



PLANNING AND HOSTING STRATEGIES

In this section, you will learn the “nuts and bolts” of planning and executing your town hall. From finding partners to help share in the event workload, to doing the post-town hall follow-up work that will lay the groundwork for next year’s not-to-be-missed town hall.

Ultimately, organizing a town hall event is an opportunity to recruit additional partners in the First 5 mission, and to create — through your event participants — an engaged and committed constituency to help carry forward the town hall Calls to Action in your future collective work.

Hosting Strategies

There are many different ways to plan and host your town hall. The good news is you don’t have to do it alone. Here are a variety of ways to share the workload.

Finding a partner/co-host

Form an alliance and share the workload

A partner is an individual or organization that wishes to co-host the event and share in the responsibilities for planning, promotion, and implementation. A partner is different from a sponsor, which primarily contributes funding in return for access or exposure to your participants and guests.

Potential partners/co-hosts can provide additional staffing, expertise, and resources to make your event a success. Working with a partner often has several advantages. The extra hands will help divide the work, and each organization can tap into its network to help with event promotion. In addition, partners can bring an additional level of credibility to the event, which can draw more policymakers, experts, and guests.

Finding the best fit

When brainstorming potential partners to help co-host a shared event, think broadly and strategically, and think about the ultimate partnership you could develop that goes beyond the town hall event itself. Think about this event as an opportunity to form alliances with additional partners to support the First 5 mission. Brainstorming potential partners doesn’t have to be hard or complex either. Use this opportunity to capitalize on who you know and who you have established relationships with. This is the perfect time to call upon them, to strengthen that relationship, and to offer to do meaningful work together.

An important consideration in planning and finding partners for your town hall is your target location. For example, target locations could be within Congressional, State Senate and/or Assembly, County or City districts. Both local- and state-level organizations that are well known or connected to the target location should be considered as potential partners.



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CHECK
IT OUT!

Consider individuals and organizations that:

Support your mission:

- 👉 Are like-minded in their mission, and share common values, interests, and goals
- 👉 Have an existing connection or relationship with First 5, such as larger grantee-partners and vendors
- 👉 Have a strong interest in being aligned with First 5 and the issues to be discussed that could lead to a long-term alliance in your work and on the issues
- 👉 Have a vested interest in reaching the participants (such as policymakers) and audience expected to attend the event

Have special expertise and resources:

- 👉 Have potential resources to bring to the partnership, such as staff time, an event location, a network of potential guests, key relationships with policymakers, etc.
- 👉 Have prior experience with hosting community town halls and other events

Are well connected:

- 👉 Have connections and work closely with policymakers locally or in Sacramento
- 👉 Are influential and credible in your community regardless of mission. For example, in smaller communities, the county farm bureau may be among the most influential conveners

To aid in the brainstorming process, see our Sample Partner/Guest List in the “Participants” section for a list of suggested organizations that could serve as potential partners/co-hosts.

CHECK
IT OUT!

Co-host with other First 5 county commissions

One way to maximize resources and expand the event’s reach is to partner with neighboring First 5 county commissions to host a regionally focused town hall. Not only can each contribute its own ideas, strengths, connections, and resources to making the event a success, partnering also can be an opportunity to showcase aligned multi-county or regional policy agendas.



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Getting partners on board

Reach out to potential partners early in the planning process so they can be involved in shaping the town hall. Start with the attitude of “I have an opportunity for you to make a difference,” rather than “We need your help.” Focus on how the potential partner will benefit from participation.

Prepare a draft outline of the event (including potential issues, panelists/policymakers, presenters, and guests), but be prepared to be flexible to allow input by your potential partner.

Show potential partners the connection between First 5 and their organization or interests:

- ✎ With some partners, the direct link is fairly obvious, for example:
Your County Office of Education will likely see the alignment between their mission and the need for children to have access to quality early learning and community supports so they enter transitional kindergarten (TK) or kindergarten (K) ready to learn.
- ✎ For more non-traditional partners, you may need to be more direct, for example:
You might have to use return on investment research to demonstrate to your chamber of commerce the connection between investing in early education and having a qualified workforce that can meet future local business and community needs.

Join an existing event

Instead of hosting a stand-alone event (with or without a partner/co-host), find existing workshops, meetings, or events to host a discussion about First 5 topics. One advantage to this approach is that you’ve got a ready-made co-host, as well as an established event/venue and audience. A disadvantage is that you give up some control over how the town hall is structured, the issues discussed, and the policymakers included. Here are some things to consider:

- ✎ Look for an existing policy or legislative event where First 5 issues could be discussed by policymakers. For example, does your community host a “State of the City” or “State of the County” event? Are there existing awards functions that honor those working to improve the lives of young children that might be a good fit?
- ✎ Consider inquiring with your local government if young children and families can be the subject of a special workshop held by a City Council or County Board of Supervisors.

An added bonus is that these meetings may be webcast or broadcast on public access television, expanding the audience even further.

F5 TIP:

Consider alternate ways potential partners can be involved

Even if an individual or organization isn’t able to commit the time and effort to co-host this year, there are other ways they can be involved.

For example, they could be an event sponsor by covering costs or providing in-kind support for facility rentals, interpreters, event materials, advertising, or other expenses. In return, you can offer exposure for their organization through a thank-you announcement and signage at the event (banner or podium sign), promotional materials (invitation, e-blasts, press releases, and advertising), or other avenues.

Potential partners also should be invited as guests so they experience the town hall’s success first-hand and are compelled to partner with you next year.



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Planning Your Town Hall: Key Steps

Form a planning team

Work with your partners/co-hosts to form a planning team. Together, you can select a project manager to oversee planning and budgeting, and then figure out who will be in charge of the major areas of responsibility, such as:

- ✎ Securing participants (including policymakers, expert presenters, and the moderator) and building an agenda
- ✎ Managing event logistics such as finding a site, contracting for the room or audio/visual services, room set up, and day-of staffing
- ✎ Conducting outreach to your guests (the individuals and organizations interested in or who have a stake in your issues) and tracking guest RSVPs
- ✎ Promoting the event, including general promotion (such as listserv e-blasts and website posts), social media and traditional media outreach, and advertising

Identify a timeframe

The upcoming election in November 2016 provides an ideal opportunity to make First 5 issues a focal point in your community. Events are envisioned to take place in September or October this year in the lead up before the election. In general, town hall events are best held on a weekday evening (Monday through Thursday), avoiding holidays and dates when other popular community functions are scheduled.

We recommend identifying several potential dates and times, and then checking dates with your most critical participants — policymakers, in particular — before setting a final date for the event.

F5 TIP:

Recruit interns for help

Utilize the help of reliable, trusted interns wherever you can throughout the planning process in order to minimize other staff's time spent on the details. Planning an event like this can be a valuable experience for their future work! If you appoint an intern or interns to any of the above responsibilities, make sure to schedule regular check-in points to keep the event planning on track and running smoothly.





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Scheduling your event

Identify several potential dates and times for your town hall to offer to panelists to maximize the chance they can fit the event into their schedules. Review City, County, State Legislative, and Congressional calendars to help set your event date. To ensure maximum participation by policymakers at each level, avoid weeknights where these bodies have scheduled meetings.



CHECK IT OUT!

LOCAL: Weeknight evenings or Saturdays are likely your best days to attract local elected officials, business representatives and other partners, and parents.

STATE: [Click here to see the State Legislative calendar.](#)

The State Legislature's 2016 fall recess runs from September 1 until December 5, 2016. If your event falls during the State Legislative session, Thursday and Friday evenings are best for State Legislators.

If your goal is to influence the California budget, then plan your town hall for March through May 2017.

FEDERAL: [Click here to see the Congressional calendar.](#)

Congress will be on their 2016 fall recess from October 3 until November 14, 2016.

If your event falls during the Congressional session, Fridays and Saturdays at any time of day are best for Congressional members.



F5 TIP:

Legislative Calendars

The fall recess between Legislative sessions is the best time of year to invite State and Congressional policymakers to participate, since they are more likely to be working in their districts during weekdays and on the weekends.

Choose a location

There are several things to consider when looking for potential locations, including:

- 👉 Look for a familiar place where the public is used to going, including public buildings such as city halls, community centers, park districts, local schools, and libraries.
- 👉 Ideally, the venue will be low- or no-cost with excellent audio/visual capabilities (microphones, PowerPoint projector, etc.), plenty of free parking, and accessible by public transportation.
- 👉 See our Sample Event Budget in this section for potential venue costs/tips to consider when selecting a location.
- 👉 Think about how the location fits within the communities served by your panelists/policymakers. For example, consider a gathering place that is on the border of two districts, located within an overlapping district, and/or easily accessible to the constituents of the policymakers you plan to invite. Avoid potentially contentious places and event spaces.
- 👉 Tune in to your local network and partners to guide your location vetting process.



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Conduct a site visit

As soon as you identify a potential venue for your town hall, be sure your planning team visit the location to view the room and discuss:

- ✓ Rental costs
- ✓ Seating capacity
- ✓ Room layout and responsibility for set up (facility or planning team)
- ✓ American Sign Language (ASL) and/or other language interpreter services logistics and layout
- ✓ Audio/visual equipment needed or available in-house
- ✓ Parking — availability, convenience, and cost
- ✓ Refreshments — availability, requirements, and restrictions
- ✓ American Disabilities Act (ADA) accessibility
- ✓ Insurance requirements, if any
- ✓ Security costs, if any
- ✓ Space for on-site child care during the event



F5 TIP:

Target number of guests

The more the merrier! That said, making sure you have the right audience — that your most influential guests and closest partners are in attendance — should be priority. Aiming for 50 guests is a good target for your first town hall, especially if attendees are actively engaged in the issues and willing to ask questions of panelists and presenters. The “Event Structure” section includes a Sample Internal Agenda and this section includes a Sample Event Budget, both of which were created with an audience of 50 in mind.

See the “Invite your guests” section below for more information.

CHECK IT OUT!

Evaluating audio/visual options

Good audio/visual equipment is critical to a successful town hall. On your site visit, test the system to make sure presenters can be heard from the back of the room. Consider how many microphones you’ll need for participants, as well as for audience questions. Ideally, the moderator and each panelist should have his/her own microphone. You’ll need one or more cordless microphones for the audience, depending upon how you plan on fielding audience questions. For example, do you plan on:

- 👉 Asking guests to line up at a standing microphone?
- 👉 Assigning one or more runners with wireless mics for guests with their hands raised?



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Think through the room setup

There are a variety of ways to set up the room, depending upon the audience size and desired atmosphere (formal vs. informal, lecture vs. workshop). We recommend striving to create an atmosphere that feels intimate and interactive to both the panelists and the guests, despite the size of the room. Making the event feel like a community conversation rather than a formal lecture allows the panelists and guests to feel more engaged in the questions and creates a more personal connection to the community members and issues at-hand.

While more formal, the “auditorium style” (also called “theater style”) format is often used for panel discussions and presentations because it maximizes seat capacity and allows audiences to be close to the panel and presenters. With this style, the meeting room should include space at the front for:

- 👉 A screen and projector
- 👉 Table with microphone(s) and chairs for panelists
- 👉 Podium with microphone for presenters and the moderator
- 👉 Additional microphone for audience questions
- 👉 Seats in the front row reserved for VIPs and community members, including those designated to open the town and introduce the moderator

Chairs for guests are placed in rows, facing front either in a straight row, as a semi-circular, or herringbone style (angled toward the front). Be sure to give guests plenty of space by offsetting each row so that people are not sitting directly behind one another, and leaving three to six inches between chairs and two feet between rows.

CHECK
IT OUT!

How to create a more “conversational/informal” feel

You also could choose to do a variation of the “auditorium style” format, for example, by staging the area at the front to be more informal like a talk show (think “The Ellen DeGeneres Show”). Instead of sitting behind a table, panelists (and the moderator) could sit on comfy chairs or a couch. Keep in mind presenters’ and panelists’ comfort, presentation logistics, and how much they will have in their hands during the event:

- 👉 Do they have a place to set water, notes, and the materials you provide them?
- 👉 Do they have a presentation that requires a computer or a remote, and can they see the screen from where they are sitting?



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Select your topics

The town hall provides an avenue and opportunity to engage policymakers and the public in the issues that are most important to First 5 and your community. The town hall concept is envisioned to achieve a shared outcome in each county — an annual community event focused on the state of young children — that can be customized to feature issues most critical to reaching your county’s policy education goals.

Based upon the most critical challenges facing young children and their families across the state, and the best opportunities for state and local policy change in 2016, we recommend you select no more than three issues to feature at your town hall. Topics could include:

-  Quality early learning
-  Early identification and intervention
-  Family strengthening
-  Oral health
-  Tobacco and e-cigarette prevention/cessation

Invite participants

Invite policymakers, expert presenters, and the moderator as soon as possible to confirm their interest and willingness to participate, and to identify potential scheduling conflicts.

The “Participants” section includes detailed strategies and tools for inviting policymakers, including how to create the ideal mix of policymakers and a template invitation.

Invite your guests

As soon as the date, time, and location are confirmed, send a “Save the Date” invitation to your guest list. Include as much information as you have available about topics, presenters, and panelists to create a “hook” for guests to attend. There are several great services that will allow you to electronically create, customize, and send professional-looking invitations, as well as track deliveries, opens, bounce-backs, and RSVPs at no cost. Services include, but are not limited to, Paperless Post (paperlesspost.com), Eventbrite (eventbrite.com), and Evite (evite.com).

Soon after sending your blanket invite, follow up your “Save the Date” invitation with personal phone calls to key influencers and organizational leaders on your guest list to personally invite them to attend. Also, be sure to monitor deliveries, opens, and bounce-backs, and make follow-up phone calls, as needed.

F5 TIP:

So many issues, so little time!

With limited time during a 90-minute event to provide an overview and context for the issues, we recommend featuring up to three issues that are most relevant and timely for your community. Curating the number of issues covered will help First 5 have a unified voice, increasing the likelihood that our messages and Calls to Action gain a collective momentum across the state. Focusing on fewer policy areas may ultimately make it easier for policymakers to commit to taking action on those areas.



F5 TIP:

Be prepared to discuss event program specifics, including information about the agenda, how the program will be structured, topics to be discussed, others invited to participate on the panel, and the exact role you want them to play.



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Two months before the town hall, send a more detailed invitation with confirmed/invited panelists, expert speakers, and issue areas to be covered. Be sure to request an RSVP and include an RSVP deadline (recommended to be a week prior to your event).

CHECK IT OUT!

Provide guests with on-site child care

Ensure guests who are parents can attend by providing free on-site child care during the event. Make sure to include information on all of your guest invitation materials that the event will offer free on-site child care. In the RSVP section of your invitation, ask guests to check a box if they will need child care during the event (so you get a sense of total children when you are budgeting for your event).

Reach out to your local community college's early childhood education program to see if they have a lab school and/or know students who need hours to meet their experience requirements. See if they would be willing to partner with you on child care services for the town hall.

For child care options and estimated costs, see the Sample Event Budget in this section.

Prepare materials

While you don't want to overwhelm guests with too much information, you will want to provide key handouts designed to help the audience follow the program and issues to be discussed. Handouts also provide an opportunity to showcase your county commission and the work of First 5 and your partners in the community. If you have multiple handouts for your guests, consider putting together folders with the documents inserted beforehand for a clean, professional presentation.

For example, handouts could include:

- 👉 Agenda with biographies of speakers, policymakers/panelists, and moderator
- 👉 One-page flyer with an overview of your county commission
- 👉 One-page flyer with an overview of partners/co-hosts
- 👉 Customizable First 5 Issue Papers and First 5 Association fact sheets on the town hall topics
- 👉 First 5 Pledge Cards asking guests to stay involved
- 👉 Town Hall Evaluation Sheet



F5 TIP:

Use the back of your External Agenda

(hand-out) for biographies of your expert speakers, policymakers/panelists and moderator. Be sure to include information about First 5 and your county commission. This also is a perfect place to further recognize your partners/co-hosts and sponsors.



PLANNING AND HOSTING STRATEGIES

Remember to:

- ✎ Create a “hook”/slogan and/or brand for your town hall event, and repeat that messaging through your materials.
- ✎ Customize materials according to your selected issues, keeping in mind who is in your audience, and the issue-specific Calls to Action that are important to your local community and through which you want your panelists to engage in.
- ✎ Recognize partners/co-hosts and sponsors as much as possible in handout materials by including their name, logo, and URL.
- ✎ Place handouts online, if possible, so that they can live well beyond the town hall event.



Promote your town hall

See the “Promotion” section of this toolkit for strategies, tips, and tools for promoting your town hall.

Executing your town hall

This section includes a detailed Planning Timeline for you to use in planning and promoting your town hall. In addition, the following are some key details and tips to keep in mind:

Reconnect with participants

- ✎ A month prior to the town hall, plan to reconnect with panelists, speakers, and the moderator to confirm details, including their roles and responsibilities, and to ensure there are no outstanding issues. Invite participants (especially policymakers) to a briefing either in-person or by phone. Doing so will help make sure everyone has the information they need, put the participants at ease with the event/materials, and also build relationships.
- ✎ A week prior to the town hall, verbally check in with participants again to answer any new questions and confirm their arrival time.

F5 TIP:

When should participants arrive at the town hall?

Invite your participants to arrive 15 to 30 minutes before the start time to become familiar with the meeting room and audio-visual set up, as well as to meet and talk with guests, commission staff, and fellow participants. You also can choose to add a refreshment reception ahead of (or after) the town hall to make this warm-up time officially part of the event.



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Reconnect with the event location manager

- 👉 A month prior to the town hall, contact the location manager to confirm all logistical details and room set-up.
- 👉 A week prior, verbally check in again to make sure all details are set.

Discuss event-day roles with your team

Two weeks prior to the town hall, work with your planning team to make sure everyone has a role in creating a welcoming atmosphere and making the event day a success. Designate point people for each of the following tasks:

- 👉 Working with the event location manager to ensure the room is properly set up and audio-visual equipment is working properly
- 👉 Greeting and assisting guests at the registration/literature table
- 👉 Greeting and assisting policymakers
- 👉 Greeting and assisting expert speakers
- 👉 Greeting and assisting the moderator with fielding questions (if needed), keeping time, and staying on schedule
- 👉 Taking photos and keeping track of event highlights, such as memorable quotes, Calls to Action, and audience questions



F5 TIP:

Lay the foundation for audience questions

Consider asking guests you know well to bring questions to ask panelists. You might even suggest some topic areas questions they might explore. That way they'll be ready with some thoughtful queries when the town hall is opened to audience questions.



CHECK IT OUT!

Create an inviting atmosphere

Consider asking a high-profile community influencer, such as a county commissioner, to meet and greet participants and guests as they arrive to help create an inviting atmosphere. Also, designate a commission staff member who is well briefed on participants (backgrounds and photos), as well as the event's content and flow, to greet participants and address any last-minute questions they may have. Again, think about all the different ways you can use reliable, trusted interns for the day-of responsibilities, such as room set-up and greeting guests at the registration/literature table.



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Ask participants to take the First 5 Pledge

One of the town hall's key goals is to compel — first and foremost — policymakers, other participants, and guests to commit to improving the lives of children 0 to 5 at this year's town hall event and in the future. One of the most important moments of your town hall will take place near the end of the event as the moderator summarizes the issues and next steps, and asks both policymakers and guests to make a pledge to take action.

See Sample Internal Agenda in the "Event Structure" section for information about event structure.

This section includes templates for two different types of First 5 Pledge Cards — one targeted to policymakers and one geared toward your guests — that you can customize and use to encourage their commitment to support First 5 through tangible action items. Not only do the cards summarize messages/Calls to Action from your town hall, they also provide a tangible, measurable result of the town hall and bridge to concrete next steps.

See "Securing a commitment" in the "Participants" section for more advice on how to engage town hall participants to pledge.



F5 TIP:

Prep policymakers about the First 5 Pledge

It is vitally important you talk with participating policymakers in advance of the town hall about the First 5 Pledge — what it means to the event and what you will be asking them to do. Provide a copy of the First 5 Pledge Card (for policymakers) should you choose to use it. After all, we want policymakers to come away with a positive experience — and to participate again at next year's town hall or other event. You don't want them to be caught off guard, especially in a public setting.

Ask guests to evaluate the event

Use the customizable Sample Town Hall Evaluation Sheet in this section to gather feedback from participants and guests about your town hall and to help measure results. During your event, be sure to:

- 👉 Give the form to all guests and participants (including policymakers' staff) at the beginning of the event. Include with the handouts, place on the chair, or pass them around after everyone is seated. That way even those who have to leave early will have a chance to provide their feedback.
- 👉 Make sure you ask participants (via the moderator at the end of the event) to complete the evaluation sheet and tell them how you will use the information, which is to evaluate impacts of the town hall and enhance future events.
- 👉 If possible, provide a box near the exit



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Post Town Hall Follow-Up

Continue the momentum

Continue the momentum created through the town hall conversation, the First 5 Pledge, and Calls to Action by:

- 👉 Sending thank you letters to participants who committed to next steps discussed at the town hall
- 👉 Touting your event's success by submitting a press release and photos to local media that includes the event highlights
- 👉 Sending a thank you and summary to audience members, reminding them of the First 5 Pledge, and the work that needs to be done together
- 👉 Posting on social media event highlights, including panelist quotes, presenter/guest personal stories, and photos



Report back

Conduct a debrief with the planning team no more than two weeks after the town hall to discuss how it went overall and suggestions for future events. In addition, please complete the First 5 California survey. Note: this information is for internal use only for shaping the tool kit and future town halls. The survey will explore the following:

- 👉 Number of people who attended the town hall
- 👉 Number of key target audiences that participated (the number of policymakers, in particular)
- 👉 Number of key target audiences that attended
- 👉 Number of new relationships with key target audiences, including policymakers and influencers
- 👉 Number and content of news stories about the featured issues and/or the town hall
- 👉 Feedback provided by audience members on the town hall evaluation form
- 👉 Number of First 5 Pledge Cards returned, especially those from influencers
- 👉 Anecdotal information about commitments by policymakers to support issues





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Tools Available in the “Planning” Section:

- ✓ **Planning Timeline** checklist to keep track of all your planning- and promotion-related tasks beginning three months out from the event
- ✓ **Sample Event Budget** includes price range options and cost-saving tips for an event with 50 guests in a mid-sized, semi-rural community
- ✓ **First 5 Pledge Card Templates** include two different types of customizable First 5 Pledge Cards – one targeted to policymakers and one geared toward your guests
- ✓ **Event Sign-In Sheet Template** to record the contact information of your town hall guests
- ✓ **Sample Town Hall Evaluation Sheet** to gather feedback from participants and guests about your town hall and to help measure results

You can use these templates exactly as outlined, adapt them, or create new materials to meet your needs.

See the “Promotion” section to learn about the outreach tools and strategies involved in making your town hall a success.

F5 TIP:

Paid Advertising Tip Sheet and Sample Advertising Budget

If you are interested in exploring more ways you can use paid advertising, see the “Promotion” section for ideas, tips, and a Sample Budget specifically for advertising options.

