



## **SCHOOL BOARD CANDIDATE FORUMS AND QUESTIONNAIRES**

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A step-by-step “How To” guide to conducting  
questionnaires and hosting forums

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## **PTAs and School Board Elections**

Each year voters across the state will go to the polls and choose the candidates they feel will best represent them on their local school board. PTAs cannot support or oppose candidates running for school board but under IRS regulations, they can host candidate forums and publish candidate questionnaires. Such forums and questionnaires serve a dual function of informing community members about their choices among candidates and demonstrating the value of PTA.

Provided in the following pages are guides to assist your unit or council in conducting candidate questionnaires and forums. With a little bit of planning your unit or council can demonstrate your leadership in advocacy. If at anytime during the process you find yourself having questions or just need a bit of guidance please contact a member of the Department of Legislation & Advocacy. We are here to help you succeed.

### **Ways PTAs can inform their members**

- Candidate questionnaires are simple and effective ways to inform your membership about the candidates. All candidates must be invited to participate and their answers must be published exactly as they were submitted – no editing or paraphrasing is allowable.
- A candidate forum is simply a platform for candidates running for public office to express their views. There are a few different formats: candidate speeches, panel discussions, and audience question-and-answer sessions. Your PTA can choose to employ one or a combination of these formats for your event. The key is to make sure the forum provides candidates an equal and fair opportunity to express their positions.

### **Dates and Candidate information**

Typically school districts hold their school board elections during the General Municipal Election the first Tuesday of each April. Candidates file their intent to run at their school district office. The dates of the official Election Day, first day for filings and deadline for filing can be found on the Missouri Secretary of State's webpage. Missouri law does exempt school districts from holding school board elections in instances where the number of candidates is equivalent to the number of open seats.

Missouri Secretary of State webpage – [www.sos.mo.gov](http://www.sos.mo.gov)

List of candidates – contact your school district office

## **Candidate Questionnaires**

Just as with planning any event, publishing candidate questionnaires takes some planning. The timeframe from the date to when the questions are sent to the candidates to when they are published needs to allow for appropriate time for the candidates to formulate answers. Remember it is likely your organization will not be the only one soliciting questions of candidates. It is important to clearly describe to the candidates that you are a local PTA unit or council, who the intended audience will be, the deadline for submitted responses, and where the responses will be published. It is also a wise idea to plan on sending a reminder a few days prior to the deadline for submission. It is equally important to inform the candidates that due to your 501(c)(3) status all candidates are invited to participate and the answers submitted will be published exactly how they are received.

### **Publishing mechanism**

Where and how you publish the candidate's responses is up to you. Some possible mechanisms for publication would be your unit or council newsletter, a letter sent home or emailed, posted on the unit or council's website or blog (you could link your social media sites to the publication), or working in conjunction with a local newspaper to publish community wide.

### **Questions**

When narrowing down the list of questions it is important to remember to keep the list to a minimum. Too many questions, especially depending on the number of candidates, and your readers may quickly lose interest. Basic bio information will most likely already be published by local media or made available by the school district. Focus your questionnaire around education issues that are important to your membership and school district. If there is a particular area of concern among parents and teachers make sure to include that in your list of questions. A list of sample questions is included on page 10.

### **Publication Date**

The publishing date should be within a few weeks of the election. It is best to give your audience some lead-time before the election to read over the responses. Since the General Municipal Election takes place the first Tuesday in April your target publishing date might be somewhere around the last couple of weeks in March.

### **Candidate submissions**

The date from when you contact the candidates to the deadline for submitted responses should be no more than 2-3 weeks. This gives the candidates enough time to formulate and return responses but not too much time that the request is placed on the back burner and forgotten. A few days before the deadline send a reminder notice to any candidates who have yet to respond.

## Timeline

The timeline's begin date is restricted to the final day for candidate filing. For the majority of school districts this will occur mid January. Once the deadline has passed contact your school district's main office to receive a list of the candidates and their contact information.

### *Timeline example*

1 <sup>st</sup> date	2 <sup>nd</sup> date	3 <sup>rd</sup> date	4 <sup>th</sup> date	5 <sup>th</sup> date
Collect candidate info	Send request to candidates	Send deadline reminder	Submission deadline	Day of publication

When creating your timeline it is best to work backwards from your publishing date. Once you have determined that date, figure out how much time you will need to format the responses into the publishing mechanism.

## Candidate questionnaire worksheets

### Candidate questionnaire checklist

	Decide what avenue you are going to use to publish responses
	Formulate questions
	Create timeline
	Collect candidate info
	Invite all candidates to participate
	Send deadline reminder
	Formulate response into your publishing mechanism
	Publish the questions and responses

### Dates

- Candidate deadline to file \_\_\_\_\_
- Collect candidate information \_\_\_\_\_
- Invite candidates to participate \_\_\_\_\_
- Submission deadline reminder \_\_\_\_\_
- Submission deadline \_\_\_\_\_
- Date of publication \_\_\_\_\_
- Election Day \_\_\_\_\_

### Timeline

Collect candidate info	Send request to candidates	Send deadline reminder	Submission deadline	Day of publication

## Candidate Forum

Choosing when to hold your Candidate's forum is probably the trickiest part of the planning process. Hosting your forum more than one month prior to the election can result in low turn out and disconnect between the forum and the actual election. You want the candidates fresh in voter's minds when they head to the polls. Since typically school board elections are held the first Tuesday in April, March is the best month to hold a forum. Ideally the date, time and location should be convenient for the majority of your target audience. Calendar dates can fill up quickly so it is best to secure a date and location well in advance. Unless your location charges your unit or council for cancellations, there is no need to wait until the candidates have filed. If you schedule this event early in the school year you'll lessen the chance of other school and PTA conflicts.

Remember, Missouri law does not require an election for school board positions be held when the number of candidates equals the number of open spots. However don't let this fact hold you back from proceeding with the initial planning. It's better to cancel an unneeded forum than be unable to hold one do to limited dates and locations.

### Organizing the forum

- Pick a date, time and location assessable to all.
- Depending on the format you might want to consider offering childcare.
- Does your district have a cable channel? Contact the individual in charge of programming and see if the forum can be recorded and televised. Make sure all the candidates are aware the forum will be recorded.
- Invite all registered Candidates – give them a deadline to RSVP. A sample invitation can be found on page 11.
- Promote the event using a neutral tone. Be sure to emphasize the nonpartisan nature of the event.
- Review the chosen format with the candidates
- Establish ground rules for the distribution of candidates campaign materials. No PTA members attending in their official capacity should hand out any campaign materials.
- Secure a moderator for the event – the moderator can be someone from an outside organization such as the League of Women Voters, a member of your PTA, or even student representatives from the local debate team (it's a great way to involve the students).
- If soliciting questions from the public consider asking for questions to be submitted in advance

## Types of formats

Below are general formats. You can choose to focus on just one type or mix and match. For instance a forum may consist of the following: 2 minutes for each candidate to give an opening speech, 60 minutes of Q&A or panel discussion where each candidate is allotted 2 minutes for answers, and closing speeches by each candidate limited to 2 minutes in length.

- **Candidate speeches** – the candidates are each allotted a specific amount of time to give a speech to the audience
- **Panel discussions** – candidates each are allotted a specific amount of time to weight in their opinion on topics selected to be discussed. Decide in advance what the topic of the discussion will include and be sure to include this in your advertisement. The best topics are those that are currently having the biggest impact on your area. For example in a growing school district the ratio of student to teacher or district expansion may be a hot topic. Pick topics that are timely and relevant.
- **Q&A session** – candidates are allotted a specific amount of time to answer questions poised by the audience. Questions can be submitted by the public or internally generated. A list of sample questions is included on page 10.
- **Meet and greet** – informal event where the candidates are available to meet with the public.

## Conducting the forum

- Provide name plaques for all candidates attending
- If you are allowing candidates to provide campaign materials provide a table or tables for this purpose
- Write/print out any questions received in advance on individual note cards – this will make reading off question easier for the moderator
- Provide note cards and pens/pencils for audience members to submit answer questions – it is acceptable to establish a ground rule that all questions must be submitted by a particular time. For example, all questions must be handed to the moderator 5 minutes prior the start of the event. Be sure to make that clear in your advertisement of the forum.
- Review the format once again with the candidates and the moderator – if time limits are being used decide what method will be utilized to inform candidates during the forum of time. For example for a 2 minute limit the moderator may hold up a sign or knock on the podium at 1 minute remaining, then again at 30 seconds remaining before announcing the candidates time is up.
- Introduce the candidates to the moderator
- Before the forum formally begins inform those in attendance of the format, time limits, and any ground rules.
- Do not ask candidates to publicly endorse any issues. Issues should only be addressed in a Q&A or panel discussion format.
- Upon conclusion of the event thank both the candidates and the public for attending the forum.



## Candidate Forum Worksheets

### Forum checklist

	Secure a location and time for the forum
	Establish format
	Invite all candidates to participate
	Secure a moderator
	Advertise the event
	Send out a reminder to the candidates of the time and location
	Prepare questions or discussion topics
	Notify the location of any special set up needs
	Bring bottled water for candidates and moderator
	Create name placards
	Notecards and pens/pencils

### Dates

- Secure date and location of event \_\_\_\_\_
- Candidate deadline to file \_\_\_\_\_
- Collect candidate information \_\_\_\_\_
- Invite candidates to participate \_\_\_\_\_
- Choose a moderator \_\_\_\_\_
- Advertise event \_\_\_\_\_
- Deadline for pre-submitted questions \_\_\_\_\_
- Reminder to candidates and moderator \_\_\_\_\_
- Forum \_\_\_\_\_
- Election Day \_\_\_\_\_

### Timeline

Secure date/location	Collect candidate info	Send invites to candidates	Contact a moderator	Advertise event	Send reminder to candidate and moderator	Date of forum

## Possible School Board Candidate Questions

Below are questions Missouri PTA has collected over the years. Another great source for questions is your local membership. Find out what questions they would like to see answered.

- What will you do to address the problems schools face with declining funding as they also try to meet the challenges of ever growing enrollments, children with special needs, and new educational technology?
- What specific plans would you recommend to support and improve public schools?
- What specific actions will you take to increase the role of parents in decision making and promote parental involvement in schools?
- If elected, what would you do to address the childhood obesity problem?
- What will you do to help attract highly qualified teachers to our schools?
- Do you believe that art and music are part of a quality education, and if so, what do you plan to do to make sure these programs remain in our schools?
- What is your view on voucher programs that allow parents to use public funds to send their children to private schools?
- What does being a supporter of public education mean to you?
- What do you think is the biggest challenge facing our public schools right now and what is your plan to address it?
- Do all of the teachers in our schools meet the federal government's definition of highly qualified? If not, as a board member, what would you do to address this.
- How are our schools planning to ensure that students graduate with the knowledge and skills they need to be college and career ready?
- In what ways are you reaching out to the business community to build their support for quality public school?
- What kind of community partnerships or activities could support student achievement outside of school?
- What would you do as a board member to ensure that afterschool programs and other activities remain in place for students?
- And finally it might be nice to know if the candidates running are active PTA members.

## Sample Candidate invitation

January xx, 20xx

To: *Registered Candidate*  
*address*  
*City, MO. xxxxx*

RE: School Board Forum

Dear *Registered Candidate*,

As part of our service to the community each year, as needed, the PTA hosts a School Board Forum prior to the election. This year the forum will be held at the *name of the location and time*. This forum is open to the public, moderated by *insert the moderator*, and aired on the district's cable channel. All candidates will have an opportunity for a short 2-minute introduction prior to the question/answer portion of the forum. During the question/answer section each candidate will have approximately 2 minutes to answer questions poised to him or her by the moderator. Once the question/answer portion has concluded candidates will be afforded the opportunity to give a brief 2-minute closing. As a candidate for school board, we would like to invite you to participate in this forum.

The PTA is made up parents, teachers and students in *insert your School District*. Due to the PTA's non-profit 501(c)(3) status PTAs cannot support or oppose candidates for public office, establish political action committees that support candidates, rate candidates in any fashion, conduct research or analysis for a party or candidate, or give membership lists to candidates. However, we can sponsor public forums in which all candidates are invited to participate.

We look forward to having you participate in this event. In order to accommodate all participating candidates we ask you to RSVP no later than *insert your date*.

Thank you,

*Sign your name and enter your contact information*