

★ TEXAS IMPACT

PEOPLE OF FAITH WORKING FOR JUSTICE

A HOW-TO GUIDE FOR FACILITATING CONGREGATION-BASED **ISSUE FORUMS**



★ TABLE OF CONTENTS ★

Guide at a Glance, pg. 3

Facilitating Issue Forums in Your Faith Community, pg. 4

- Know the Law: IRS Guidelines for Holding an Issue Forum, pg. 4
- Getting Started on Your Forum, pg. 5
- Selecting Compelling Issues, pg. 5
- Finding Co-Sponsors for Your Forum, pg. 6
- Defining Co-Sponsors' Duties, pg. 6
- Maximizing Turnout, pg. 7

3 Basic Issue Forum Models, pg. 8

- Model 1: One Main Speaker with Respondents, pg. 8
- Model 2: Panel of Experts with Moderator, pg., 8
- Model 3: Multi-Session Series of Presentations, pg. 9

Sample Issue Forum Template, pg. 9

- Brief Forum Description, pg. 9
- Issue Forum Outline, pg. 10
- Do's and Don'ts for Issue Forums, pg. 11
- Quick Forum To-Do List, pg. 12

Election Activity Report Form, pg. 13

GUIDE AT A GLANCE

This resource will help you do the following as you plan a congregation-based issue forum ahead of an election:

- Choose a public policy issue you think your congregation or community needs to learn more about and discuss
- Form an event committee
- Choose a venue and date
- Invite co-sponsors to participate
- Invite speakers and make other event arrangements
- Promote your event
- Host and manage the forum
- Plan for and execute followup with attendees and participants



Texas Faith  **otes**

This resource is part of Texas Impact's Texas Faith Votes program, which equips faith groups across our state to mobilize their communities during elections.

Voting is at the core of civic participation, and Texas Impact encourages people of ALL faiths and creeds to participate in ALL elections. In recent legislative sessions, our Texas government has made major changes to Texas election laws. These laws could make it harder for some eligible Texans to vote, and they could make it harder or scarier for some Texans to volunteer to work the polls. It's more important than ever to be an election mobilizer—casting your own vote is vital, and helping others effectively participate in our democracy is imperative.



FACILITATING ISSUE FORUMS IN YOUR FAITH COMMUNITY



In the early years of our democracy, houses of worship were primary gathering places where local communities met to discuss issues affecting the community and the nation. Today more than ever, people of faith can and should participate in the public discourse on current issues. An issue forum is an opportunity to convene in your house of worship to deliberate issues, problems, and potential solutions within your faith community.

Public policy issues are often highly complex. They involve detailed factual information and thorough understanding of varied perspectives. An issue forum provides a way to learn about difficult issues in a safe environment.

Engaged and educated citizens can advocate and impact policy more effectively within the community. Issue forums provide a solid foundation for political action and understanding.

AN ISSUE FORUM IS...

1. A safe space to learn about difficult and intractable social issues.
2. A way to relate policy issues to religious social teachings in a way that wouldn't usually happen at a secular community event.
3. A way to bring the community together.
4. An avenue to give local experts and elected officials an audience.
5. Excellent preparation for an election or a legislative session.

So you want to plan an issue forum? Texas Impact can be a resource to you and your planning team as you move forward. This handout presents some ideas to get you started.

KNOW THE LAW: IRS GUIDELINES FOR HOLDING AN ISSUE FORUM

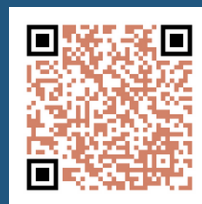
Issue forums are opportunities for members of your congregation and community to come together and learn about ideas. Candidate forums are opportunities to learn about people—specifically, candidates for office.

Any religious group is, by law, allowed to hold an issue forum. Here are some important guidelines for faith communities engaging in citizenship-building activities:

- Your forum **MUST** be nonpartisan. If there is more than one elected official speaking, they can't all be from the same party, and there can't be any references to any party platform during the event.
- Although congregations are allowed to engage in limited lobbying, to be on the safe side, the forum should not promote a "lobby" message. This means no handouts, signs or instructions to the audience to "ask your elected official to vote yes (or no) on a particular bill".
- The moderator should not comment on the opinions of the panelists.

HAVE QUESTIONS ABOUT WHAT YOU SHOULD AND SHOULDN'T DO AS A 501(C)(3) RELIGIOUS ORGANIZATION HOSTING AN ISSUE OR CANDIDATE FORUM?

Check out Texas Impact's resource [Politics and the Pulpit: A Guide to Rules and Regulations on Political Activity by Religious Organizations](#).



Scan to download the Politics and the Pulpit resource



GETTING STARTED ON YOUR FORUM



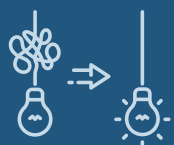
Start discussing ideas for potential issue forum topics with members of your congregation. Members of social action committees and Sunday School classes are a great place to find interested people. Start identifying individuals who can take part in the planning team for your forum. Organize a core team to start brainstorming some issues you would like to cover.



Once you have some ideas as well as support, talk to your pastor about your intentions and share your ideas with him or her. With his or her input, set a date. Your pastor can be a great resource as you plan your event, so keep communication open. Once you have a date and a topic, your pastor can publicize the forum from the pulpit several weeks in advance of the event.

SELECTING COMPELLING ISSUES

An ideal congregation-based issue forum addresses:



- a current public policy issue
- of broad religious social concern about which there is some level of controversy or difference of opinion
- that could have a variety of possible policy solutions

CURRENT ISSUES

Current issues include topics that are in the news and/or that the Legislature is considering.

It's important to make your forum topic broad enough, but not too broad, to allow for rich discussion. For example, "Healthcare in Texas" would be too broad a topic—"The Crisis in Access to Healthcare for Children in Texas" or "The Growing Need for Home Healthcare for Seniors in Texas" would be two of many possible ways to refine the topic.

BROAD RELIGIOUS SOCIAL CONCERN

A congregation-based forum should address a concern that is of religious concern, not just of concern to individuals who happen also to be members of religious communities.

For example, highway construction or gas prices would be current issues that the Legislature might address, but they have tenuous connections to religious social concerns.

Sometimes, a congregation might choose to address the religious social concern aspects of an otherwise secular issue: for instance, you might decide to hold a forum on the particular impact of a proposed highway on an economically disadvantaged area in your community.

SOME LEVEL OF CONTROVERSY

If everyone in your community agrees about the issue you choose as your forum topic, there won't be much to discuss at your forum. If you believe that it's important to hold an event about the issue even though it isn't controversial, consider holding an "informational meeting" instead of a forum.

VARIETY OF POLICY ALTERNATIVES

If there is only one possible way to address the policy issue you've chosen as your forum topic, the audience will be frustrated and the forum won't yield much productive discussion. However, it is almost never the case that an issue only has one possible solution.

Often, policymakers prefer to present issues to the public as though there were only one solution because it makes their jobs easier or it helps them enact the solution they prefer. If, in your planning process, it begins to appear that your issue has only one possible solution (eg: raise taxes), consider changing the way you and others are "framing" the issue.

FINDING CO-SPONSORS FOR YOUR FORUM

There are four kinds of organizations that your congregation should consider asking to co-sponsor your issue forum (or other events, for that matter):

PEERS

Other local congregations in your area. Consider setting a goal of having some degree of religious diversity in your co-sponsors.

VERTICAL TEAMS

Groups that your congregation relates to on a regional, state, or national level such as your district, cluster, or judicatory.

COLLEAGUES

Groups you work with locally that are not congregations, such as your local ministerial alliance or a charity you partner with in the community.

FRIENDS

Groups your congregation belongs to or makes common cause with at the state or local level such as Texas Impact, Church Women United, and more.

DEFINING CO-SPONSORS' DUTIES

Co-sponsors may want to be very involved in planning the forum and may want to assign a member to the event committee. In most cases, however, other groups will be just as happy to help you promote your event while leaving the "heavy lifting" to the event committee.

It's up to you to define the responsibilities of your co-sponsors. At a minimum, co-sponsorship means promoting the event, especially to the co-sponsor's constituency in the most effect way.

For instance, if your judicatory co-sponsors your event, make sure they send notices about the event to both the whole judicatory and to any sub-judicatory email lists they might have such as “clergy” or “social action chairs.”

If there will be costs associated with your forum like facility rental, refreshments or printing, you could ask co-sponsors to contribute to the costs. Alternatively, you could divide responsibilities so each co-sponsor assumes one cost.

RELIGIOUS OR NOT RELIGIOUS?

Texas Impact advises congregations to limit their co-sponsors to organizations that either are specifically religious, such as other congregations or local ecumenical partnerships, or interact with the religious community in an ongoing way such as a local nonprofit clinic.

Opening co-sponsorship to secular interest groups usually either dilutes the religious particularity of the forum, so that it becomes less connected to religious social concern and more connected to the interest groups represented, or else makes the secular groups uncomfortable. However, you should definitely promote your forum to secular groups and make sure they and their members know they are welcome to attend.

MAXIMIZING TURNOUT

MAKE SURE THE TITLE DOESN'T SOUND LIKE YOU ALREADY HAVE THE SOLUTION OR LIKE YOU ARE PROMOTING A PARTICULAR AGENDA.

MAKE SURE IT'S CLEAR FROM THE TITLE AND DESCRIPTION THAT YOU ARE ADDRESSING AN URGENT—OR AT LEAST TIMELY—TOPIC.

MAKE SURE TO DEVELOP A LONG AND A SHORT DESCRIPTION OF THE FORUM VERY EARLY.

Use those two descriptions consistently everywhere you promote the forum so the public sees the language repeated many times.

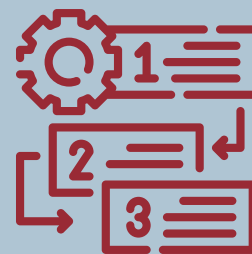
TRY REALLY HARD TO GET THE PROMOTIONAL INFORMATION TO LOCAL CONGREGATIONS AND NEWS OUTLETS IN TIME FOR AT LEAST TWO NEWS CYCLES

That means, if your congregation has a monthly newsletter, you should try to get the information to your editor in time to have the announcement appear in two successive editions before the event.

TRY REALLY HARD TO GET A LOT OF OTHER CONGREGATIONS AND ORGANIZATIONS TO BE CO-SPONSORS AND PROMOTE THE EVENT TO THEIR MEMBERS.



3 BASIC ISSUE FORUM MODELS



MODEL 1: ONE MAIN SPEAKER WITH RESPONDENTS

In this model, ask one primary speaker to explain the policy issue and lay out possible solutions to it. Then a panel of 3-5 respondents takes turns commenting on the primary speaker's information. The audience can ask questions of either just the primary speaker or both the primary speaker and all the respondents.

KEYS



- Make sure the primary speaker really has the knowledge to deliver all the information they need to, and make sure they are an entertaining speaker!
- Make sure the respondent panel includes a good balance. In particular, make sure the respondents include individuals from a different political party than the main speaker and individuals who have specific professional knowledge on the topic at hand.

PROS

If you have access to a really good primary speaker, this is the easiest forum to put together.

CONS

Because the respondents are commenting on what they've just heard the main speaker say, you don't have as much control over the points they plan to make.

MODEL 2: PANEL OF EXPERTS WITH MODERATOR

In this model, a panel of 2-4 experts lay out the issue as well as offer a range of solutions. Make sure this panel is politically diverse and has differing perspectives on the topics at hand. A moderator introduces the event and helps place the issue in context, both in terms of religious social concern and timeliness.

KEYS



- All the experts need to be of equal gravitas—it's probably not fair to have a senator, a hospital CEO and a convenience store clerk (although of course it would depend on the clerk!)
- Unlike with the panel of respondents in the "primary speaker" model, each of the panelists in this model should be an expert on the policy issue and an expert in the range of solutions.
- At least a couple of the panelists and/or the moderator need to be well-known enough to draw a crowd.

PROS

There's less pressure for any one speaker to be really engaging or a "one-man band."

CONS

If one of your experts falls through at the last minute, your panel can become seriously unbalanced. It's best to have a couple of back-ups in mind.

MODEL 3: MULTI-SESSION SERIES OF PRESENTATIONS

In this model, the forum is expanded to take up more than one session. Each session features a speaker with expertise on a particular aspect of the policy issue who may or may not have any ideas about possible solutions. Typically the final session features either a speaker who can discuss possible solutions, or else is a pure discussion session in which the audience suggests and evaluates possible solutions with a moderator.

KEYS



- It's imperative that each of the speakers be an expert in a different aspect of the issue—if the sessions get repetitive, the audience will stop attending.
- Scheduling is especially important for this model, because you don't want to run into a conflict part-way through the series.
- The planning committee must maintain ownership of the series from beginning to end.

PROS

This model gives you the best opportunity to examine all the angles of the issue. Also, this model builds community because the audience gets to know each other over the course of several sessions.

CONS

It's harder for people to commit to multiple sessions, so the audience may be smaller.

SAMPLE ISSUE FORUM TEMPLATE

BRIEF FORUM DESCRIPTION

Resurrection Baptist Church in Centerville, in collaboration with First United Methodist Church, will host a multi-week series of forums on healthcare issues in Texas. Throughout four convenings, participants will learn about health care costs, the uninsured, challenges in our local health care system, and policy alternatives for addressing health care issues. Faith communities will deepen their relationships with local health care leaders and providers who serve as expert speakers.

ISSUE FORUM OUTLINE

WEEK 1: OVERVIEW OF THE HEALTHCARE FINANCE SYSTEM

POTENTIAL SPEAKERS

- local hospital district or public hospital CEO or CFO
- local university or community college professor with expertise in health care economy
- chamber of commerce speaker's bureau
- legislator

POTENTIAL DISCUSSION TOPICS

- the healthcare system in your local area
- local healthcare costs
- public finance pressures from and on the local healthcare system
- socioeconomic information about your local area
- notable changes or patterns in your local healthcare system or healthcare economy

WEEK 2: THE UNINSURED

POTENTIAL SPEAKERS

- doctor or caseworker from local clinic for uninsured people
- health care advocate from a local nonprofit
- an uninsured person

POTENTIAL DISCUSSION TOPICS

- numbers and characteristics of the uninsured in your community
- costs to the healthcare system of the uninsured
- local programs to serve the uninsured
- cost estimates of uninsurance for individuals and the community
- cost estimates of insuring the currently uninsured

Optional field trip: visit a local public clinic that receives support from the local religious community

WEEK 3: POLICY OPTIONS IN HEALTHCARE

POTENTIAL SPEAKERS

- advocates for different policy initiatives
- interest group spokespeople from groups such as AARP, local medical association, disability advocacy group, children's services advocacy group or local public clinics

POTENTIAL DISCUSSION TOPICS

- their groups' positions with respect to various healthcare reform ideas
- the pros and cons of different reform ideas

WEEK 4: DRAWING OUR OWN CONCLUSIONS

FORMAT

Moderated discussion/Q&A about the communities concerns and priorities related to the local healthcare system. The facilitator could be the same individual who moderated the rest of the series, or a trained facilitator.

POTENTIAL DISCUSSION TOPICS

- most helpful information from the series
- changes in individual participants' perceptions about any aspect of the healthcare system

DO'S AND DON'TS FOR ISSUE FORUMS

DO...

- Invite agency staff, elected officials, and private sector experts to participate in the discussion.
- Schedule the forum around election cycles and legislative sessions. You also may want to consider capitalizing on important days when we are already thinking about democracy-- Memorial Day, Labor Day, Independence Day or Martin Luther King Day.
- Explain to secular panelists the nature of your event-- a religious community coming together to discuss important issues.
- Consider opening your forum to other groups. Invite neighboring congregations or churches in your denomination from other parts of town. Consider promoting your forum to the larger community as well as secular groups. Remember, there is strength in numbers and many views enhance the discussion.
- Consider taking questions from the congregation prior to the forum.
- Have an independent, neutral moderator.

DON'T...

- Schedule the forum on a date when turnout could be low. Be sure to avoid religious holidays.
- Affiliate the forum with a partisan agenda.
- Influence the direction of the discussion by asking for agreement of panelists.
- Limit your discussion to congregation members.

Interested in hosting a forum about an issue that Texas Impact addresses?

LET US KNOW!

We are happy to share informational resources, contacts, pointers, and more to support your effort. Our policy priorities include:



SCAN FOR OUR
2023-24
LEGISLATIVE
PRIORITIES



QUICK FORUM TO-DO LIST

3 MONTHS IN ADVANCE

- ☐ Invite panelists and brief them on the purpose and goals of the forum
- ☐ Create a communications plan

1 MONTH IN ADVANCE

- ☐ Confirm panelists and share any relevant guidelines, questions, etc.
- ☐ Confirm site arrangements
- ☐ Confirm volunteers
- ☐ Confirm moderator

DAY OF FORUM

- ☐ Complete set-up
- ☐ Review discussion flow and timeline
- ☐ Staff sign-in table
- ☐ Host informal mingling time after the official program

4 MONTHS IN ADVANCE

- ☐ Identify other organizations as co-sponsors
- ☐ Set the date, time, and place for the forum
- ☐ Decide on a forum format
- ☐ Determine issue of focus
- ☐ Develop a budget

2 MONTHS IN ADVANCE

- ☐ Create and start implementing a plan for garnering turnout (including media placements and publicity)
- ☐ Begin volunteer recruitment
- ☐ Select a moderator
- ☐ Continue follow up with panelists

2-3 WEEKS IN ADVANCE

- ☐ Build the audience! Keep recruiting attendees
- ☐ Confirm various volunteer duties
- ☐ Ramp up communications
- ☐ Finalize logistics

1 WEEK POST FORUM

- ☐ Send thank-yous to panelists, moderator, co-sponsors, and volunteers
- ☐ Follow up with your audience and partners by sending coverage and highlights from the forum

The information you collect about the reach of your congregation's voter engagement efforts will help you plan future initiatives and help Texas Impact understand the scope of the faith-based voter engagement work conducted by congregations utilizing our resources!

Please complete Texas Impact's
Elections Activity Report Form
to ensure that your vital voter engagement efforts are factored into the collective faith-based voter engagement work that's underway across our state.

**SCAN THE CODE TO
ACCESS THE FORM!**



Or visit <https://www.surveymonkey.com/r/TFVvoteractivity>



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