Twitter questions will be accepted.]

Closure: (5 minutes)

- Thank speakers, moderator, audience
- Ask for donations to defray the costs of this free program
- Invite audience to the cafeteria for informal discussion and refreshments

Part 4: ~ 30 minutes (cafeteria)- refreshments served

- In an effort to reinforce the learning, we are planning a post-program session opportunity for members of the audience to discuss informally the information they heard and begin to formulate their next actions.
- All speakers and the moderator will be invited to attend.
- Available on tables: co-sponsor (LWVCC, LWVMA, WBUR) materials, sign-up sheets and information for FT\$ Committee, LWVCC membership, speaker resources (books/materials)

## Pushing Back on Money Politics, UPDATE

Since the “Pushing Back on Money Politics, 2012” forum held in Concord on May 17<sup>th</sup> at which approximately 500 people - LWV and regional community members - came, Lawrence Lessig responded favorably to another speaking engagement in Concord held on September 16<sup>th</sup>. In addition, his nonpartisan organization, Rootstrikers ([www.rootstrikers.org](http://www.rootstrikers.org))\*, is interested in collaborating with the state League (LWVMA) on speaker or panel programs that would be offered through local Leagues in various locations across the state.

The following structure is based on preliminary discussions with Rootstrikers’ campaign manager, Szelenia Gray, and Boston coordinator, Daniel Wong:

- Purpose: to educate and engage more citizens across the state of Massachusetts on the need for reforming campaign financing and addressing the undue influence of money in politics.
- Roll-out: local Leagues would be responsible for venue, publicity (w/Rootstrikers support) and delivery.
- Structure: this could be a simple speaker series and/or a forum series with panelists, similar to the one held in Concord. (Concord-Carlisle has information to help with this part.)
- Timeframe: January – May 2013
- Suggested Locations: Newton/Needham, Lexington, Worcester area (perhaps at Worcester Polytech?), Amherst, Williamstown, North Shore and the Cape. [Note: College venues have added appeal for Rootstrikers who leans towards recruiting young(er) volunteers.]

A review of the LWVMA Policy for Participating in Coalitions (<http://www.lwvma.org/LWVMA%20coalitions%20policy%20final.pdf>) indicates that the criteria for joining such a coalition would be satisfied and that the form of coalition most probably would be a temporary alliance or sponsorship.

Submitted by: 09/17/2012

Planning an Education Forum – ATTACHMENT 4

BUDGET

(anticipated audience = \_)

PRINTING

- Programs (\_ double-sided sheets)
- Flyers (\_ double-sided sheets, color) [Bulletin, community sites]
- Resource materials (\_ double-sided) [table in cafeteria]
- Sign-up sheets (\_)
- Solicitation letters (\_)
- League sticky name labels (\_)

REFRESHMENTS (\*)

- Paper goods (pool extra napkins/plates/cups that League members have)
- Relying on donations from area shops for food, beverages, paper goods\*

FACILITIES

- Room(s) rental
- Custodial fee
- Insurance rider

SPEAKERS

- Honorarium
- Gifts
- Travel (airfare, mileage, etc.)
- Hotel / member home-stay
- Light supper or refreshments / meeting before

A/V

- Cameras
- Audio
- Mixers
- Screen

TOTAL =

**Publicity**  
**A General Timeline and Checklist\***

- \_\_\_ Prepare and distribute press release announcing the program.
  - When a local League is co-sponsoring with LWVMA, prepare two versions, one of which is suitable for statewide distribution.
  - Though a brief, save-the-date press release may be issued well before the program, an ideal time to issue a press release with all relevant information is three to four weeks before the event.
  - Email other local Leagues; ask them to include your event in their bulletins, newsletters and websites.
  
- \_\_\_ Spread the word through event listing websites.
  - Post on sites like boston.com and local Patch.com sites, as well as on LWV sites.
  - Word limits may require a condensed event description.
  
- \_\_\_ Invite guests, including elected officials.
  - Personalize invitation letters and send by mail and email.
  - Follow up with a call to maximize attendance.
  
- \_\_\_ Distribute and post a flyer for the event.
  - Use flyer in email outreach.
  - Link to flyer on League websites.
  - Post flyers on community announcement boards in high-traffic areas.
  
- \_\_\_ Create a Facebook event to spread the word more easily through social media.
  
- \_\_\_ Print and laminate large signs/posters for use on sandwich board signs.
  - Use large, readable print and, if possible, color; include logos of LWV and other sponsors.
  - Include essential details about topic, speakers, date/time and location.
  - Secure permissions for placing sandwich boards.
  - Display boards in high-visibility locations for one to two weeks before the event.
  
- \_\_\_ Encourage press coverage with a media advisory a few days before the event.
  - Follow up by email or phone; offer to answer any questions.
  - To ensure that reporters have the basic facts, prepare a press packet with information about the event, sponsors, speakers and topic, and distribute the packets to reporters as they arrive.
  
- \_\_\_ Distribute a program to event attendees.
  - Set forth the plan for the event, including whether there will be a Q&A session, and the speakers' biographical information.
  - Thank donors and volunteers.
  - Include information about LWV, its mission and an invitation to join.
  
- \_\_\_ Send a letter to the editor of the local paper for publication immediately after the program.
  - Tout the program, the speakers and the size of the audience.
  - If the program was recorded for TV or viewing on the Internet, provide information on how to access the program.
  - Thank speakers, venue, funders/supporters, audience and volunteers.

*\*For sample documents from May 2012, visit "Follow the Money LWVCC-Pushing Back Forum" at <https://sites.google.com/site/presidentslwvma/file-cabinet> (Feb2013)*

## TO-DO List - general outline

### PR

- Articles for papers
- LLU for State League
- Co-sponsor
- Flyers, etc.
  - Distribute to churches, TM, Local Leagues
  - External media
  - Internal media - MMN, Bulletin
- Town-wide mailing
- Invitations to officials

### A/V arrangements

Solicitations (involve as much of the community as possible)

- Drinks (coffee, Welch's, Snapple?)
- Food (cookies, munchkins)

### Speakers

- Program arrangements
- Dinner/host arrangements

### Event Logistics

- Program Handout
  - Design
  - Printing
- Ushers
  - Aisles
  - Programs
  - Cafeteria
- Refreshments
  - Set-up
  - Paper goods
  - Coordinate with donors
- Table (lobby) set-up
  - LWVCC recruitment materials
  - Bookshop ?
  - FTM materials
  - Printing of materials
- A/V
  - Camera people (3 plus backups)
  - WBUR
  - Audio
  - Editor/mixer
- LWVCC people
  - Donations
  - Recruitment

## "Pushing Back on Money Politics, 2012" Logistics and timing

### 7:28pm - enter from Orchestra Room to front row seats

- PODIUM side - Paula Vandever, Cindy Nock, Eva Valentine, Tom Ashbrook and Lawrence Lessig
- Near side - Nancy Beeuwkes, Mimi Marziani, Jeff Clements and Dee Ortner

### 7:30pm - 7:40pm PODIUM

- Paula & Cindy *open the evening and return to seats*
  - general statement about the forum,
  - safety requirements & cell phone usage (not),
  - non-partisan nature of the LWV, and
  - introduce Eva Valentine
- Eva Valentine - *comes to PODIUM and returns to seat after remarks*
  - League's work on advocating for campaign finance reform at the national and state levels
  - introduces Tom Ashbrook (bio attached).
- Tom Ashbrook (TA) - *comes to PODIUM and returns to seat after remarks*
  - Welcomes audience + WBUR's co-sponsoring of this event
  - Describes 3 parts of evening
    - 1. Fast-paced Presentation: back story on money in politics by LLessig (LL)
    - 2. Panel discussion: approaches and remedies for 'fixing this mess'
    - 3. Audience questions: your turn
  - Introduces L Lessig (bio attached)

### 7:40pm - 8:00pm PODIUM

- Lawrence Lessig - *comes to PODIUM and remains there*
  - Gives presentation
  - Nods to Tom Ashbrook at conclusion slide
- Tom Ashbrook comes to PODIUM
  - Thanks LL and asks him to take a seat at the table
  - *Dee Ortner walks to back stage, presses button to raise screen and returns to seat*
- LLessig moves to table seat (leaves computer on podium)

### 8:00pm - 9:00pm TABLE - CENTER STAGE

- Tom Ashbrook - *introduces speakers while standing at the PODIUM (lavalier attached before)*
  - Introduces Mimi Marziani (bio attached) - *who walks onto stage and takes her seat*
  - Introduces Jeff Clements (bio attached) - *who walks onto stage and takes his seat*
- Tom Ashbrook - *walks over to table, sits down and begins discussion*
  - Opening remarks on remedies by each speaker (5 minutes max / speaker)
    - Mimi Marziani - tightening disclosure laws/regulations, public financing of elections
    - Lawrence Lessig - constitutional convention, public financing
    - Jeff Clements - constitutional amendment (*affirming that free speech rights belong to natural persons, not corporations or other non-person entities*) first *plus* include concurrent approaches
  - Interactive discussion/debate on merits & feasibility of each approach

9:00pm - 9:30pm AUDIENCE QUESTIONS

- Tom Ashbrook - fields questions and directs to speakers for responses

Forum Closure: PODIUM

- Paula & Cindy - *come to PODIUM*
  - Thank speakers, moderator, audience
  - Ask for donations to defray the costs of this free program
  - Invite audience to the cafeteria for informal discussion and refreshments
- *Speakers, moderator and League co-presidents leave stage and return to Orchestra Room*
- *Eva Valentine, Nancy Beeuwkes & Dee Ortner return to Orchestra Room*
- Co-presidents give gifts to moderator and speakers

9:30pm - 10:30pm CAFETERIA

- All speakers and the moderator are invited to attend
- Available on tables:
  - co-sponsor materials, sign-up sheets and information for FT\$ Committee, LWVCC membership, voter services info
  - The Concord Bookshop - book sales/signing
- Refreshments
  - Signs for donors
  - Beverage table
  - Food tables: bread, cheese, jams; cookies + gluten-free

CLEAN-UP

- Dee drives Mimi Marziani to Hotel 140 in Boston
- Food - goes to Beeuwkes' house
- Cones removed from parking area
- Supplies, tables, clothes, etc. returned to Erica Morrison, Debbie Barr & Nancy Beeuwkes
- Contributions go home with Anita Barker
- LWVCC materials go home with Barbara Lewis



Tom Ashbrook

Lori Gill Pazaris



Ashbrook, Clements, Marziani, Lessig

LGP



Audience

Kathleen Elcox



Post-forum community gathering with speakers

KE