
A Guide to Organizing Community Forums

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Acknowledgments

Community Catalyst is a national advocacy organization that builds consumer and community participation in the shaping of our health system to ensure quality, affordable health care for all.

Our work is aimed at strengthening the voice of consumers and communities wherever decisions shaping the future of our health system are being made. Community Catalyst strengthens the capacity of state and local consumer advocacy groups to participate in such discussions. The technical assistance we provide includes policy analysis, legal assistance, strategic planning, and community organizing support. Together we're building a network of organizations dedicated to creating a more just and responsive health system.

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A Guide to Organizing Community Forums

USING THIS GUIDE

As anyone involved in consumer advocacy can attest to, a well-planned forum can be a powerful tool to educate and organize community members. Given the potential to raise community awareness of important issues, motivate community members to participate in advocacy efforts, and serve as a point of interaction for those with similar interests, organizers should make every effort to plan the most effective forum possible.

The following information has been compiled to provide individuals and consumer groups with sets of guiding questions to organize more effective community forums. The guiding questions deal with several general concerns that often arise when planning a forum. We are hopeful that this outline enables community forum organizers to anticipate many of these general concerns and, thus, address them efficiently.

Each section includes brief checklists that should prove helpful during the different stages of your forum organizing effort. Also, please note the appendices attached to this guide that list potential barriers to successful forums and solutions, types of groups to target when thinking about the desired forum audience and inviting speakers, and suggestions for low-cost meeting spaces.

*...A well-planned
forum can be a
powerful tool...*

I. The Forum: Purpose, Planning and Personnel

WHY ARE YOU PLANNING THIS EVENT? Identify and articulate the goals of the forum. What do you want to accomplish with the forum (e.g., inform consumers about an important health concern, present an opportunity for consumers to join established community groups, etc.)?

WHAT INFORMATION DO YOU WANT TO COMMUNICATE? What are the essential messages and relevant facts you want the audience to take away from the forum?

WHAT TIME CONSTRAINTS ARE YOU WORKING AGAINST? Be mindful of the time issues and deadlines that might impact your plans (e.g., organizing a forum to educate a group of consumers about a proposed conversion *before* a formal application is filed or *before* the date of scheduled public hearings, scheduling the forum after work hours or on weekends for the convenience of working individuals).

WHAT WILL BE THE FORMAT OF THE FORUM? Will there be a panel discussion? Will the speakers give separate presentations? How much time will speakers have for their presentations? How much time will remain for comments or a question and answer session? Can the forum be made more interactive so that it better engages the target audience?

WHO SHOULD SPONSOR THE FORUM? Does your organization have the resources (e.g., money, personnel, etc.) to put on the forum as planned and do it successfully? If not, should you collaborate with another organization? Would collaborating on the forum with another organization benefit your effort (e.g., broader appeal, higher visibility, more resources, etc.)? Should you modify your original goals or target audience?

WHO WILL BE RESPONSIBLE FOR PERFORMING WHICH TASKS? Be sure everyone involved with the forum understands her/his role and responsibilities (e.g., who will moderate the forum? who will serve as liaison between invited speakers and your organization?) Can you put together a planning committee that includes members of your target audience?

Checklist

- ✓ Keep at least two copies of all planning information.
- ✓ Generate a list of goals you wish to accomplish with the forum.
- ✓ Record all important dates, names, telephone numbers, etc.
- ✓ Form a planning committee that includes members of your target audience.

II. The Audience: Who and How to Reach Them

WHO IS YOUR TARGET AUDIENCE? What groups do you want to communicate with? Identify your targets as specifically as possible (e.g., not just “community members,” but “uninsured people, senior citizens on Medicare, faith-based groups, small business owners, working families,” etc.). Why is it important to reach this particular audience through the forum?

HOW WILL YOU REACH THE MEMBERS OF YOUR TARGET AUDIENCE? Your outreach strategy should be designed to reach your target audience; it may include handing out or posting flyers in the downtown area during rush hour, taking out newspaper and magazine ads, sending e-mails, making phone calls, doing radio spots, arranging for TV news coverage, mailing invitations, etc. Which publicity activities should be done by which dates? Are you working with people who can lead the publicity effort in their own communities?

HOW WILL YOU GET YOUR TARGET AUDIENCE INTERESTED IN YOUR FORUM? Design announcements for your forum that are likely to appeal to members of your target audience and be seen, read, or heard by them. Keep text short and simple, and your layout bold to attract attention. Think about what you need to say to get targeted people interested as well as how, when and where to say it.

WHO IS IN CHARGE OF PUBLICITY? Who will draft or design what? Who has final approval? Who will distribute information how? By what date? Who will answer and return calls for more information?

ARE THERE OTHERS THAT SHOULD ATTEND THE FORUM? If your organization is a member of a larger coalition or partnership, have other member groups been invited? Can you invite key legislators, media, and other potential collaborators to your forum? Given the focus, would it be appropriate to invite potential or present funders?

Checklist

- ✓ Identify your desired target audience and why you are targeting this audience.
- ✓ Outline an outreach strategy – specifically, what modes of publicity you will use, who will design ads, etc.
- ✓ Be sure that all publicity material contains the forum time, date, location, and a contact number for more information.
- ✓ Include information on invited speakers, directions to the forum location, parking availability, and refreshments when available.
- ✓ Designate which individuals will be responsible for which publicity tasks.
- ✓ Keep records of planned publicity activities.
- ✓ Use the forum to network by inviting organizations and individuals to strengthen preexisting relationships and to establish new ones.

III. The Presenters: Inviting and Securing the Speakers

WHO WILL BE INVITED TO SPEAK? Are they recognized experts or noted authors on the topics of interest? Who might be possible substitute speakers if first choices aren't available? How diverse will your panel of speakers be?

ARE THE SPEAKERS APPROPRIATE? Will these speakers appeal to the target audience? Do they have the knowledge and breadth of experience needed given the overall message and purpose of the forum? Do they include members of the community that the desired target audience is part of?

WHO WILL BE RESPONSIBLE FOR MAKING WHICH ARRANGEMENTS WITH SPEAKERS? Who will contact speakers? Who will approve the speaker list? Who will gather information from speakers (e.g., handouts that need to be copied, biographical information for program, audiovisual needs, etc.)? Who will make transportation or lodging arrangements for speakers?

ARE SPEAKERS FAMILIAR WITH THE OVERALL STRUCTURE OF THE FORUM? Have you shared a draft of the agenda with the speakers? Are speakers comfortable with the expected order of the presentations and estimated time allotments for each? Have you discussed the content of their remarks with them to be sure they will cover the points of importance?

WHAT ARE THE NEEDS OF SPEAKERS? Will any require transportation or lodging? Who will pay? Are speakers clear about which costs your organization will cover and which it will not? Will speakers need to use audiovisual equipment (e.g., overhead or slide projectors, video players, etc.)? Who will provide these?

Checklist

- ✓ Specify who is responsible for tasks related to securing forum speakers and making other arrangements.
- ✓ Identify speakers appropriate for your intended audience and forum goals.
- ✓ Invite and get commitments from speakers.
- ✓ Be certain speaker understands what fees will be paid by forum sponsor.
- ✓ Provide speakers with a draft of the agenda, and other relevant information.

IV. Miscellaneous: The Meeting Space and Other Concerns

WHERE WILL THE FORUM BE HELD?

- ⇒ Are there meeting spaces available that might be low-cost or free of charge (e.g., community centers, school auditoriums/cafeterias, etc.)?
- ⇒ Who's in charge of finding and reserving meeting space?
- ⇒ What's the seating capacity and what is your projected need?
- ⇒ Is the meeting space convenient for the target audience to get to? What options are available for traveling to and from the meeting space (e.g., public transportation, shuttle, cabs, parking availability for cars)?
- ⇒ Who will visit and inspect the meeting space before reserving it?
- ⇒ Who will serve as liaison with the owner/renter of the meeting space?
- ⇒ Will there be any set-up required (e.g., of folding chairs or audiovisual equipment) on the day of the forum? Who will do this?
- ⇒ As appropriate, ask about the availability and condition of heating, air conditioning, sound system, lighting, parking space, restrooms, electrical outlets, audiovisual equipment, elevators, facilities manager, security, etc.

WHAT WILL BE PROVIDED TO THE FORUM ATTENDEES?

- ⇒ Will there be a sign-in sheet/guest book (for names, mailing addresses, telephone numbers and e-mail addresses of attendees)?
- ⇒ Will there be nametags and markers for the attendees?

Checklist

- ✓ Be clear about who is in charge of booking appropriate meeting space, producing handouts, arranging for refreshments, maintaining costs, and authorizing payments.
- ✓ Visit and inspect the meeting space.
- ✓ Ask questions about the meeting space—e.g., transportation options, parking space, elevators, wheelchair-accessible ramps, area safety, etc.
- ✓ Inquire into the availability of audiovisual equipment, screens, heating, air conditioning, electrical outlets, lighting and sound systems, etc.
- ✓ Make cost projections.
- ✓ Consult with partners about possible collaboration, volunteering staff, or other resources, and funding opportunities.
- ✓ Consider ways to decrease forum costs.
- ✓ Calculate your available funding and stay updated on actual charges/payments.

- ⇒ Will there be brief feedback forms for audience members to write comments/suggestions on and return before leaving the forum?
- ⇒ Has the agenda been ordered in a strategic way that will allow the forum to flow smoothly (e.g., given the subjects of their presentations, which speakers should follow other speakers)?
- ⇒ Will there be information packets or other handouts available at the forum in addition to the agenda?
- ⇒ Who will be in charge of preparing (e.g., designing, copying, collating) these materials? How will they be distributed (e.g., placed on seats, arranged on a table, handed out)?
- ⇒ Will you require the services of a sign language interpreter or translator?
- ⇒ Will there be time for attendees to ask questions of the speakers?
- ⇒ Will you need to provide a microphone (e.g., free standing or hand-held and passed around) for attendees who wish to ask questions?
- ⇒ Will refreshments be provided? Bought and brought? Catered?
- ⇒ Who will be responsible for the food and drink arrangements?

HOW MUCH WILL THE FORUM COST?

- ⇒ How much can your organization spend on the forum?
- ⇒ Can you collaborate with partners and share costs?
- ⇒ What funding sources might be available (e.g., grants or donations)?
- ⇒ What costs might be speaker-related (e.g., honoraria, travel, lodging)?
- ⇒ What costs might be publicity-related (e.g., design, copying, etc.)?
- ⇒ What other costs might be anticipated (e.g., meeting space rental, audiovisual equipment, refreshments, etc.)?
- ⇒ Are there ways to decrease costs (e.g., holding forum in a free community space, inviting speakers who will speak for free,

...Supply information packets at the forum in addition to the agenda...

...Decide who will be in charge of designing, copying, and collating materials?...

...Should information packets be distributed on seats, arranged on a table, or handed out?...

soliciting donations from community businesses, requesting help from volunteer groups, etc.)?

- ⇒ Who is responsible for keeping track of forum costs? Who is responsible for authorizing payments? Is this the same individual? If not, are these two individuals communicating and in agreement on available forum funds?
- ⇒ Which charges will need to be paid up front and require presently available funding (e.g., meeting space deposits, food costs)? Which payments can be made at a later date (e.g., speaker reimbursements)?

V. The Day of the Forum: Responsibilities

Be sure that everyone involved with organizing the forum is clear about who is responsible for the following important tasks:

- ⇒ Unlocking meeting space
- ⇒ Arranging seating
- ⇒ Connecting audiovisual equipment
- ⇒ Delivering and setting up refreshments
- ⇒ Posting signs at site giving location of and directions to meeting place
- ⇒ Attending to the attendees
- ⇒ Attending to the speakers
- ⇒ Handing out or making information packets/sheets available
- ⇒ Emceeing forum
- ⇒ Operating audiovisual equipment, lights, sound, thermostat
- ⇒ Keeping track of presentation times
- ⇒ Picking up the sign-in sheets and feedback forms
- ⇒ Tracking attendance by counting the number of attendees
- ⇒ Recording the forum
- ⇒ Cleaning and locking meeting space when forum is over

Appendix A: Potential Barriers to a Successful Community Forum and Suggested Solutions

BARRIER #1:

BAD FORUM LOCATION

- ⇒ Visit and inspect the meeting space before you reserve it.
- ⇒ Ask questions about the facility and surrounding neighborhood.
- ⇒ Pick a meeting space that is convenient for your target audience to get to (e.g., near public transportation, with available parking space, wheelchair-accessible).
- ⇒ Find a meeting space that is well known to your target audience (e.g., a community center or neighborhood school, space in a popular downtown area).
- ⇒ Choose a meeting space in an accessible, safe, well-lit area.
- ⇒ Work with members of your target audience to determine what might be an appropriate meeting space.

BARRIER #2:

LACK OF AWARENESS AMONG TARGET AUDIENCE ABOUT FORUM

- ⇒ Identify your target audiences as specifically as possible.
- ⇒ Outline publicity strategies tailored specifically to your identified target audiences.
- ⇒ Have community members do outreach in their own communities.
- ⇒ Begin publicizing your forum early enough to allow interested individuals time to call for more information and make arrangements in their schedules to attend.
- ⇒ Publicize using media appropriate for your target audience (e.g., radio programs and newspapers geared to your target audience, flyer distribution near workplaces and stores in targeted communities).

**BARRIER #3:
LACK OF UNDERSTANDING/
COMMUNICATION OF
IMPORTANCE OF FORUM**

- ⇒ Provide background information relevant to your target audience in promotional materials.
- ⇒ Make promotional materials clear (e.g., use common words when possible) and concise (e.g., limit the length of written ads to one page).
- ⇒ Include contact number with promotional information that individuals can call to ask questions about the forum.
- ⇒ In promotional materials and when responding to information requests, be clear why it is important for the target audience to attend the forum.
- ⇒ Consult with members of the target audience when developing publicity strategy and promotional materials.

**BARRIER #4:
TARGET AUDIENCE DOES NOT
IDENTIFY WITH SPEAKER/ISSUES**

- ⇒ Create promotional materials to appeal to your target audience.
- ⇒ Include actual members of target audience in publicity development.
- ⇒ Gather data about target audience interest in forum topic (e.g., focus groups, street polls, surveys).
- ⇒ Invite speakers known to and respected by your target audience.
- ⇒ Choose speakers who are members of your target audience.
- ⇒ Provide contact number that individuals can call to ask questions.

**BARRIER #5:
FORUM SCHEDULING CONFLICTS**

- ⇒ Consult with and listen to members of your target audience before scheduling the forum.
- ⇒ Include members of the target audience when planning date and

*...Be clear why it's
important for the
target audience to
attend the forum...*

*...Consult with
members of the target
audience to develop
a publicity strategy...*

time of the forum.

- ⇒ Be aware of other events happening in the area around the proposed date and time of your forum. Avoid dates (e.g., weeks of religious observance) and times (e.g., work hours) that might be problematic for members of your target audience.

Appendix B: Groups to Target for Audience Members and Forum Speakers

- ⇒ Employees and their unions
- ⇒ Church groups and religious/faith-based organizations
- ⇒ Local affiliates of national organizations (e.g., AARP, NAACP, YWCA)
- ⇒ Community action and consumer advocacy groups
- ⇒ Grassroots groups working in low-income communities
- ⇒ Agencies focusing on children and families
- ⇒ Senior advocacy groups
- ⇒ Medicaid and Medicare beneficiaries and their advocates
- ⇒ Health services and health reform advocates
- ⇒ Groups representing people of color
- ⇒ Housing and homeless coalitions
- ⇒ University-based health law and health care justice advocates
- ⇒ Parents of children with special needs
- ⇒ Representatives and employees of local health clinics/hospitals
- ⇒ Clients of community health centers
- ⇒ Recognized community/neighborhood leaders
- ⇒ Primary care associations
- ⇒ Foundations (especially community foundations and health philanthropies)
- ⇒ Disability rights organizations
- ⇒ Hospital and medical associations

Appendix C: Suggestions for Low-Cost/Free Meeting Space

Consider inquiring into the availability of these and other lower cost meeting space options when organizing your community forum:

- ⇒ Community college or local school auditorium
- ⇒ Classroom or lecture hall space in local school
- ⇒ Donated space in local store or office building
- ⇒ Neighborhood activities/community center
- ⇒ Meeting room in local apartment building
- ⇒ Hospital, community health center or health clinic space
- ⇒ Cafeteria space in local office building or school
- ⇒ Space in a local church or synagogue
- ⇒ Available outdoor space, if the weather permits (e.g., empty parking lot, covered gazebo areas, public garden area, etc.)
- ⇒ Space in individual homes (for smaller forums)