

Holding a Candidate's Forum on Housing and Homelessness

Why Hold a Public Forum on Housing and Homelessness?

- **EDUCATE:** Few educational techniques are more effective than personal testimony. Those who attend the forum and those candidates who participate will long remember the moving stories of people struggling to make ends meet and the success stories of community groups beating the odds.
- **ORGANIZE:** A lot of people think you have to be a social worker, builder, or an architect to get involved in solving America's housing crisis. By de-mystifying the subject of housing; helping people understand local, state and/or federal programs; and explaining to them what is happening in your community, you make it easy for them to get involved.
- **EFFECT CHANGE:** You can send a forceful message to those in power and those who aspire to power by organizing a forum that displays how many people are knowledgeable and concerned about the issue.

Complying With the Law

Community Candidates' Forums are a legitimate activity for 501(c)(3) organizations and are an important vehicle for informing your community. Should you decide to organize one, however, you must pay close attention to the law.

If, as a nonprofit organization that receives tax-deductible donations, you are planning to educate the public about candidates or issues near election time, you may want to get legal advice. You need to make sure that no one -- either a candidate or a member of the public -- has any reason to believe that you have departed from your nonprofit mission and gone into partisan politics. Whether you lose the respect of the community, or whether you lose your nonprofit status, the cost to your primary mission will be too high. If you are concerned about any aspect of the approach we are recommending, visit www.irs.gov/charities/index.html to find out more about the guidelines for nonprofits participating in election activities, or consult an attorney.

The how-to approach that we offer you in this packet describes a way to educate citizens about homelessness, housing issues, and candidates' positions without getting into partisan activity. We do not guarantee it will work for everyone, but we believe it offers one legitimate model for nonprofits that want to educate the community in the midst of an election year.

It is important that 501(c)(3) nonprofit organizations observe nonpartisanship in effort they undertake! It is a principle that people expect us to uphold and use because the people who share our community service goals come from many different political backgrounds. People want to know that we are fair and evenhanded, and that we do not turn anyone away because of their political beliefs. It is also a principle embodied in the tax law that governs nonprofit organizations. Few possessions are more precious to your nonprofit organization than your 501(c)(3) status given by the Internal Revenue Service. If the IRS finds that your organization is acting to support a particular party or candidate, they will take away that status.

Elections are an integral part of a healthy, functioning democracy. Helping voters become better informed about the candidates running for office and about the issues vying for attention is a legitimate activity for a nonprofit. However, trying to influence how people vote or helping or harming the interests of a candidate or party is not a legal activity for a tax-exempt nonprofit.

It is not enough to avoid putting up signs or passing out fliers in support of one candidate or another. If you set up an event trying to make one candidate look good or one party look bad, that could be interpreted as partisan activity. You must avoid packing the crowd at an event with one candidate's supporters, or asking loaded questions to make one party's positions look bad. Even the appearance of doing these things can hurt your reputation and takes away your nonprofit tax-exempt status. To avoid jeopardizing your 501(c)(3) tax status, we suggest you follow these guidelines:

• **Which candidates to invite and how to invite them:**

The forum can be limited to candidates representing major parties and significant and serious third party candidates. During a primary season, the forum can be limited to those candidates of one party who are running in the primary. *Just sending out an invitation is not enough.* Be reasonably certain that, through preliminary contact with their campaigns, at least the major party candidates will show up. You may want to make the invitations to the candidate's contingent on all of them accepting. Use a phone log for each call made to candidates' offices.

• **What to do if a candidate cancels:** If a candidate cancels at the last minute, strongly urge his or her office to send a staff person or other representative. If a candidate or his or her representative fails to show up make it clear to the audience that you did everything possible to ensure equal representation. **DO NOT** use the empty chair tactic trying to evoke negative sentiment for a candidate unwilling or unable to appear; it may be viewed as a partisan setup.

• **Whom to choose as a moderator:** Choose a moderator who is perceived by the community as neutral and who will not favor any particular point of view. A good choice would be an academic or media personality.

• **How to structure the forum:** We suggest that you have experts on homelessness/housing (including homeless and formerly homeless people) talk about the homelessness/housing situation instead of having audience members ask specific questions. They may describe what needs to be done, but should not ask for any response from the candidates or ask any specific questions of them.

After the panelists speak, give the candidates time to respond to what they have heard. Of course, all candidates must get equal time and should be treated identically and fairly by the moderator. Remember, your purpose is to educate, not to promote the interests of any candidate or party. The moderator should be instructed to introduce and close the forum with a statement explaining that the forum has been a nonpartisan community education project and is not designed to favor any candidate or party.

We understand that we are recommending a type of forum in which the community at large is not going to have a chance to ask questions or respond from the floor to the candidates. This requires a prepared and tough moderator. It also means that the experts on your panel should be knowledgeable enough so that people in the audience who care about homelessness and housing issues will feel represented by them. We suggest that you plan a reception to follow the event and that you encourage community members to talk one-on-one with the candidates there.

Ensuring a Successful Forum

To host a successful forum, pay special attention to:

- Assembling a representative panel that can talk about local housing and homelessness facts and concerns
- Taking the time to prepare panelist(s) and the moderator
- Getting candidates of both parties to attend and participate
- Generating interest among the media about the event
- Getting the word out to the community
- Getting commitments from fellow organizers to conduct a follow-up to the event.

To get these tasks done, we suggest that you set up a coordinating committee to be responsible for the important decisions and a number of subcommittees to handle the details.

The Coordinating Committee

The coordinating committee should be comprised of representatives from a wide range of local constituencies including: low income people, people who are currently and were formerly homeless, local/statewide housing and homeless coalitions, social worker/provider networks, religious groups, labor unions, low income and consumer groups, and senior citizens groups. In order to ensure broad community support, incorporate into the coordinating committee as many diverse groups as possible.

REMEMBER: Make it clear to all the groups invited that the Candidates' Forum is for the discussion of housing and homelessness issues only, not for all of the problems facing the community. This is necessary because no single forum can do justice to more than one issue at a time. It will also help focus the comments of panelists and candidates, which in turn will help hold the audience's attention. The committee's responsibilities can include:

- a) Establishing the procedures that will guide the ad-hoc coalition sponsoring the forum
- b) Establishing a time line in which to accomplish the event (sample enclosed)
- c) Confirming the availability of candidates
- d) Selecting the site, date, and time
- e) Drawing up a budget (suggestion sheet enclosed)
- f) Authorizing the work of subcommittees
- g) Choosing community panelists, such as:
 - People who are homeless/formerly homeless
 - Community leaders working to end the housing/homelessness crisis
 - Members of social service organizations stretched too thin
 - Union members who are unable to find affordable housing
 - Tenants fighting to preserve their homes
 - Interfaith groups building homes.

- h) Choosing a moderator responsible for:
 - Explaining the ground rules to panelists, invited guests, and the audience
 - Being the timekeeper and maintaining order to ensure that the forum runs smoothly
- i) Choosing which candidates to invite
- j) Developing and evaluating and follow up plans

Subcommittees

The subcommittees you create might include a) public relations/media, b) community outreach, c) liaison with candidates, d) finance, and e) site coordination. Subcommittees allow you to both delegate responsibility and involve a wide range of groups in the planning process.

a) Public Relations /Media Subcommittee:

This subcommittee could be responsible for coordinating media coverage for the event and developing media packets. The subcommittee may want to designate a member to act as a resource for the media and general public.

b) Community Outreach Subcommittee:

This subcommittee could be responsible for ensuring a high community attendance at the event. Remember, the more people who actively participate in planning the event, the easier it will be to receive a large turn out. Some of the ways this can be accomplished are:

- Requesting promotion from the broadcast community
- Contacting appropriate individuals and organizations by mail, phone, or in person
- Developing and distributing flyers and leaflets
- Developing small display ads and submitting them to community newspapers in the hope of getting free advertising

The subcommittee may want to establish an email list or tap into the coordinating committee's email lists. In addition, this subcommittee might want to take responsibility for setting up transportation networks to help people get to and from the event.

c) Candidate Liaison Subcommittee:

This subcommittee could be responsible for communication with all candidates, including making the initial phone calls to all of the candidates chosen by the Coordinating Committee, keeping a candidates phone log, writing confirmation letters, and being the main contact for the candidates prior to and during the event. Sample letters and phone scripts are enclosed at the end of this guide.

d) Finance Subcommittee:

This subcommittee could be responsible for working with the Coordinating Committee to develop a budget and raise funds for the event. Even though you will want to maximize in-kind contributions to cover educational and publicity materials, reception costs, postage and other costs, you may find that the act of making some people solely responsible for finances will help generate income.

e) Site Coordination Subcommittee:

This subcommittee could be responsible for securing the room, setting up the room prior to the event (arranging furniture, checking microphones/lighting, and hanging banners), and returning the room to its original state after the event. The site should be centrally located and/or near well-traveled streets/highways and/or public transportation. Do not commit to a space you cannot fill. It is better to have people standing along the walls than to have dozens of empty seats.

Planning a Budget

One of the main topics of conversation at your first organizing meeting should be the budget: who is willing to pay for what and who can make in-kind donations. Remember to look to social service networks, unions, low-income housing and tenant groups, and the community-at-large (banks, large and small businesses, civic groups, and interfaith networks) to seek funding (in-kind or cash) for the event. As committee members place calls to the community to solicit support, they will also be spreading the word about the event.

Here is a checklist of some of the items necessary for the forum that may end up costing you money:

Site: One of the coordinating committee members may have access to an appropriate site that you can get for free or for a nominal charge. Meeting rooms in churches, shelters, soup kitchens, libraries, or local government buildings are a good bet. Perhaps a local school or college will donate space to you. But if none of these are available, you may have to rent private space, such as a movie theater or banquet hall, in which case you might have to pay a fee.

Publicity: You should expect to print at least 1,000 flyers/handbills to publicize the forum. You should expect to spend about five cents a copy. If you do not want to pay for this service, consider making up a master flyer on a computer, distributing master originals to participating groups, and asking them to photocopy them on their in-house machines. If your publicity committee makes up small newspaper ads and radio announcements, send copies of them around to community newspapers and local radio stations. You may be surprised at how much free advertising you can get.

Reception: People will remain to discuss the issues if you present them with a nice spread of food and drink. It is generally not a good idea to serve alcohol (and restrictions on the room you are renting may prevent it). Consider asking every member of your various committees to bring some item of food or drink. Ask local businesses to donate items. You will probably have to pay for things like plates, cups, utensils, and napkins. Consider drawing up a modest budget for these essentials and then splitting the cost among the participating groups.

Educational Materials: Remember, the forum provides you with an excellent opportunity to distribute educational materials to the participants and the audience. You may want to allow each group to handle its own development and production costs or you might consider producing a joint packet of materials, with the production costs borne equally.

Postage and Mailing Costs: Do not spend a lot of money doing large mailings to publicize the forum. We suggest you rely as heavily as possible on free advertising — but do not discourage the desire of individual groups to publicize the forum to their own members. If they choose to do this, however, they should be prepared to pick up the tab.

Remember, weigh financial questions early and avoid unpleasant surprises. Putting on a community forum will take more time and effort than cash, but the participating groups should be prepared to spend some money in order to host a successful forum.

Sample Timeline

Week 1

Full committee holds initial meeting

- Establish tentative date and time for event
- Choose type of person(s) for the panelists/moderator
- Agree on ground rules
- Form subcommittees
- Develop Budget

Week 2

Subcommittees hold first meetings

- *Site Committee:* solicits ideas for place
- *Finance Committee:* develops draft budget and solicits ideas on how to fund event
- *Outreach Committee:* prepares list of all endorsing groups to date and develops list of other groups to ask for endorsement and develops draft flyers/leaflets
- *PR/Media Committee:* drafts news release/public service announcements
- *Candidate Liaison Committee:* Makes first round of calls

Week 3

Subcommittees continue work

- *Site Committee:* visits possible sites and finalizes time, date, site
- *Finance Committee:* begins calls to identified groups
- *Outreach Committee:* begins calls to panelists
- *PR/Media Committee:* finalizes news releases/public service announcements and begins media strategy
- *Candidate Liaison Committee:* continues to contact candidates

Week 4

Full committee meets

- Subcommittees report on progress

Subcommittees continue work

- *Site committee*: finalizes site for event, holds meeting for volunteer recruitment
- *Finance Committee*: continues outreach for funding
- *Outreach Committee*: continues phone calls for advance outreach, confirms panelists/moderator, continues to mail/email out notices to community
- *PR/Media Committee*: sends out PSAs/calendar announcements
- *Candidate Liaison Committee*: meets with staff members

Week 5

Full committee meets

- Subcommittee report on progress-to-date
- Develop evaluation tool and plan for follow up actions

Subcommittees continue work

- *Site Committee*: finalizes all logistical plans
- *Outreach Committee*: develops and prints event program

Week 6

Full committee meets to review final details

Week 7

Hold event

Full committee meets to evaluate event and implement follow-up actions