

# VOTER EDUCATION TOOLKIT

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Guidelines for Candidate Forums  
and Voter Guides

2015



LEAGUE OF WOMEN VOTERS®  
OF GREATER CLEVELAND

50 Public Square #938  
Cleveland OH 44113

[lwvgreatercleveland.org](http://lwvgreatercleveland.org)

# VOTER EDUCATION TOOLKIT

## Guidelines for Candidate Forums and Voter Guides

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## **INTRODUCTION**

The League of Women Voters was formed in 1920 with an urgent mission in mind – to educate the thousands of newly enfranchised women who were finally eligible to vote in local, state, and federal elections. In the 95 years since, the League’s mission has expanded dramatically. Now its members (men as well as women) seek to provide voter education for all. Many organizations have such a mission, but few have as honored a reputation as the League does for providing nonpartisan, unbiased presentations and materials. This toolkit has been developed by a cadre of seasoned League voter service providers to give every League member the background and confidence needed to produce effective candidate forums and voter guides.

---Penny Jeffrey, Voter Service Chairperson  
League of Women Voters of Greater Cleveland (LWVGC)

### **CONTRIBUTORS:**

Maryann Barnes, Cleveland Heights-University Heights Chapter  
Conda Boyd, Bay Village Chapter  
Nancy Calcott, Rocky River Chapter  
Carol Gibson, Cleveland Heights-University Heights Chapter  
Fern Jennings, Cleveland Heights-University Heights Chapter  
Kathy Kosierek, Lakewood Chapter  
Janice Patterson, Westlake-North Olmsted Chapter  
Nikki Salupo, Fairview Park Chapter  
Meryl Simon, Shaker Heights Chapter

### **NONPARTISANSHIP POLICY**

The League of Women Voters, a nonpartisan political organization, encourages informed and active participation in government. Neither the League nor the LWV Education Fund supports or opposes any political party or candidate.

# 1. FIRST THINGS FIRST

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Here is a basic list of what needs to be discussed and decided once someone has the idea that we should do a candidate forum. On the pages that follow in this section, you will find a host of ideas about each bulleted item to help you make the best plan possible. (Most of these items also apply to producing a voter guide; additional suggestions for voter guides are contained in 3. Voter Guide Specifics.)

- ✓ Volunteers
- ✓ Partnerships
- ✓ Place and time
- ✓ Rules and schedule
- ✓ Publicity

## **VOLUNTEERS**

Here's who you will need to recruit for the event:

- Timers –2
- Question screeners – 2 or 3 (could use more to work in shifts)
- Literature table – 1
- Candidate sign-in table – 1
- Room ushers-runners (passing out cards and pencils for questions) – 2 or 3
- Hall ushers (directing patrons and candidates) – 1 to 3, depending on building
- Moderator – 1 or 2 (could work in shifts, depending on agenda)

Where will you get the volunteers?

- Chapter members (especially new members and seldom-seen members)
- Partner organizations (PTA? Kiwanis? Rotary?)
- High school students
- Scout troops

## **PARTNERSHIPS**

Ideally, the League should take the lead in partnering with another entity. It is important to include representatives from the partner in the early planning stages so that the workload can be shared to a great extent. The League should take the lead in communicating with the candidates. The League and the partner should work together to establish the ground rules for candidates and for the event itself. Other organizations or individuals might be contacted to provide in-kind or financial support for the forum or voter guide. Decide whether these are partnerships or sponsorships and publicize them accordingly.

Chapters need to consider the entire LWVGC as a partner, which means consulting early (and often) with LWVGC voter service and outreach chairpersons. You'll want to avoid scheduling conflicts with other League events and you'll need to know the latest information from the Ohio secretary of state and the Cuyahoga County board of elections. And, you may be able to obtain stationery, labels, envelopes, banners, signs, stop watches, timer signs, and other useful items to use or borrow from LWVGC as well.

## FORUM SCHEDULING: DATE AND TIME

- Check election date and early voting schedule [boe.cuyahogacounty.us](http://boe.cuyahogacounty.us)  
learn when the list of candidates will be final  
check filing date schedule for each type of candidate [boe.cuyahogacounty.us](http://boe.cuyahogacounty.us)  
remember to check for write-in candidates too
- Set date(s) early (June or July)  
Review – and avoid – other organizations' meeting dates (e.g., city council, board of education, civic groups)  
tell the candidates the date (don't give them a choice!)
- Set time of day so as to attract an audience  
Saturday afternoons are good for seniors  
the number of candidates to be heard may dictate start time

NOTE: Remember to verify the dates for all of the elections that will occur in a given year in your community. Although you may not conduct candidate forums each time, there may be ballot issues to be considered. And your chapter might wish to develop an annual publicity plan that encourages citizens to be registered, to request absentee ballots, and to go to the polls for elections taking place throughout the year.

## FORUM SCHEDULING: PLACE

- Check out facilities that seem to be the best public sites in your community

### FACILITY CHECKLIST

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

- Reserve the venue  
reserve the maximum number of dates; cancel unneeded ones as soon as you can  
understand building opening, closing rules  
determine costs for using the venue, if any  
provide evidence of liability insurance, if required

## **OTHER SCHEDULING CONSIDERATIONS**

### **Liability insurance**

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

### **Security**

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

## **BUDGET**

Forums are not only labor-intensive; they may require quite a lot of money to produce. Some chapters will have funds reserved especially for this purpose; others will have to be creative about keeping costs down. In both cases, it makes sense to seek in-kind or cash contributions to support the event. Such contributions will be made to the Education Fund of the LWV of Greater Cleveland and are tax-deductible for the donor. Chapters may be able to apply to the LWVGC board for supplemental funding.

Note: League educational activities may be funded with either operating funds or tax-deductible monies. When tax-deductible monies are used, there are Internal Revenue Service regulations that must be followed. If an election event is broadcast, even on a community access station, there are other federal regulations that must be applied. And the League has guidelines about the way membership recruitment must be handled at educational programs. Since these rules change from time to time, planners of candidate and issue forums and voter guides should consult with the current voter service chairperson of the LWVGC board for specifics.

Here is a list of expenses that might need to be covered:

- ✓ Postage for candidate mailings
- ✓ Site rental & custodian fee
- ✓ Sound-system rental & delivery
- ✓ Liability insurance
- ✓ Videotaping services
- ✓ Printing (programs, table signs, etc.)
- ✓ Stopwatch & timer cards
- ✓ Disposable cups & pitchers of water or bottled water (for candidates)
- ✓ Index cards & pencils
- ✓ League banner
- ✓ Directional signage for the building
- ✓ Advance publicity (fliers, newspaper ads, etc.)
- ✓ Other incidental supplies (see page 28 for sample supply list)

## FORUM FORMAT & RULES

Establishing the forum format and the rules of the day is a juggling act. One part of the schedule is set by the availability times for the venue; another is set by the number of candidates participating. If there are a large number of candidates, it may even be necessary to have more than one forum. Many Leagues have one forum for municipal candidates and a separate one for school board candidates. The addition of county and state candidates may make it necessary to schedule multiple forums.

### Establishing the format

In designing a candidate forum, it is desirable to provide for spontaneous interaction between candidates. Some possible formats, as presented in [Guidelines for Candidates Meetings](#), a publication of the LWV of Cincinnati Area, are:

- Question-and-answer with timed responses (most commonly used format)
- Loose Q-and-A crosstalk: This discussion, with questions, rebuttals, and follow-up questions, requires a strong and skilled moderator as well as articulate and astute candidates to be successful. It is especially effective for televised events.
- Cross questioning: Candidates ask each other questions and the moderator acts as a referee.
- Questions from the audience: This town meeting approach can be lively and spontaneous but some control needs to be exercised over the appropriateness of questions, the timing, and the equal treatment of the candidates.

See the complete document at [www.lwvcincinnati.org/files/candidatesmeetings.pdf](http://www.lwvcincinnati.org/files/candidatesmeetings.pdf) for additional suggestions.

Some key questions for developing a format for the forum based on the number of candidates:

- ? How many minutes for opening statements?
- ? How many minutes for each question?
- ? Will the other candidates also get to respond?
- ? Will there be closing statements?
- ? Can absent candidates send a statement to be read?
- ? Will audience submit questions on cards or go to a mike?
- ? Will there be a “meet-and-greet” time after the formal program?

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### See page 20 for SAMPLE FORUM OUTLINE

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### Establishing the rules

It is important for the League (together with a partnering entity, if applicable) to establish the basic forum rules well in advance of the event. Specifics (such as how many minutes for each speech) can be filled in later when the number of participating candidates is known. Planners should consult with the voter service chairperson of the LWVGC board to learn whether there are board recommendations and state or federal laws to be considered. (For example, a forum that is televised on a commercial station must comply with federal laws and a forum that includes candidates for state and federal offices must comply with all state and federal election laws.)

Rules should be sent to the candidates in their initial invitation, so they know what will be expected of them, and any revisions should go in a follow-up letter. Some chapters have also printed the rules in a program handout so the audience knows how the event will proceed.

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**See page 21 for SAMPLE FORUM RULES**

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*HINT: A suggested order of presentation is: 1. Mayoral candidates; 2. Council president candidates; 3. Ward candidates (possibly separate contested and uncontested).*

*HINT: The candidates, the timers, and the audience all should receive a handout that indicates the timing that is expected to be used.*

*HINT: An easy way to randomize the candidates' participation is to draw names from a container, perhaps even in full view of the audience. Be sure to use separate drawings for the opening and closing statements.*

## **VIDEOTAPING CONSIDERATIONS**

Creating a videotape of a League forum is a worthwhile idea—with some particular concerns that need advance consideration. It is difficult, even unwise, to prepare rules regarding videotaping when the event is a public meeting, involves public officials, and/or presents a ballot issue. The best way to exert some control is for the League group to make the arrangements for a complete video of the event and to couple that with a thoughtful distribution plan for its showing. Candidates should be informed in advance about such arrangements. This strategy allows the League to publicly state that its full-length version will be available in a specific manner, thus diffusing the value of any recording produced other ways. For many Leagues, the best resources for public showings are the public access/community access channels for city governments, public schools, or cable companies.

The LWVGC website will have a web page for the posting of all forum videos. Either the video itself or a link (if provided and uploaded by a collaborator) should be provided to LWVGC to provide online access.

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**See page 24 for SAMPLE CANDIDATE INVITATION LETTER DESCRIBING VIDEOGRAPHY PLAN**

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*HINT: Audiences can be asked to turn off their cell phones and other noisemakers and refrain from flash photography.*

*HINT: Camera operators from news outlets cannot be excluded from a forum, but they can be directed to the best places to set up for their benefit and the audience's.*



## INVITATIONS TO CANDIDATES

The basic approach for invitation letters to all candidates can be summarized as:

- Who: invitation letter to all approved candidates for positions covered by event
- What: formal letter & reply form, using LWVGC Education Fund letterhead and envelopes
- Where: mailed to candidate's official address of record
- When: as far in advance of event date as possible
- Why: so all candidates have an understanding of the League's expectations

As of 2015, it's still a good idea to issue your invitations to candidates by regular U.S. Postal Service mail so you know all candidates received the same basic information at the same time. Some chapters have used certified mail to be sure their invitations were delivered, but your chapter may choose to avoid that expense by using diligent personal follow-up by phone and email. You may wish to double up with an email invitation, if you have email addresses for all candidates, or with a phone call to make sure the mailing was received. (One chapter chair we know about even hand-delivered a letter directly to an elusive candidate!)

You may need to use several strategies to find contact information for candidates:

- Request addresses from board of elections
- Search for candidate websites on the Internet
- Call political party headquarters, as listed in a phone book or on a website

Helpful templates for preparing stationery, fliers, directional signs, programs, name plates and other materials are planned to be available electronically via the LWVGC website. Check with your chapter liaison or the LWVGC board voter service chairperson to learn about tools available.

LWVUS has several varieties of the LWV logo available in electronic form for use on letterhead, in publications, and in signage, and specific guidelines for the logo's use. See LWVGC website for approved versions that can be downloaded and inserted in your materials.

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### See pages 22-26 for SAMPLE LETTERS TO CANDIDATES

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*HINT: Build your event budget to include several mailings per candidate: 1) initial invitation, 2) return postage for candidate reply, 3) follow-up letter with final arrangements (or send by email, if you have accurate email addresses), 4) thank-you letter after the event.*

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

*HINT: Enclose an addressed and stamped postcard for candidates' use in accepting your invitation – but expect to have to make follow-up emails and phone calls too.*

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## Candidate Letter Checklist:

### **Initial – sent via U.S. Postal Service; also email if email addresses are available**

- League letterhead stationery and envelopes (LWVGC or LWVGC Ed Fund)
- Invitation and encouragement to participate
- Venue with address
- Date and time
- Email and/or address for candidate acceptance
- Deadline for response
- Identifies voter service chairperson, LWV chapter name and/or other sponsor
- Nonpartisan event
- Open to the public
- Brief statement of rules

### **Follow-up letter: to candidates who have agreed to attend**

Send by regular mail or by email if email addresses are available.

- League stationery
- Thank candidate for accepting
- List of sponsoring groups
- Brief description of nonpartisan forum purpose
- Format for forum (example: 2-minute opening statement; Q and A with written screened questions; questions presented by moderator)
- Order of appearance, including timeline (attach agenda if available)
- Venue address and arrival time
- Rules re campaign literature table, campaign clothing, campaign buttons
- Contact name/phone/email for questions/concerns
- Sponsors

### **Follow-up letter to absentee candidate**

Send by regular mail or by email if email addresses are available.

- League stationery
- Remind candidate that no substitute or stand-in may appear for a candidate
- Advise that candidate may submit a statement (up to 2 minutes, for example) to be read to the audience by the forum moderator
- Provide your contact name/phone/email in case candidate needs to contact you at the last minute

Reminder: Use 10-digit telephone numbers—not only are there two area codes for Greater Cleveland, but many people use cell phones that have still other area codes.

## **PUBLICITY**

What if you produced a forum, assembled the candidates, and no one came? You need a great publicity campaign to make sure that as many people as possible come to hear what the candidates have to say.

Coordinate with LWVGC outreach chairperson as soon as you have basic forum schedule in mind. This way your event publicity can be included in any overall outreach activities that will be highlighting area-wide forums.

Note: If your candidate forum will also include Cuyahoga County candidates and/or state officeholders such as State Representative, State Senator, or State Board of Education, you will need to widen the scope of your publicity plan. Talk to the LWVGC outreach chairperson for suggestions and procedures.

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**See page 27 for SAMPLE PUBLICITY PLAN**

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## **ASSEMBLING PEOPLE AND THINGS**

Once your event is scheduled, it's time to pull together the people and things that will make it go like clockwork. Just collecting and packaging all the supplies can take an inordinate amount of time. By using a specific checklist (see sample), this task can be assigned to a specific volunteer who rounds up everything, transports it to the meeting, and gathers it up afterwards. If you need to purchase items and your event is funded from the League's Education Fund, you can eliminate paying sales tax by obtaining an exemption certificate from the LWVGC treasurer.

Next come the jobs of selecting and orienting a moderator and selecting and orienting those who will act as question-screener and other roles. It's a good idea to keep the chapter chair or forum planner free from a specific job so someone is available to handle last-minute issues without abandoning a key post.

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**See page 28 for SAMPLE CANDIDATE FORUM SUPPLY LIST**

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## 2. STAGING THE EVENT

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### MODERATOR GUIDELINES

The choice of a moderator is very important. The moderator calibrates the flow of the event and establishes the tone of the event as one of reason and balance. Most chapters have found that a moderator from a neighboring chapter is a good idea, especially if there is controversy in your community. The voter service chairperson on the LWVGC board should be contacted for suggestions of persons who have moderator experience.

If you have decided to have oral questions from the audience, the choice of a moderator is crucial. It must be someone who can intervene firmly when a speaker does not conform to time limits or question guidelines.

Usually a moderator is selected for the following attributes:

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

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

The moderator plays a key role in the success of the meeting, so you should provide as much help as possible. Prepare your moderator with the following, in advance of the event date:

- A detailed time schedule
- Rules for the event
- Correct pronunciation of names of candidates
- A copy of the program for the event
- Salary, duties, and length of term for each office
- Election hours and any other quirks about the election itself
- Any touchy situations that could arise
- Recommended script (send by email so moderator can print her/his own copy in the preferred font size and spacing)

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**See page 29 for SAMPLE MODERATOR SCRIPT**

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## TIPS FOR MODERATORS

1. Treat all candidates the same. It may be preferable to use the titles Mr., Mrs., Ms., Dr., but not mayor, judge, representative, senator, etc. The person is a candidate and not serving the elected position as a candidate. Also, sometimes the candidate may be running for an office different from that which he/she holds as an incumbent.
2. First names should not be used, even if you know the candidate well enough to do so or if the candidate is as young as your grandchildren.
3. Practice pronouncing names repeatedly until they come naturally.
4. Know the total plan for the evening, including the issues that may be on the ballot and the times allotted for speaking and rebutting.
5. Restate the guidelines for the forum before candidates start their presentations.
6. Be prepared with information you can read to fill in gaps in time if needed (e.g., information about the League, election dates, important voter deadlines).
7. Keep an eye on the timekeepers for their signals and steel yourself to be firm about time limits. A candidate may finish a sentence, but not a paragraph! This is fair to all candidates and the audience.
8. Keep the guidelines for questions at hand in case you need to restate them during the forum. It helps the moderator to have the question guidelines printed at the bottom of the program so that she/he can use it for reference during the forum.
9. Test sound equipment just prior to the event start time to make sure the audience can hear both you and the candidates. Remind and re-remind the candidates to speak directly into the microphone.
10. Use your microphone (and your outdoor voice) to control a problematic situation.
11. Feel comfortable in omitting questions that are inappropriate and confrontational. Reword questions, as you see fit, even if screeners already have rewritten them.
12. Never offer an opinion on subject matter under discussion.
13. Be firm but friendly, calm and gracious, regardless of what is happening. A smile often cuts through a tense situation. Remember, the moderator is in charge.
14. Be prepared for awkward situations with useful phrases like:
  - “We realize that many of you have strong feelings on some of these issues, but the rest of us have come tonight to become better informed by listening to the candidates themselves.”
  - “Some of you are already committed to this issue, but many here are not; you do not help your cause by interrupting someone who is talking.”
  - “It might be nice to hear more personal views in detail, but we must restrict ourselves to the candidates’ interpretations.”
  - “Please phrase your statement as a question to the candidates.”
  - “We know some of you have not had your particular question addressed. The screeners combined similar questions of general interest to the audience in the limited time we had. If your question was not answered, please ask your question of the candidate after the forum.”
15. Remember you have the right to adjourn a meeting that becomes unmanageable.

## QUESTION-SCREENING GUIDELINES

A question-screening committee is needed to help the moderator. Multiple questions on a topic (some with great detail), questions prefaced with long statements, or questions with hostile/controversial wording are too much to ask a moderator to handle in addition to coordinating candidates and timing for the current question.

In addition, the use of a question-screening committee helps to—

- Focus questions
- Allow a reasonable number of questions with a range of topics asked of all candidates
- Prevent grandstanding.

A question-screening committee should strive to—

- Avoid duplication/repetition
- Provide diversity of topics
- Ensure clarity
- Ensure appropriateness (including language)

Set-up suggestions for question-screening committee:

Blank cards  
Pens  
Paper clips  
Chairs  
Table

### **Suggested procedure for question-screening committee:**

As you receive the cards from ushers, sort them according to topics.

Read each carefully; combine duplicate or related questions; rewrite when appropriate. Use guidelines given to the audience to help you. Questions not meeting these standards may either be rewritten or rejected. Weed out questions which are personal attacks or use profane/offensive language.

When questions have been combined because of duplication or being related, paper-clip all cards together, with the rewritten question on top and labeled as rewritten.

Short questions on different aspects of the same topic are better than a long, involved question.

Screeners should try to give each candidate approximately the same number of questions.

Screeners may suggest to the moderator which questions should be addressed to all candidates, instead of to a single candidate.

*HINT: Place the screeners at a location that is difficult for the audience to observe how the question cards are being sorted.*

*HINT: Assign a runner to take prepared questions from the screeners to the moderator.*

*HINT: When all questions submitted cannot be covered, provide moderator with those cards (or a written topical summary) so he/she can acknowledge the range of questions received.*

## **HANDLING SPECIAL SITUATIONS**

### **Judicial candidates**

Forums that plan to include candidates for judicial office need to be aware that judicial campaigns are more carefully regulated than other campaigns. Judicial candidates may not make statements that create an impression of partiality or that seem to pre-judge a legal controversy. Consult [www.ohiojudges.org](http://www.ohiojudges.org) for suggestions from the Ohio Judicial Conference on phrasing questions for judicial candidates. (It is advisable for the judicial office section of a forum to have a different format, with questions prepared in advance by the League.)

### **Late, absent and reluctant candidates**

See the League of Women Voters of the United States website ([www.lwv.org](http://www.lwv.org)) for some well-tested suggestions for special situations that may arise. [FAQ's – League candidate forums and debates](#) at that site may be especially useful: [forum.lwv.org/member-resources/article/faqs-candidate-forums-debates](http://forum.lwv.org/member-resources/article/faqs-candidate-forums-debates). Some of its points are excerpted below.

#### ***What if a candidate is unopposed?***

LWVUS recommends that a debate for this office not be held. Instead, unopposed candidates might be invited to meet and greet attendees at the end of a candidate forum and/or contribute a statement to your voter guide. (Check with LWVGC voter service chairperson to see if there are state or local laws that have implications for this situation.)

#### ***What if one candidate in a two-person race declines to participate?***

Although that particular race will have to be excluded from the forum agenda if only one of the two candidates is available, it is recommended that special effort be made to encourage candidate attendance. LWVUS advises that there may be ways within the community, through the media, or with coalition partners or others to encourage the reluctant candidate to appear. (If the candidate continues to refuse to attend, the League might ask for short statements from both candidates to be read aloud by the moderator as part of the forum.)

#### ***What if one candidate is late for the forum?***

The moderator has the prerogative to change the agenda on the spot, moving to a race in which the opposing candidates are all present. As long as at least two candidates for the same

race are present, it is acceptable to continue with the forum. If the late candidate arrives after their slot on the program has occurred, the candidate may be invited to meet and greet attendees at the end of the forum. (The moderator may need to adjust the question-and-answer timing on the spot to accommodate this.)

***What if one candidate cancels because of an emergency?***

As a basic rule, if there are two or more candidates present for a given race, the forum can proceed. However, the handling of this situation is very dependent on how the races are structured. For example, a council-at-large position might have many candidates, but a ward council position may only have two. Some school board candidates may be running for a specific unexpired term, while others are running for a full term.) Even if the elections are nonpartisan, it is important for the League to protect its nonpartisan reputation by preventing the forum from turning into a solo candidate appearance, which could seem more like a campaign rally to the audience. In announcing the cancellation of a candidate, the moderator should state the reasons provided by the candidate.

***If an empty-chair debate is not permitted, how can the League defuse an angry audience and candidates?***

League members, and particularly the moderator, need to be mentally prepared for criticism. Calmly state the League's high standards for candidate forums and nonpartisan reputation. Announce any applicable state or local regulations that do not permit empty-chair debates. (A useful follow-up might be a letter to the editor of your local newspaper that states the League's reasoning for its decisions regarding candidate forums.)



# 3. VOTER GUIDE SPECIFICS

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Many League groups decide to tackle candidate forums and voter guides all at once, for the same election season. Fortunately, many of the preparation steps overlap. For example, a single invitation letter to candidates can ask for their participation in both the forum and the voter guide. But separate rules need to be designed for voter guides; this can be done well in advance of the candidate filing deadlines.

The work of compiling, editing, and designing a voter guide will need to be done in the short window between the candidate filing date and the first day that early voting begins, meaning that volunteer recruitment should be completed as early as possible. Here is a checklist of the preparations that can be completed weeks, even months, before the candidates are known.

- Decision to produce a voter guide
- Decision to conduct candidate forum(s)
- Selection of a printing company and/or website
- Recruitment of volunteers
- Development of candidate questions
- Development of candidate questionnaire
- Collection of facts such as length of term, salary, term start date

## Dealing with candidates who do not respond.

- Make a final attempt to contact the candidate, telling him/her that you will print “Did not respond” unless you receive the completed questionnaire by date certain.
- Simply list “Did not respond” in the space where responses would be printed
- Provide only the factual information that is a matter of public record – name, address, etc.

Key questions that determine whether a voter guide is nonpartisan:

- ? Do the questions cover a broad range of issues related to the broad interests of the electorate? For example, do the questions address all issues of importance to a specific elected office or reflect a truly broad range of concerns within your issue area?
- ? Are the questions or any description of the issues clear and unbiased in both structure and content?
- ? Are the questions posed to candidates identical to the questions you later publicly print or post online?
- ? Are the candidates given a reasonable amount of time to respond?
- ? If the questions ask the candidates to respond with yes or no or undecided, are candidates given the opportunity to give short one- or two-sentence explanations to explain their positions in their own words?
- ? Have all major candidates responded?

## 4. ISSUE FORUMS

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Material provided in this toolkit in 1. FIRST THINGS FIRST is equally applicable to the planning process for an issue forum. Some of the suggestions in 3. STAGING THE EVENT will also be useful.

The two main considerations for a League-sponsored issue forum are the selection of the issue and the selection of the speakers. A capable moderator is a must. The use of timed segments (and timers) can assure a smooth-running event. Formats that include audience questions help further the attendees' understanding of the issue.

It is often a ballot issue that spurs the idea for a public forum. The League may be the community's most highly respected, nonpartisan sponsor for such a program and with that reputation comes considerable responsibility for the design of the event. Every effort should be made to provide pros and cons on the issue, to balance the length of all presentations, and to avoid coverage of the League's own advocacy position on the issue. The community may not perceive the forum as "fair and balanced" if the League already has taken a stand. A more prudent approach is for the League to make its decision on the issue after the forum has taken place.

If the issue forum is to be funded from League's 501(c)3 education fund, there are Internal Revenue Service regulations to be followed.

LWVGC board members can be helpful in locating names of qualified speakers and in connecting chapter planners with others who have an interest in a particular ballot issue or other topic.

The LWVUS website, [lww.org](http://lww.org), is another valuable resource for those planning an issue forum. On the website, you can find web chat-type discussions among League members who have planned and presented issue events. Some discussions explain why a League decided not to pursue a thorny issue as a sponsor.

Other useful materials for planning and presenting forums may be found at the National Issues Forum website, [www.nifi.org](http://www.nifi.org).

**Note: the League's position for or against a ballot issue should not be noted in any candidate or issue forum that is being underwritten by the League's education fund monies.**

# 5. AFTER IT'S OVER

---

In a busy League year, it's easy to overlook some important pieces that should follow a candidate forum, an issue forum, or a voter guide. Three such necessities are:

## **Candidate follow-up letters**

By letter or by email, be sure to thank each candidate for participating in your event and/or voter guide. Add any information about the availability of the videotaped presentation or the printed material, as applicable. Keep those lines of communication open!

## **Participant thank-yous**

Our mothers tried to make “please” and “thank you” automatic, so plan to do thank-yous as soon as possible – by mail, by email, by hand-delivered bouquets, or whatever strikes your fancy. Reach down to say thank you, as well, to people who provided helpful service around the edges – husbands who hauled goods, librarians who directed traffic to your event, etc.

## **Evaluation**

A solid evaluation session would make a great chapter meeting after the elections are over. Talking in detail can be educational for new members who are just learning League ways. The persons who were deeply involved in the planning can gain valuable insights from those who were observing at arm's length. This is also a time, place, and way to establish precedents for future forums and guides so that every detail does not have to be designed and approved year after year. (Without those precedents that our several chapters have had well in hand for years, this toolkit could never have been produced.)

An evaluation session is also a good time to think about the many ways that the League can be providing voter education in future years. Here are some starter ideas:

- Special materials or events for visually impaired and hearing impaired persons
- Connections with voters attending English-as-a-Second-Language classes
- Audio or video presentations for senior citizen centers & assisted living facilities
- Unique locations for reminders to register to vote and to vote (street banners, bus signs, bumper stickers, phone messages)

# Samples

## SAMPLE TIMED OUTLINE FOR CANDIDATE FORUM

---

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

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

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

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

## SAMPLE FORUM RULES

---

- We ask candidates and their supporters to refrain from wearing partisan items, such as campaign buttons, inside this room. Campaign materials may be placed on the literature table outside in the lobby.
- Each candidate must appear in person and at the time slotted for his or her race. No stand-ins are permitted.
- Each candidate will have 1 minute for an opening statement and 30 seconds for a closing statement after a question and answer session. Time limits will be strictly enforced. Our timer will give candidates a 30-second warning and a signal when their time has ended. To keep things moving, we also ask that candidates use one of the table microphones and stand at their place at the table when delivering opening and closing statements.
- The order of speaking will be determined by drawing lots. The candidate who makes the first opening statement will make the last closing statement.
- Only written questions will be accepted. Cards for writing questions will be distributed to the audience before and during the forum. Succinct questions should be addressed to one or all candidates. Other candidates will have the opportunity to answer a question addressed to only one candidate, if appropriate. Candidates will have one minute to answer the questions.
- League question-screener will review submitted questions in order to avoid duplication, provide a diversity of questions, ensure readability, and avoid inappropriate (e.g., ad hominem attacks) or irrelevant questions (e.g., a foreign policy issue question for a county race).
- In order to maximize the time for candidates to answer questions, we will ask the audience to avoid expressions of support or opposition to any candidate during the presentation time or answers to questions.
- This is a forum to hear and question the candidates. It is not planned as a debate between opposing candidates.

--from LWV's Cuyahoga County Executive Forum, October 15, 2014

# SAMPLE INVITATION LETTER TO CANDIDATE

---

[Use LWVGC letterhead/logo]

[month] XX, XXXX

Dear [candidate name],

The \_\_\_\_\_ chapter of the League of Women Voters of Greater Cleveland invites you to participate in a nonpartisan candidate forum for the [month] [year] judicial, municipal and school board election in [city]. The forum is scheduled for [month-date] at [time] in the [site], [street address] in [city]. This forum is open to the public.

This year we are opening the forum with the contested positions. Clerk of Court candidates will be first, followed by the Council-at-Large candidates. All other candidates will appear in the following order:

Mayor  
Wards 1, 2, 3, 4  
Director of Law  
School Board

The format of the candidate forum:

- Candidates will appear together in groups according to elected office.
- Each candidate will be allowed a [#]-minute opening statement followed by questions from the audience.
- Time limits will be strictly enforced.
- Candidates will receive a 30-second warning and a signal when allotted time has expired.
- Written questions for candidates will be submitted by the audience, screened for duplication by a question-screening committee, and asked by the forum moderator to individual candidates.
- No substitute or stand-in may appear for a candidate.
- If a candidate indicates that he/she will be unable to attend the forum, please submit a statement (up to [#] minutes) to be read to the audience by the forum moderator.

We encourage you to be a part of this important effort. It gives you an opportunity to speak to the community. Please confirm your acceptance of this invitation by email to [email address] at your earliest convenience. After receiving your confirmation, you will be sent a final agenda via email closer to the date of the event. A table will be placed in the hallway for your campaign literature. No campaign material or literature is allowed in the forum hall during the event. Please plan to arrive at least 30 minutes before your scheduled group time and check in at \_\_\_\_\_ table upon your arrival.

Thank you in advance for your cooperation in making this a fair, informative, and nonpartisan event. If I can be of assistance, please call me at xxx-xxx-xxxx or email [email address].

Sincerely,

[name]  
Voter Service Chairperson, \_\_\_\_\_ chapter

# **SAMPLE CANDIDATE INVITATION LETTER WITH REPLY FORM**

[use League letterhead/logo]

Date  
Name  
Street  
City State Zip  
Dear [name]

As a candidate running for a contested seat on the [month] [date] [year], ballot, the \_\_\_\_\_ chapter of the League of Women Voters of Greater Cleveland would like to invite you to participate in a [city] candidate forum on [date] at [time]. This meeting will take place at [location]. At this time, you and your opponent(s) will be asked questions posed first by a League moderator and then by members of the audience. Although you may not wear any campaign attire, you are welcome to provide print materials for the audience to take home.

Please call me at xxx-xxx-xxxx if you have additional questions about this invitation.

In order to plan this public event, may we please have a written acknowledgment of your agreement to participate? Please return the tear-off form below to me by [date].

You will receive additional information from us about this forum two weeks prior to the event.

Sincerely,

\_\_\_\_\_, chapter chairperson

+++++

(Check one)

\_\_\_ Yes, I would like to participate in the \_\_\_\_\_ candidate forum on \_\_\_ date \_\_\_

\_\_\_ No, I am unable to participate in the \_\_\_\_\_ candidate forum on \_\_\_ date \_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Preferred phone number (for our use) \_\_\_\_\_

Preferred email address (for our use) \_\_\_\_\_

Signed \_\_\_\_\_

[enclose a stamped, pre-addressed envelope]

# **SAMPLE CANDIDATE LETTER INCLUDING VIDEOGRAPHY PLANS**

---

**[Use letterhead/League logo]**

[date]

Dear candidates for \_\_\_\_\_ city offices,

We look forward to seeing you at the [date] LWV candidate forum. Please note that we have changed the venue to the \_\_\_\_\_ high school in order to accommodate a larger audience. An advance copy of the program is attached.

We have hired a professional videographer to make a complete record of the forum. We particularly want to reach voters who might not be able to drive at night or who have disabilities that make attending the forum a hardship. In addition to offering a Vimeo version on our League website, we are working to arrange viewings at the library, \_\_\_\_\_, and \_\_\_\_\_.

As candidates, you voluntarily participate in LWV forums because you trust that we will ensure a fair discussion that focuses on issues important to our community. The principles of the national League of Women Voters that are included in the participation agreement that you signed embody our assurance to all of you that your words and your image will be presented in their full context. You are all welcome to link to our full, uncut video via [website address].

If you have any questions, please do not hesitate to contact us.

Sincerely,  
\_\_\_\_\_, chairperson, \_\_\_\_\_ chapter

Phone: xxx-xxx-xxxx

Email: xxxxxxxxx@xxx.xxx



# SAMPLE CANDIDATE FOLLOW-UP LETTER WITH FORMAT & RULES

---

[Use League letterhead/logo]

[Date]

[Candidate name]

[Street address]

[City, State, Zip]

Dear \_\_\_\_\_

On behalf of the \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ chapters of the League of Women Voters of Greater Cleveland, I would like to thank you for agreeing to participate in our candidate forum. This nonpartisan forum is set for [day]. [date] at X: XX pm at the [place] at [street address] in [city]. Both candidates for representative to the Ohio House, District XX, have agreed to participate. This forum is open to the public.

The format is as follows:

- Candidates will appear on the stage together and will be introduced by the forum moderator.
- Each candidate will be allowed [#] minutes for an opening statement, followed by questions from the audience. Written questions for the candidates will be submitted by the audience, screened for duplication by our question-screening committee, and asked by the moderator to the candidates.
- Each candidate will be allowed [#] minutes to answer a question. Questions may be directed to one or to both candidates; each candidate may answer a question that is directed to another candidate.
- No candidate may speak after the time allotted. Time limits will be enforced; candidates will receive a 30-second warning and a signal when the time has expired.
- Candidates will be reintroduced to the audience after the Q&A and will have [#] minutes to make closing remarks.
- No substitute or stand-in may appear for a candidate.
- If a candidate indicates that he/she will be unable to attend the forum, he/she may submit a statement (up to [#] minutes in length) that will be read to the audience by the moderator.

Please plan to arrive at least 30 minutes before the scheduled time and check in with an LWV representative upon your arrival. No campaign material or literature is allowed in the hall during the event, but a table for candidate campaign material distribution will be available outside of the hall.

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

\_\_\_\_\_, Chairperson of the \_\_\_\_\_ chapter,

## SAMPLE CANDIDATE FOLLOW-UP LETTER

---

[Use letterhead/logo]

[month] [day], [year]

Dear [first] [last name]

The sponsors are pleased that you have accepted our invitation to participate in the candidate forum to be held on [day], [date], at [time] at [site], [street address] in [city].

The evening is not planned as a debate between opposing candidates, but rather will provide a forum so that you may discuss anything you wish relating to your candidacy. The meeting will be formally structured, using an experienced, impartial moderator.

All candidates are requested to check in upon arrival at the high school. You will be directed by greeters to the proper room. The candidates will appear in the following order: 1. Candidates for city council. 2. Candidates for mayor. 3. Candidates for school board.

No substitute may appear for a candidate. No candidate will be allowed to speak after the time allotted for their group. The moderator will introduce candidates. Each candidate may speak for [#] minutes. A question and answer period for each group of candidates will follow. Questions from the audience will be written and will be read by the moderator.

We thank you again for your participation. If I can be of assistance call me at xxx-xxx-xxxx.

Sincerely,

[name]

Candidate forum chairperson,  
\_\_\_\_\_chapter

## SAMPLE PUBLICITY PLAN

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- Determine publication and deadlines dates for local papers, newsletters
- Develop a schedule for ad placements (if any)  
write ad copy & submit per publications' requirements
- Schedule and prepare press releases  
use LWVGC or LWVGC Ed Fund letterhead  
mail (or email) to weekly newspapers for your area  
mail to mayor's office, board of education office)
- Submit on-line postings  
calendars for same weekly newspapers as above  
city website  
any other community calendars available  
www.cleveland.com  
**LWVGC website**  
**LWVGC Facebook**  
**LWVGC Twitter**  
**Vote411**
- Request space on outdoor bulletin boards  
city hall  
board of education  
other
- Prepare and distribute printed fliers  
pin to bulletin boards:  
senior center  
recreation center  
library  
police station  
fire station  
supportive merchants (grocery store, fitness centers)  
teachers' lounges at schools  
city hall  
deliver take-away handouts:  
senior center  
recreation center  
library  
board of education office
- Email (early notice, plus last-minute reminders)  
general election candidates  
officeholders who are not running  
city department heads  
chapter members  
school superintendent and communications director

## SAMPLE CANDIDATE FORUM SUPPLY LIST

---

- Directional signs
- Script for moderator (copies to timers & screeners)
- Signs: ***candidates forum*** and ***candidates sign in here***
- Materials for use in drawing lots for candidate speaking order
- Table name cards for candidates, extra cards and markers
- Water for candidates—disposable cups and pitchers or bottled water
- League banner or posters (literature table, podium)
- Index cards and pencils for audience questions
- Timer’s sign cards (30 seconds, 15 seconds, stop)
- Stopwatch
- Sign-in sheets for candidates
- Sign-in sheets for audience
- Programs
- Membership forms, other timely literature
- Name tags & League buttons for volunteers
- Programs
- Absentee ballot applications
- Voter registration forms (even if after deadline)
- Voter guides
- Tape (cellophane, masking, duct)
- Scissors
- Pens/markers
- Notepad
- Rubber bands, safety pins, paper clips

## SAMPLE SCRIPT FOR MODERATOR

7:05	<p>Good evening, my name is _____ and I will be your moderator for this event. Welcome to the LWV candidate forum for candidates and/or issues running for _____.</p> <p>Optional: we are co-sponsoring this event with _____.</p> <p>reminder to turn off cell phones and beepers</p> <p>reminder that flash photography is not appropriate</p>
7:10	<p>The League of Women Voters is a nonpartisan political organization, which means we do not support candidates or political parties. We can, however, take positions on issues when they can be based on League studies.</p> <p>It is League policy to ask that no one display campaign buttons, signs, or literature within this room. The table in the hall] back of the room] contains materials for the audience to take with you.</p> <p>Please look at your program, which includes the names of candidates, issues in the election, rules for asking questions, and time limits to be imposed on both the candidates and audience.</p>
7:14	<p>Format for event: After hearing remarks by (# of speakers), the forum will open for questions. At the close of the forum, the discussion may informally continue outside of this room. If your question does not get asked, please use this opportunity to approach a candidate.</p> <p>We will rotate asking questions of candidates so everyone has a chance to be both first and last.</p>
7:16	<p>I would like to introduce the following candidates: [by name &amp; candidacy]</p>
7:??	<p>We will begin the presentations by each of our (#) speakers. They may speak for (time).We have timers sitting here in front who will hold up cards to keep you up to date on the time.</p> <p>After our presenters have finished, League members [or students or co-sponsors] will collect written questions to be given to screeners. (If you take oral questions, direct the audience to the microphone and remind them of the time limit.)</p>
	<p>[proceed through scheduled presentations]</p>

# SAMPLE VOTER GUIDE QUESTIONS

---

## Sample questions for board of education candidates

1. What do you see as the (main/two/three/four) issues facing \_\_\_\_\_? What are your priorities for addressing those issues?
2. What ideas do you have for reorganizing resources in a way to use tax dollars as efficiently as possible?
3. What is your plan for the long-range fiscal and academic integrity of the district?
4. What experience and knowledge base do you have that will make you an effective leader on the board of education?
5. What additional technological initiatives, if any, would you like to see implemented in our school system?
6. What do you believe is a board member's role in relation to curriculum and curriculum development?

## Sample questions for city council member or board of education:

7. In an era of shrinking resources, what are your priorities for developing a budget for \_\_city\_\_\_\_? Where would you make reductions in spending?
8. What do you see as the (two/three/) most important issues facing \_\_city\_\_\_\_ in the coming four years and what would be your recommendations for (board) (council) action?
9. Are there innovative programs that have been implemented in neighboring communities that you would like to see happen in \_city\_\_?

## Sample questions for city council:

10. State revenues are declining and property tax income is ..... What ideas do you have for offsetting these losses and balancing the city's budget?
11. What is your view of regionalization and collaboration arrangements with adjoining cities?
12. What are the (#) most important issues facing the city?
13. What is your vision of what \_\_city\_\_\_\_ will be like in ten years?
14. What issues are most important to citizens in your ward?
15. What city services do you believe could be contracted out in order to reduce expenses?

## SAMPLE INVITATION LETTER FOR FORUM + VOTER GUIDE

---

[chairperson's home address]  
[chairperson's city & zip]  
[month] [date][year]

[First name] [Last name]  
[Address]  
[City] [State] [Zip]

Dear Candidate:

The League of Women Voters is a nonpartisan organization dedicated to promoting active informed participation of citizens in their government. As a candidate for public office this year, we invite you to participate in two voter education projects, a print and on-line voter guide and a public candidate forum.

The League will publish a voter guide with information on all candidates for local office to be distributed throughout the two communities before the [month] [year] election. We will also post the information on our website: \_\_\_\_\_.

We would like you to fill out the enclosed questionnaire, being careful to observe all word limitations. Please sign and return it to me by [date]. Be sure to make a copy for your files. Although the guides will not be printed until [month], we will include your response on the website as soon as it is received. Your answers to the first two questions will be included in the printed guide. All answers will be posted on the website. The League will not alter, edit or evaluate any candidate's reply. Each candidate is solely responsible for the truth of his (her) statements. Each candidate's answers are accepted only on the understanding that the published material will not be used in any way that may be deemed to be an endorsement of your candidacy or views by the League of Women Voters. The League cannot use any campaign material.

Also, please plan to participate in our candidate forum which will be held this year at 7:00 pm, on [day], [date], at [place], [address]. Please return the enclosed postcard by [date] to [name] to indicate your participation. She will contact you [date] with details about that forum. Her phone number is xxx-xxx-xxxx.

Thank you for your cooperation. If you have any questions, please contact me by phone or email.

Sincerely yours,

[name]  
Voter service committee,  
\_\_\_\_\_ chapter  
Phone xxx-xxx-xxxx – fax xxx-xxx-xxxx  
Email: \_\_\_\_\_

Enc: 3

## **SAMPLE CANDIDATE THANK-YOU LETTER**

---

[use letterhead/League logo]

[date]

Dear \_\_\_\_\_,

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

Sincerely,

[name]

Voter service chairperson

\_\_\_\_\_ chapter

\* insert dates/times/places when videotape will be shown and/or when print voter guide will appear.



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