



## **Guidelines/Best Practices for Hosting a League Forum**

### **Planning your forum**

*Determine the primary goal for your forum.* League forums can be held to advocate for a specific position, or they can be held to educate the public about an issue. Information provided at every forum should be objective and evidence-based. Since we keep our voter education activities separate from our advocacy, a forum cannot do both. Voter education forums should present all sides of an issue and not discuss the League position. Advocacy forums present the League's position on an issue and do not have to present all sides. Note: If your educational forum is funded by the LWVMA Citizen Education Fund's Scharfman grant program, the IRS and LWVUS criteria for use of tax deductible 501(c)(3) funds must be carefully followed (see reference on Scharfman Guidelines).

*Determine the scope of the forum topic.* Is the issue around which you are creating the forum of local, state, or national interest (or any combination of these)? Be as specific as possible. This will help you determine your audience and speakers. For example, if you want to cover affordable housing, you will most likely want to focus on your own community. You should also ask who is most affected by the forum topic, and ensure those viewpoints will be represented by the speakers and the audience. Some stakeholders may be outside of your community (see reference on power and equity.)

*Think about your audience and their takeaways from the forum.* Do you want to inspire them to think more deeply about an issue by understanding differing viewpoints? Do you want them to be motivated to take action on something? If you want the audience motivated to take action, provide clear takeaways or action steps as part of the forum.

*Take advantage of League resources for your topic.* Learn as much as you can about the League position on the issue (if any) as well as existing advocacy by the League on the issue. We strongly encourage you to seek input from the relevant LWVMA legislative specialist as they have subject matter expertise as well as deep and broad contacts to offer. This will help you refine your forum approach and help you determine the speakers you want to invite. For example: Impact on Issues, Where We Stand, LWVMA Legislative Action Committee, and advocacy priorities. (See reference guides below for permissible advocacy for 501(c)(3) and 501(c)(4) organizations.)

*Collaborating with coalition members or community partners.* Be sure to include them during the planning process. Ask about their thoughts for event outcome. Be sure you know if they have taken a stand on the issue, especially for an educational forum. (See Guidance for local League collaborations.)

### **Finding speakers or panelists**

Your forum will be most effective if you invite speakers with specific expertise, credentials, and credibility on the topic, and who will provide evidence-based information for their arguments that are backed up by statistics and independent, nonpartisan research. For a local issue, seek competent local experts. For an

educational forum, be sure you have speakers from all sides. Some suggestions for determining if a speaker meets these criteria:

*Conduct an online search for experts on the forum issue.* Check YouTube, TED talks, professional organizations, and local colleges and universities. If you have someone in mind, this is also a good way to check their bona fides.

*Determine if your chosen speaker(s) has an affiliation with an advocacy group.* If so, research that group to understand its positions and advocacy approach. For example, some groups have an approach to advocacy that is disruptive and not in line with League values. You may not want them represented at your forum. LWVMA legislative specialists could be a good resource for questions in this area.

*Ask potential speakers to provide resources they use to advocate for the issue.* Are the resource articles peer-reviewed and backed by non-partisan statistics? Encourage them to provide a resource/reading list with citations for forum attendees.

*Check out the person's speaking style.* It's important to have speakers and panelists who are engaging and communicate effectively. Have they spoken at other forums? If yes, seek videos or audios of the presentations for review. Have they been well-received in public forums? If you're uncertain, request references from organizers of recent engagements where the person spoke.

**Note:** It's possible that no one can meet speaker standards, or even want to speak on an issue, especially if it's a controversial one. If this is the case, you may want to reevaluate the purpose of the forum.

### **Choosing a moderator**

*We strongly encourage use of a League-trained moderator for all League forums.* If the forum is to educate about a controversial local topic, a seasoned League moderator is crucial. We highly recommend that the moderator is selected from another town to ensure there is not an appearance of a conflict of interest.

*Include your chosen moderator in the event planning.* This helps them to envision the shape of the event and expected areas of disagreement.

*Vet probable questions with the moderator.* They will want to prepare for potential issues that may arise, such as asking speakers to back up assertions made without data, addressing misstatements of facts, and so on.

### **Generating your forum's questions**

*Preparing unbiased questions.* Your League planners should prepare several questions that are the centerpiece of your forum and determine its direction. Biased or leading questions imply a preferred viewpoint and must be avoided. Such questions often contain extra information that makes them slanted towards a particular answer. For examples, see the reference on unbiased questions. Some Leagues write "seed" questions that can be used if audience questions are slow to come forward. These should be as carefully crafted as your lead questions for speakers.

*Handling audience questions.* We suggest that questions from the forum audience be submitted in writing. This avoids passing a microphone and attendees taking up valuable time. Your League can provide notecards to attendees. League members or other helpers collect the cards and pass them to several

designated League “sorters” who review the questions for appropriateness. Questions that seem biased, leading, confrontational, or directed to only one speaker are weeded out. Sorters sometimes rewrite or combine questions on a similar topic. Vetted questions from the League sorters are passed to the moderator. After the event, the notecards with questions are collected by the League and destroyed, never shared. Question sorters should review the reference on unbiased questions.

## **References**

*League positions*

[Impact on Issues \(LWVUS\)](#)

[Where We Stand \(LWVMA\)](#)

*Guidance for League forums, Citizen Information, Voter Service*

[Voters Service and Citizens Information \(LWVUS\)](#)

*Guidance for educational forums*

[The Who, What, Where, When and Why of Planning an LWV Education Forum \(101\) \(LWVMA\)](#)

[Guidelines for local Leagues on ballot questions](#)

*Guidance for advocacy*

[LWVMA Policy on Advocacy](#)

[Exercising Our Power: Permissible Advocacy for 501\(c\)\(3\)s and 501\(c\)\(4\)s](#)

*Guidance for local League collaborations*

[Guidance for Local League Collaborations with Other Organizations](#)

*Guidance for writing unbiased questions*

[New Guide: Are your Voters' Guide Questions as Unbiased as you Think?](#)

*Scharfman grants for voter education*

[Lotte E. Scharfman Citizen Education Grant Program](#)

*Guidance on power and equity*

[Integrating Power and Equity](#)