IN LEAGUE IN NEW YORK STATE

A Guide to Managing Local Leagues
Table of Contents

1 THE PRESIDENT AND THE BOARD
   The President and the Job................................................................................................................................. 6
   Co-Presidents/Steering Committee .................................................................................................................. 10
   Checklist for Local Leagues ............................................................................................................................ 12
   Sample Board Meeting Agenda ...................................................................................................................... 13
   Planning for Your Annual Meeting ................................................................................................................ 14
   Helpful Hints for Secretaries .......................................................................................................................... 19
   Guide for Board Orientation ............................................................................................................................ 23
   Best Practices--Suggested Guidelines for Local Leagues............................................................................... 25
   Local League Requirements and Standards ..................................................................................................... 29

2 POLITICAL YET NONPARTISAN
   Nonpartisan Political Policy and Local League Boards ................................................................................ 31
   Nonpartisan Political Policy for Members of the Board of the League of Women Voters of NYS .............. 33
   Sample Nonpartisan Policy Statement for Local Leagues........................................................................... 34
   Some Random Thoughts on Nonpartisanship .............................................................................................. 35

3 BYLAWS: HOW THE LEAGUE GOVERNS ITSELF
   Revising League Bylaws ................................................................................................................................. 37

4 NOMINATING LEAGUE LEADERS
   Nominating League Leaders ........................................................................................................................... 39

5 MEMBERSHIP RESOURCES
   LL Membership Director Job Description & Duties
     Job Description ............................................................................................................................................... 43
     Developing a Membership Plan .................................................................................................................. 44
     Attracting Prospective Members ............................................................................................................... 44
     Welcoming New Members ......................................................................................................................... 45
     Retaining Members ..................................................................................................................................... 46
     Non-Renewals---Don’t Give Up ............................................................................................................... 47

   Starting a New League
     Welcome to the LWV: How to Start a New Chapter [How to form a Member-At-Large (MAL) Unit]... 49
     Supporting Documents:
       ILO/MAL Policy (see page 90)
       Welcome to the League brochure [handouts for all members] (see page 100)
       Instructions for applying for EIN # (see page 54)
       Sample Nonpartisan Policy [for Organizing Team] (see page 34)
       Sample Use of Calendaring: Planning for & Execution of Member Recruitment (see page 55)
       Sample Event Planning Check List (see page 58)
       Quarterly Report Form [for Coordinator/Team Leader] (see page 59)
       Use Your Bulletin for Membership Recruitment/Retention (see page 84)
       Instructions for filing Form 990N with the IRS [for Treasurer] (see page 109)
       LWVUS Local League Recognition [Application to Request a Move from MAL Unit status to Local League status] (see page 60)

   Keeping Membership Statistics [General Guidelines for Reporting to National] ...................................... 63
6 RAISING AND MANAGING MONEY

Tips for Treasurers/Job Description.......................................................... 105
Sample: Expense Voucher for Board & Committee Members ......... 106
Membership Dues .................................................................................. 107
PMP ....................................................................................................... 107
Use of Tax Deductible Contributions to Pay for PMP................. 107
IRS E-Postcard-990-N ........................................................................ 108
NYS Charities Bureau Registration ......................................................... 111
Acknowledgement of Donations .............................................................. 112
Calendar for Treasurers ....................................................................... 113
Annual Audit ......................................................................................... 114
Liability Coverage for Local Leagues .................................................... 116
Local League Use of Tax Deductible Funds ........................................ 117
Sample: Proposed Budget .................................................................... 119
Policies on PMP and Arrears ................................................................. 120
Budgeting for Growth - The Committee at Work ............................... 121
Recommended Budget Procedures ................................................................. 122
Sample: Local League Budget Form .............................................................. 125
Local League Budget Item by Item .............................................................. 127
Financing the League/Development Director Job Description ...................... 132
Model for Special Event Planning .............................................................. 137
Endowment Funds ...................................................................................... 139
LWVNYS Development/Fundraising Policy .................................................. 139

7 COMMUNICATION/PUBLICATIONS
Promoting the League .................................................................................. 141
How to Edit a League Bulletin ...................................................................... 144
Putting Publications to Work ....................................................................... 147
Criteria for Evaluating Proposed Publications ............................................ 149
Sample Publication Proposal ....................................................................... 150
Publications - Policy for Statewide Distribution or Scope ............................. 151

8 PROGRAM: STUDY AND ACTION
Directing a League Study .............................................................................. 153
Consensus ..................................................................................................... 157
Concurrence .................................................................................................. 160
State Consensus/Concurrence Guidelines & Policies ...................................... 161
Tips for Discussion Leaders ........................................................................ 162
Directing League Program ........................................................................... 164
Directing League Action on Issues ............................................................... 165
Guidelines for Working With/Joining Coalitions .......................................... 171
Coalition Building ....................................................................................... 171
Lobbying for Other Levels of the League ..................................................... 173
 Maneuvering Around the Capitol ................................................................. 173
League Position and the Individual Member ................................................ 176
Action Calendar ........................................................................................... 177
Speaking With One Voice: Action Guidelines for Local Leagues ................... 178
Financial Disclosure Requirements for Action on Ballot Issues .................... 179
Procedures and Guidelines for State and Local League
Participation in Legal Action ........................................................................ 179
Observers: The Eyes and Ears of the League ............................................. 180

9 VOTER SERVICE
Voter Service/Job Description ..................................................................... 183
Guidelines for Candidate Participation in Debates & Forums ....................... 186
Formats for Candidate Debates .................................................................. 187
Debate Co-Sponsor Guidelines .................................................................... 187
Guidelines for Conducting Community Election ........................................ 189
Fair Campaign Pledge ............................................................................... 190
Guidelines for Publishing Voters Guide ..................................................... 191
THE PRESIDENT
AND THE BOARD
BOARD STRUCTURE

A variety of job descriptions and listings of responsibilities as well as thoughts regarding mindset and best practices have been included for many potential board portfolios. It is important to note that local Leagues can and do operate under a wide array of board structures. It is not necessary to fill each of the following roles with one individual per role. Positions can certainly be combined, shared between more than one member or even eliminated in the case of more obscure positions in order to meet the needs of the local League given the availability of volunteer resources.

THE PRESIDENT AND THE JOB

JOB DESCRIPTION: PRESIDENT

OBJECTIVES: To oversee and coordinate the activities of the League and to ensure that the League continues to serve the best interests of the community and of its members.

RESPONSIBILITIES:

1. Plan, coordinate, and preside at meetings of the board and at the annual meeting.
2. Identify and recruit members for League responsibilities.
3. Represent the League to the public, government officials, the media and other levels of the League.
4. With the assistance of the board, set policies and goals.
5. Serve as a catalyst to encourage activities which are in the best interests of the League.
6. Seek ways to cooperate with and use the expertise of individuals and groups to further the goals of the League.
7. Advise, assist, and encourage individual board members as needed. Supervise work of board members to ensure meeting of deadlines and competent performance.
8. Review and approve all major League publications before printing.
9. Serve as an ex officio member of all committees, except nominating committee.

***********************************

ENTHUSIASM, TACT, PATIENCE and HUMOR are perhaps the four most valuable assets one can bring to the job of president of a local League. It helps to be well organized, get to the mail PROMPTLY, read it and have a plan for delegating what needs to be done. In the final analysis, the success of the League during a president's tenure will depend on the way the president handled the job and interacted with others, rather than on the excellence of the filing system. Remember to have fun!

Confidence and a genuine enthusiasm for the League's program will be reflected in the attitudes of the board and the membership. Let people know that their contributions are valuable and that their thoughts and ideas are needed. This will make it easier to enlist directors and committee members. Conversely, negative messages from the president will generate similar attitudes. Try to be as professional as possible. Expect excellence and work to get it.

It is natural that the president receives the acclaim for jobs well done by the League. Be sure to give praise, credit and encouragement to others wherever possible.
Together with the successes will come the inevitable mistakes. When the League is in error, be prepared to accept responsibility and rectify the error. This will add to your stature as a League leader and eliminate the kind of recriminations that help no one. Use the opportunity to guide the League toward the kind of constructive analysis that will avert future mistakes. Good board discussion of failures as well as successes leads to better planning.

Avoid the trap of making decisions alone or of doing the work for which someone else is responsible. The League will be stronger at the end of the president's term if everyone has shared in the responsibilities and satisfactions of the total League effort.

It has been found that a League works most effectively when its president:

- Is quick to help when things go wrong and praise when they go well.
- Coordinates various activities of the League.
- Is efficient as an administrator.
- Understands the views and sentiments of the members.
- Knows what she/he is doing.

Remember that the president is not alone. Neighboring Leagues are willing and eager to interact. The state League liaison or membership vice president is also there to help. When in doubt, call. Many local League presidents have discovered that, while the job seemed overwhelming at first, as time went by they found themselves developing greater resourcefulness, understanding, efficiency and assurance. It is a challenge during which leadership qualities emerge and there is a tremendous sense of personal growth.

**COMMUNICATIONS**

*League Basics (In League)*: (LWVUS) is the basic reference for all League activities. Most questions will be answered there. For answers to additional questions, consult other League publications, liaison or membership vice president.

Presidents should receive files from their predecessors, including a job description and a list, by month, of the most important work/deadlines. If not, develop both the job description and the list immediately.

Determine the best method to contact board members. Make a list work/deadlines and distribute it to the board.

Develop a regular system for conferring with board members in order to make plans and to check on their implementation.

**PLANNING THE BOARD MEETING**

Careful planning is needed to avoid the board meeting that goes on indefinitely and fails to reach conclusions on matters that need immediate decision. As soon as the board meeting ends, start preparing an agenda for the next one. If the vice presidents are used in supervisory roles, consult with them about those portfolios under their supervision that need the most time; otherwise, confer with each director about the time she/he will need, as well as the nature of the discussion and the decisions necessary at this time. Every meeting should include a membership report and a treasurer's report, and the treasurer can estimate how much time at the board meeting needs to be spent on financial matters.

---

*Survey Research Center, University of Michigan*
Some local Leagues use an executive committee to plan the agenda for the board meeting. However, this will add another meeting to your schedule and, if not careful, could turn into a mini-board meeting which is not advisable. Policy decisions should be made by the whole board.

Agree on the amount of time needed to complete the agenda, and prepare and distribute a timed agenda to board members ahead of the meeting, along with the minutes of the previous meeting. Much time can be saved if Board members circulate written reports (usually by e-mail) prior to the meeting, so that allocated time can be spent on discussion rather than on describing the content of the report. Absentees should notify the president (or designated person) before the meeting, send written reports, and inform themselves of pertinent matters after the meeting.

The president acts as discussion leader, to keep discussion focused, not to intrude personal viewpoints. Simple parliamentary procedure is advisable for clarity and brevity. Keep a record of things to do and things which have been assigned to others. Start and end on time. Good minutes help everyone do a better job. Having someone review the draft before duplicating will minimize the need for corrections. Minutes should contain the board's decisions, who will do them, and when.

**INTERACTION WITH THE PUBLIC**
All statements and official letters should carry the name of the president and, if desired, the appropriate director.

All public statements should be checked with the president and, if there is anything questionable, cleared with the board.

All public meetings, communications and publications (including bulletins) should be approved by the president or a designee. Reports should be kept of all meetings and on interviews conducted.

**PAPERS, PAPERS, PAPERS**
Monitor all League communications and address personally or delegate to the appropriate person.

Maintain a record of all documents required for League and IRS compliance and keep everything that your League would need for its historic record. Save state and national League materials only as long as they are current or until they have been replaced by updated materials. Be sure that each board member also maintains appropriate files. Ask for, and keep year-end reports.

**INTERACTION WITH THE STATE LEAGUE**
Do not hesitate to call upon the members of the state board and our Albany staff for assistance in carrying out your responsibilities as president of a local League.

Members of the state board prepare reference materials for local League board members on a regular basis. This publication, called the *State Board Report* (SBR), is available in its entirety on the League website and is distributed to the local League presidents list serve five times a year. In addition, appropriate sections are distributed to other board members via the topical list serves. Additional hard copy subscriptions for other board members can be ordered (fee). Additional Presidents' mailings are distributed when needed.

The state League provides periodic area training meetings which all local League members may attend. Workshops on both program items and administrative areas are generally offered. Encourage your members to...
attend--the interaction with state board members and with other local League members sharing the same interests is stimulating and informative.

Participation at state and national League conventions and councils (state council is currently being done by mail) held in alternate years is restricted to delegates, although additional members are welcome and may attend as observers. It is important for your League to be represented at these meetings, and it is, therefore, essential to budget for travel, hotel, meals and registration fees for your delegates in your League budget. The knowledge and enthusiasm acquired by delegates is well worth the expense.

RESOURCES

- In League in New York State (LWVNYS): Contains job descriptions and policies for local League boards. See especially the section on local League use of tax-deductible funds. http://www.lwvny.org/LLresources.html
CO-PRESIDENTS/STEERING COMMITTEE

Some local Leagues choose not to have a single president but rather an alternative to the traditional board structure. Two of these alternatives are co-presidents and a steering committee.

CO-PRESIDENT

Key to the success of co-presidents is a clear chain of command to avoid duplication of effort and responsibilities "falling through the cracks." The division depends on the individuals but needs to be spelled out to avoid confusion between themselves and the rest of the board.

**Pluses**
- shared responsibility
- efficient use of the talents of two people
- back-up leadership
- incentive for newer members to serve
- leadership development
- opportunity for differing age and/or geographical representation

**Pitfalls**
- personality conflicts
- uneven division of work
- confusion about the chain of command
- gaps in communication
- duplication of effort
- more time required for coordination
- co-presidents may assume too much responsibility

**Possible Alternatives**
- one year presidency
- better utilization of vice presidents

STEERING COMMITTEE

Some local Leagues operate with a steering committee in place of the traditional board structure when they cannot get a president and/or board members. The steering committee, with guidance from the membership at the annual meeting, sets only a few priorities and doesn't try to undertake all of the traditional League activities. Some League jobs are done by the steering committee; others are delegated to non-committee members. Often members are willing to take on a job—or part of a job—if they don't have a formidable title and the demands of being a board member. This structure allows flexibility for a League that is experiencing problems and is a temporary arrangement while the League builds membership and leadership.

Below are some sample structures for organizing a board with co-presidents.
SOME ALTERNATIVE STRUCTURES FOR CO-PRESIDENTS

Co-President
1st Vice President
(Administration)

Secretary
Treasurer
Membership
Finance/Development
Public Relations
Bulletin & Mailing
Publications
Delivers Charge: Budget & Nominating Committee

Co-President
2nd Vice President
(Education, Program & Action)

Local Program Studies
State Studies
National Studies
Action
Program Speakers
Voters Service (all levels)
Observers
Meetings

Co-President
Co-President

Secretary
Treasurer

State VP
Voters Service
Publications
ILO
Program Chairs

National VP
Membership
Bulletin
Public Relations
Program Chairs

Local VP
Voters Service
Finance
Observers
Units/Meetings
Program Chairs
CHECKLIST FOR LOCAL LEAGUES

The following is a list of items that need to be done as you start your League year:

___ Confirm that all board members have received files from previous director.

___ Plan the year's calendar.

___ Plan membership campaign.

___ Prepare or update membership handbook.

___ Begin voter service work for November election.

___ Review with your board your local nonpartisan policy.

___ Plan finance drive or other fundraising activity.

___ Appoint members to nominating and budget committees, and bylaws committee if necessary.

___ Organize observer corps.

___ Urge board members to recruit committee members.

___ Order state and national publications board members will need for their portfolios.

___ Maintain contact with your state board liaison and arrange for board training, orientation, prospective member meetings, program speakers, or assistance as needed.

___ Remember to share good news with the state League office!
SAMPLE BOARD MEETING AGENDA
(Please note: Comments in ( ) are informational, do not include in agenda.)

LWV of ___________________________ Board Meeting     Date: ________________
Place: ___________________________     Time: ________________
Directions: ___________________________

AGENDA

7:00 P.M.     COFFEE (optional)

7:15 P.M.     MINUTES (Any additional corrections?)     M. Patterson

TREASURER'S REPORT     J. Smith
(Previous balance, expenditures including PMP's, income, current balance, and new membership data if not covered by a membership report)

PRESIDENT'S ANNOUNCEMENTS & CORRESPONDENCE     T. Blair
(Correspondence from national, state and other leagues, invitation, local concerns, etc.)

7:30 P.M.     MEMBERSHIP REPORT     R. Corby
(Current paid members, number of new members since last report, drops, total current membership compared to last year, prospects for getting and involving new members, plans for orientation, etc.)

7:45 P.M.     PUBLICATIONS     S. Hall
(Distribution of new material, plans for local publications, etc.)

FINANCE     M. Miller
(Progress of finance drive, plans for campaign, prospects, follow-up)

8:00 P.M.     LOCAL PROGRAM
(Statements to local boards, plans for meetings, review of consensus on local issues, etc.)

STATE PROGRAM
(Review of progress on state issues, action and studies, etc.)

NATIONAL PROGRAM
(Same as above, status of studies and action, meetings, etc.)

8:30 P.M.     BREAK (optional)

8:40 P.M.     BULLETIN     E. Page
(Content, deadlines, mailing help)

8:45 P.M.     VOTERS SERVICE     H. Rubin
(Plans, decision as to meetings, format, speakers bureau, distribution of FACTS FOR VOTERS, etc.)
9:00 P.M.       OTHER COMMITTEE REPORTS  (e.g.: Bylaws, Nominating, Budget, Social evening)

9:20 P.M.       GENERAL MEMBERSHIP MEETING    L. Lake
(Speaker, hospitality, place, etc.)

9:30 P.M.       NEW BUSINESS

DATES TO REMEMBER

Sept. 15       Primary Election Day
Sept. 19 - 9:30 am   Finance Drive letter writing -- Smith's
Sept. 23 - 7:30 pm   Master Plan meeting -- Johnston's
Sept. 28 - 7:00 pm  Board Meeting
Oct. 4    - 8:00 pm   New Member-Meet the Mayor Meeting -- Pell's

OCTOBER BULLETIN ASSIGNMENTS
   (to E. Page by Sept. 15th)

Linda Lake  - General Membership Meeting
Helen Rubin  - Candidates Forum
Miriam Miller - Finance Drive "Thank You"
Ruth Corby  - Membership Renewal Reminder

PLEASE call Terry Blair (111-1111) if you cannot attend. PLEASE bring your written report for the secretary.

PLANNING FOR YOUR ANNUAL MEETING

Members attending your League's annual meeting set the League's direction for the coming year by electing officers, adopting a budget, selecting program and possibly amending the bylaws. Listed below are suggested steps to take prior to the meeting to assure that procedures recommended in League and in your bylaws are followed. The time for holding an annual meeting varies; check your bylaws.

TIMETABLE
At Least Four Months Prior to Annual Meeting:
- A date for the annual meeting should be set.
- Budget, bylaws, local program and nominating committees should begin work. Be sure they have their materials and understand the deadlines for reporting to the board and membership. (Note that the president is an ex-officio member of all committees except the nominating committee.)

Three Months Prior to Annual Meeting:
- The bulletin and membership meetings should be used to discuss how local program is chosen and to solicit suggestions for study items.
- The nominating committee should request suggestions through the bulletin. List positions to be filled.
- Bylaw suggestions should be solicited using the bulletin.
Two Months Before Annual Meeting:
- Board should consider recommendations for local program sent in by voting members and formulate proposed program.
- Board should discuss tentative budget and agree on the budget to propose to membership.
- Board should appoint an auditor to audit treasurer's books, a parliamentarian for the annual meeting and board members responsible for presenting the recommended program.
- Board should discuss proposed bylaw changes. Recommendations should be sent to your state League regional director.

At Least One Month Before Annual Meeting:
Membership must be notified (usually through bulletin) of the following:
- Proposed program - Members must be notified of program recommended by the board. Though not specified in bylaws, it is in the spirit of League procedure to notify members of any subjects proposed which the board does not recommend (non-recommended items). See LWVUS In League. Check your bylaws to see what vote is needed for consideration of a non-recommended item, as well as the vote required for adoption. Remember that only program issues submitted by the bylaws deadline may be considered at the annual meeting.
- Proposed budget.
- Report of nominating committee.
- Proposed bylaw changes, if any. Prepare copies of these materials for distribution to members attending the annual meeting. Inform board members and committee chairs about their responsibilities at the annual meeting.

ANNUAL MEETING GUIDE
The following is a script to follow for your annual meeting. Remember to check your own bylaws to be certain of the vote percentage needed for approval of each item. Please copy the script, cut it up, and distribute it to the various directors who will have a role in the annual meeting, along with an explanation of what they are to do.

LOCAL LEAGUE ANNUAL MEETING GUIDE
"Will the _____________ annual meeting of the League of Women Voters of __________________ please come to order? In accordance with our bylaws, there is a quorum present to conduct the business of the meeting." (Check privately beforehand with your secretary to be sure that a quorum is present. Otherwise, the business meeting cannot go on.)

"The official recorder or secretary of this meeting is __________________. Our parliamentarian is __________________.

"It is customary that minutes of the annual meeting to be approved by a special committee as soon as possible following the annual meeting. Last year's annual meeting minutes were so approved. With your approval, the chair appoints _____________, and _____________ to read and correct the minutes of this annual meeting." (If your League has not used this system previously, then the minutes must be read aloud by the secretary or be written out in some way so that they are available to all members. The chair then follows the standard procedure of "are there any additions or corrections to the minutes, etc?" A motion is then needed to approve the minutes or the corrected minutes. Majority vote needed for approval.)
OR

Announce that the minutes of the last Annual Meeting were approved by the Board of Directors at its meeting in _______, and ask permission to refer to the minutes of this Annual Meeting to the Board of Directors for approval.)

Treasurer's Report "We will hear the treasurer's report. (Call on treasurer who explains her report and answers any questions pertaining to it.) Are there any other questions? If not, the treasurer's report shall be accepted and placed on file."

(If your League has completed its fiscal year, an auditor's report is given at this time. The Secretary reads the auditor's report and then moves the adoption of the report. "Madame President, I move the adoption of the auditor's report." Majority vote needed. If your League has not completed its fiscal year, you will need to report the auditor's report at another business meeting or let the members know in some other way.)

Budget - (The budget is usually the next order of business.)
"Will you please refer to the proposed budget for the coming year. (Members have received it as they entered or have found it at their seats.) ____________, budget chair, will present the budget as proposed by the budget committee and as recommended by the board." (The budget chair explains the budget and moves the adoption of the budget as presented. Requires a second. Under discussion of that motion, the budget may be read item by item and opportunity is given for amendments. Vote on each amendment as proposed in a motion.) "We will now vote on the budget as presented (or amended)." (Majority vote required.)

Bylaws - "Will you please refer to the proposed bylaws changes." (Members should have a copy in front of them and should have received them in writing one month prior to the annual meeting.) ", chair of the bylaws committee will present the proposed bylaws changes." (The chair reads them and moves the adoption of the proposed amendments.) "If there any discussion?" (The president then goes over each change separately asking for amendments.) "We will now vote on the motion to adopt the bylaws changes as proposed (or amended.)." (Requires a two-thirds vote.) (When bylaws are amended, the local board should make sure that copies of the amended bylaws are made available to the members and the board and that they bear the notation "as adopted on ____(mo.), ____(day), ____(yr.), and amended ____(mo.), ____(day), ____(yr.)." - listing all the times they have been amended.)

Special Reports - (Some Leagues include special reports such as a president's report, committee reports, report of convention, etc. You may want to include these here. However, it may be included at another point, such as just before or after the nominations.)

Program - "We will first consider the local program as recommended to you by your board and sent to you in the last issue of the bulletin. Adoption of the recommended program will require a majority vote. Not recommended items, also listed in the last issue of the bulletin, may be introduced for adoption, but must first be moved for consideration. (Not recommended items must have been brought to the program planning meeting and listed in the bulletin as not recommended. Items directly from the floor are not allowed, as members have not been previously notified.) If you wish to consider a not recommended item, you must do so in the form of a motion. This motion needs a second, is not debatable, and requires a majority vote. If a not recommended item is voted consideration, a three-fifths (check your bylaws) vote is necessary for its adoption. We will have the
presentation and discussion of all items, both recommended and not recommended, before we vote on adoption so that you may hear all of the discussion before voting."

"__________, board member, will present the first recommended item." (The board member will move the adoption of the item, given the exact wording. The motion requires a second. She will then explain the item after the second. If your board is recommending more than one item, the same procedure is gone through with each item.)

"If there are any not recommended items, this is the time to present them." (Any member wishing to present a not recommended item may do so by moving consideration of the item, giving the exact wording. Motion requires a second. She may present a very brief statement of reasons for presenting it. No discussion at this time. The chair calls for the vote. Majority vote is required for consideration. If the not recommended item is voted consideration, the person who proposed it then moves the adoption, Second required. It is a good idea to write all not recommended items on a blackboard or have them printed in advance, so that everyone can see the wording.)

"We will now have a discussion and debate on all recommended and not recommended items at this time. We will discuss them in the order in which they were presented." (Allow time for discussion for each item and get direction from the membership as to the scope of each item. Board members should be prepared to tell why the not recommended item was not recommended. The chair calls for the vote on the items after all discussion is completed. She reads the wording of each item before the vote and after the vote declares whether the item was adopted or not. At the conclusion of the voting, the chair announces the final program as adopted, or members may vote on all items at the same time by means of a written, secret ballot. Remember a recommended item requires majority vote, a not recommended item requires a three-fifths vote. Check your bylaws).

(Occasionally, a member who desires a one or two item agenda may move that the local program be limited to one or two items. This motion is out of order and the chair should explain that all items -recommended and not recommended- are legally before the meeting and that each must be voted on. She may further explain that members who are interested in limiting the program achieve this result by voting for only the numbers of items they would like to have on the program. A motion to reconsider may be used by a member if she feels that the adopted program is too large. In this case she must have voted on the prevailing side; the person who seconds the motion does not. The motion to reconsider requires a majority vote. If reconsideration is voted, the original motion is then before the meeting as though no previous vote had been taken. This same process to reconsider may be used by a member whose item has been defeated.)

"You have adopted the following as your local program for the coming year: ____________________________

Nominations "______________, chair of the Nominating Committee, will read the report of the committee." (Call on chair who reads the slate. No action is taken on the report.)

"The Chair declares that nominations are now in order from the floor provided the consent of the nominee has been obtained. The Nominating Committee has nominated ______ for _________________. (Have each nominee stand as you call the office and name. After you have run through all the offices and asked for nominations for each, again ask for any further nominations.) If there are no further nominations, the chair declares the nominations are closed."
"The chair entertains a motion that the nominating ballot become the elective ballot." (Must be moved and seconded from the floor; majority vote required.) The chair instructs the secretary to cast a numerous ballot. The chair declares the following are elected: ________, ________, ________, etc."

(Read the name of the nominee for each office in turn and ask for a voice vote after each name. Declare each person elected as the vote is taken.)

OR

(If there are nominations from the floor: (1) appoint tellers and ask them to distribute ballots (blank paper); (2) repeat names of nominees for each office; (3) tellers collect ballots and make count; (4) Ask teller to announce the result of the vote; (5) declare names of those elected to each office.)

(Thank-you and acknowledgments.)

(At this point, you may turn the meeting over to the new president who may wish to greet the members and make some brief announcements.)

Direction from the Floor - (Use this time to draw out members' opinions and feelings about how the League operates as well as on development of program and services.)

Announcements

Adjournment - "Is there any further business to come before this meeting? If not, we are adjourned." OR "The chair entertains a motion that the meeting be adjourned." (Motion is made from the floor, requires a second, and a majority vote.)

Important Tip - Do not assume that all directors are aware or informed about their responsibilities at the annual meeting. A phone call to each individual board member participating or a "dress rehearsal" at the previous board meeting insures smoothness and continuity and is strongly recommended.

Be sure that someone is prepared to make all necessary motions and to serve as minutes committee, etc.

RESOURCES

- **In League in New York State** (LWVNYS): Contains job descriptions and policies for local League boards. See especially the section on local League use of tax-deductible funds. [http://www.lwvny.org/LLresources.html](http://www.lwvny.org/LLresources.html)
- **Successful Annual Meetings** [http://www.lwv.org/AM/Template.cfm](http://www.lwv.org/AM/Template.cfm)
HELPFUL HINTS FOR SECRETARIES

JOB DESCRIPTION: SECRETARY

OBJECTIVES: To document and maintain the official record of all business conducted by the League.

RESPONSIBILITIES:
1. Take minutes at all decision-making meetings of the League and at the annual meeting.
2. Maintain records of attendance at all board meetings.
3. Prepare and distribute minutes in a timely fashion.
4. Maintain a hard copy file of all minutes with corrections and written reports.
5. Assist with League correspondence as needed.
6. Sign official papers.

The secretary records all plans, proposals and decisions made by the local League board. Minutes, the historical legal record of the organization, are kept of all meetings where business is conducted: board meetings, annual meetings, and any others at which decisions are made.

MINUTES - THE RECORD OF LEAGUE POLICY MAKING
It is helpful to understand the uses to which minutes may be put:
• To remind present board members of decisions made and actions which they should take.
• To tell absent members what happened at the meeting.
• To tell future interested people why certain decisions were made and what the League's reasoning was at the time.

WHAT SHOULD BE INCLUDED
• Name of League, type of meeting, date, time and place.
• Name of presiding officer, those in attendance, those absent.
• Record of all corrections to minutes.
• A treasurer's report - the previous balance, income and expenditures and present balance.
• A membership report - current number including new members and drops.
• All motions, in their entirety, including the name of the mover, whether it was seconded and the final vote.
• All pertinent discussion and policy decisions.
• All dates of activities.
• Names of those suggested for committees and jobs.
• Identify each person completely the first time they are mentioned in the minutes; use last name thereafter.
• Record subjects in the same order as they appear on the agenda. (It is helpful to use paragraph titles and capitals for each item - e.g. TREASURER’S REPORT, ANNOUNCEMENTS, etc.)
• Copies of communications directed to League (not material from LWVNYS/US unless specific to the local League).
• Time of adjournment.
• To serve as the legal record of the League’s operations and authority to act.
Helpful Hint: Because the minutes often contain ‘to do’ lists for board members, it is helpful to circulate them as soon as possible after the meeting.

**DUTIES OF THE SECRETARY**

- If unable to attend a meeting arrange for a substitute.
- Gather written reports from board members for use as a basis for the minutes.
- Write a rough draft of the minutes as soon after the meeting as possible and send to the president to correct.
- Distribute a binder of the minutes with the next board meeting agenda (obtained from president). - Keep a file containing copies of all minutes, reports and any relevant addenda to the minutes. These form the historical legal record of your League.
- **Fill out local board list form sent by LWVNYS every June. Immediately send changes to state office to ensure.**
- Provide motion slips and encourage all motions to be written on them.

**ANNUAL MEETING MINUTES**

Please be sure that the following information is included in your local League's Annual Meeting minutes so that your League files will have records of the decisions made and action taken.

- Number of annual meeting (e.g. 15th)
- Number of members and guests present
- A quorum was present
- Rules were adopted
- Name of parliamentarian
- Record of previous annual meeting minutes approved
- The names of the committee to approve this year's minutes
- Treasurer's report
- Audit report
- Special reports
- Adoption of the budget
- Bylaws changes adopted?
- Local program adopted, with some reflection of the discussion and reason for its adoption
- Officers and Directors elected and terms of office
- Direction to the Board of Directors (from members)

**SAMPLE MINUTES**

The Board of Directors of the League of Women Voters of _________ was called to order by________(name and League position) on __________ (date) at_______(time) at__________(place).

**PRESENT:** Blinton, Alcott, Brown, Cotton, Dent, Drake, Shepherd, Newton, White.

**ABSENT:** Ebers, Winters.

**MINUTES:** June 5, 19___, minutes, page 2, line 17, were amended to read "the finance drive total was $665," instead of "$645." Motion to approved the minutes as amended by Binton, seconded by Alcott. The minutes were then approved as amended.
TREASURER - Kathy Dent (Report on File)
September 1 balance $1,495.78. Income for the month $325, expenditures $450, including the third PMP to LWVNYS of $212.50, leaving a balance of $1,370.78 as of September 30. Dent reminded board members to submit their expenses for reimbursement.

ANNOUNCEMENTS: Invitation from Chamber of Commerce to attend an all day conference on citizen involvement in government was read. Payment of a registration fee of $15 for two board members was authorized; others may attend on their own.

MEMBERSHIP - Mary Cotton
Membership last year 140, current membership 145. There are five new members this month and 2 drops. Prospect list of 25 is receiving the monthly bulletin. Orientation meetings for 15 new members and several others scheduled Oct. 14, 8:00 PM; Oct. 15, 1:00 PM. Sheet for board help circulated. Meetings at charter member's home - Mrs. Brisco, Devon Rd.

PUBLICATIONS - Ruth Drake
Publications service was described for new board members since it had been omitted from the board orientation for lack of time. Drake called attention to the newly printed *Action for New York*. The board discussed the idea of cooperation among public relations, publications and program directors for better promotion of useful League publications. Drake will submit a plan in November.

PUBLIC RELATIONS - Estelle Brown
Brown reported that the *Daily Times* did print a story on the high school students attending LWVNYS Legislative Conference, but there was no success in getting the newspaper story on the new study of urban renewal. Barbara Tate suggested that the PR committee meet with the urban renewal committee before the next board meeting to see if a plan could be worked out for developing community understanding. Tate will set this up.

VOTER SERVICE - Betty Shepherd (Report on File)
An indecisive interview with Henry Mencken, the managing editor of the *Daily News*, was held re: publication of candidates' questionnaires. It was agreed that there must be a clear understanding with the paper before the work of collecting candidates questionnaires begins. Shepherd will follow up, with a decision to be made no later August 20. An order for 25,000 FFV has been placed, including an order from the Marion Steam Shovel Company and another from the State Bank of the Finger Lakes, totaling 15,000. It was agreed that the demand for election material this year is heavy and that we should get more FFV if available.

LOCAL PROGRAM - John Newton
There was a disappointing turnout of three at the first meeting of the new local item committee despite great interest at the annual meeting. There was a brief discussion of steps to take - calling new names secured from membership interest records and offering rides; better time for meetings; serving food to make it an enjoyable social occasion as well; laying out tentative plans and asking each potential committee member what part he/she would like to undertake. Newton will follow up on these suggestions. Next meeting scheduled for October 11.

After discussion Newton MOVED that "urban renewal reference materials, not authorized in the budget, in an amount not to exceed $20, be purchased for the use of the committee." SECONDED and CARRIED 6-2.
APPORTIONMENT - Judy Lane (Report on File)
Three units, attended by 32 people, agreed that population should be determining factor in one legislative house. Twenty-seven of them had attended the previous general meeting. The fourth unit was very vocal, very divided, and resorted to a count: 4-one person, one-vote, throughout; 5-population, 1 house; 6-just don't know. The board further discussed the prevailing opinion in the League. Lane MOVED that the League report to the state League its consensus on population as the determining factor in one house. SECONDED and CARRIED 5 yes, 3 no.

JUDICIAL - No report this meeting.

IR - Jane White
White asked the board's permission to act with the United Nations Assoc. and AAUW to plan for UN day. After determining that the groups were those customarily involved in such observances, the director was so authorized.

BULLETIN Deadline - Saturday, November 4.
Patricia Ebers sent word by Brown that she needed material about plans for Community Day in connection with the business finance drive. It was suggested that the bulletin carry new members' names each month. Brown will take the ready bulletin material and this suggestion to Ebers.

ADJOURNMENT - 10:40 PM

RESOURCES
- Welcome to the League (LWVNYS): Contains general information about the League.
GUIDE FOR BOARD ORIENTATION

Every League board should schedule an annual board orientation meeting. A thorough orientation gives new board members greater confidence in carrying out their responsibilities and minimizes problems for the board later on. Provide this orientation with local League experienced personnel, or request the state League liaison or membership vice president to assign a trainer to lead the discussion.

Plan to hold the board orientation as soon as possible after the new board is formed. See that board members have the files and tools of their predecessors and that they look at them before the meeting. Each should also have League Basics (In League (LWVUS), appropriate information from this In League in New York State: A Guide to Managing Local Leagues, For the New (and Not So New) Board Member, and a copy of Welcome to the League (LWVNYS).

POINTS TO BE COVERED
I. Nonpartisan Political Policy (Bylaws: Article II, Sec. 2)
   A. Discuss why it is necessary
   B. Review League Basics and section dealing with nonpartisanship in In League in NYS.
   C. Review current policy
   D. Discuss responsibility of board members to bring problems of individual nonpartisanship to board

II. The Role of the Officers
   A. The president
   B. The vice-president
   C. The secretary
   D. The treasurer

III. The Role of the Board - a board member's twofold responsibility
   A. Total board responsibility
      1. To advance League goals
         a. Voters service/citizen information
         b. Program - study, discussion, consensus, action
      2. To plan and guide League policy
         a. Set goals and priorities
         b. Schedule activities (calendar planning)
         c. Make all policy decisions
         d. Approve plans of committees
         e. Review and evaluate
      3. To promote membership growth and involvement
         a. Provide variety of opportunities for participation (spot jobs, study groups, action campaigns, administrative committees)
         b. Provide oversight and assistance in recruitment and orientation
         c. Be certain the year's activities will provide a satisfying membership experience
      4. To manage finance matters and keep the League fiscally sound
         a. Help plan and assist with finance drive (both member and community)
         b. Watchdog monthly expenditures and income
         c. Know what the budget allocation is for portfolio
         d. Meet state and national (and ILO, if applicable) PMP obligations
      5. To determine consensus
a. Role of committee
b. Role of board

B. Individual Portfolio Responsibility
   1. Form a committee
   2. Pre-plan with committee
   3. Present proposed plans to board
   4. Give periodic progress reports to board
   5. Carry out board and membership decisions
   6. Be up-to-date on publications in the field
   7. Keep a notebook or file for present use and future reference. This should include job
description, plans, reports and action, and other materials which facilitate turning over of
portfolio to a substitute or successor

IV. Board Meetings
   A. Written agenda, with estimated timing, sent out ahead of meeting
   B. Parliamentary or at least business-like procedure
   C. Importance of attendance or proper notification if knowing you will not be able to attend
   D. Full discussion and consideration of all proposals
   E. Policy-making and exchange of information. No committee work
   F. Full minutes taken for reference
   G. Begin and end on time
   H. Clear assignment of responsibility
   I. Evaluation of League activities

V. Interrelationships
   A. Among neighboring Leagues—program cooperation, shared administrative jobs, possible
examples being joint bulletins, fund raising, voters service and publications ordering.
   B. Between local, ILOs (where they exist), state and national boards
      1. Sending in bulletins, bylaws and program proposals
      2. Suggesting candidates for nomination
      3. Sharing information and techniques
      4. Attending national and state conventions and council
      5. Asking for assistance with problems and concerns
BEST PRACTICES - SUGGESTED GUIDELINES FOR LOCAL LEAGUES

June 2007, League of Women Voters of the United States

In this listing of best practices, items 1 through 7 are the official requirements for Leagues as voted by the 1994 LWVUS Convention. Following each item is suggested implementation — the optimal level of operation.

1. **The League must have bylaws, the first three articles of which must be consistent with those of the LWVUS. The remaining articles must provide for democratic procedures.**

   **Best practices:** A League committee reviews the bylaws to check actual practice for conformity and to consider possible amendments prior to the annual meeting.

2. **The League must establish and maintain a nonpartisan policy.**

   **Best practices:** The League board reviews and discusses its nonpartisan policy annually at its first organizational meeting. At a minimum, board members who hold “sensitive” portfolios are not involved in partisan activities. Each League considers its own community and its political environment when stating specific allowed and prohibited activities. The board’s policy may be printed in the local League newsletter.

3. **The League must hold an annual business meeting of the membership.**

   **Best practices:** The League holds an annual business meeting of the membership to adopt a budget, bylaw changes, and local programs and to elect officers and directors. In order to encourage member attendance and participation, there is a “special” aspect to this meeting — a speaker, an award to a member or community leader, and/or a time for attendees to socialize.

4. **The League must hold regular board meetings.**

   **Best practices:** The League holds regularly scheduled board meetings with written agendas and minutes distributed ahead of time. For better and more efficient meetings, a timed agenda is used, which provides opportunities for developing plans, acting on committee recommendations and evaluating progress and results.

5. **The League must meet its financial obligations to the state and national levels of the League.**

   **Best practices:** The League budget provides (either through dues or fundraising) for the League’s per member obligations to the state and national levels of the League, and payments are made promptly.

6. **The League must have a plan for membership growth and retention that encourages a membership as diverse as the community.**

   **Best practices:** The League develops and implements a written plan, with attainable goals and specific strategies, to increase its membership and to achieve diversity in members, leadership and program. Board members always carry membership information with them, ask others to join, and promote the League at every opportunity.

   The board adopts a board policy that affirms a commitment to diversity. The League plans outreach to a variety of groups in its community through networking, coalitions, joint projects, and other collaborative efforts. In order to promote retention of current members, the League provides a variety of opportunities for them to participate in deciding and carrying out League activities and goals. Annual
renewal notices are sent out several months in advance; personal phone calls and other methods of contact are used to follow up with those who have not responded prior to the due date.

Nationally recruited members (NRMs) receive a letter of welcome and are included on the bulletin mailing list. Well in advance of notice from the LWVUS that their membership is due to expire, the League invites NRMs to renew at the local level.

7. **Any advocacy pursued by the League must be consistent with League principles, positions and policies.**

   **Best practices:** The League sets priorities for timely action on local positions before taking action. The League responds to action alerts from other levels of the League and encourages grassroots member involvement in action where appropriate. The League president (or designee) is the official spokesperson for the League.

   The League has developed an understanding of the appropriate level of government at which action may be taken and, if in doubt, consults with the state or national League office. When appropriate, the League coordinates action with other affected Leagues.

   The League informs its members and the community of action taken through a variety of means (e.g., electronic media, newspaper articles, fact sheets).

**Items 8 through 19 describe characteristics of healthy Leagues, followed by suggested guidelines for optimum practices that League boards may decide to adopt.**

8. **The League sets priorities, develops plans and evaluates activities.**

   **Best practices:** The board holds an organizational meeting after the annual meeting to plan the League calendar for the year ahead. Priorities are set so that the League can focus on a limited number of activities. Plans are developed that include an outline of activities and the board member/committee responsible for each. The board’s responsibility includes an evaluation of each activity. Plans and evaluations are included in written reports submitted to the board for use in future planning.

9. **The League has a membership sufficient to maintain League viability.**

   **Best practices:** The League has a membership chair and committee that develop a plan each year to attract new members and to encourage their participation. League leaders are assigned specific new members to make contact with them and encourage their involvement. The president makes a welcoming phone call to each new member.

   New members are invited to a special program to orient them to the League’s basic organizational structure, history, present activities and opportunities for member participation.

   The national League member database is updated regularly. A local membership file is updated regularly with information on members’ special interests, achievements and League involvement; this file is shared with the nominating committee as positions need to be filled.
10. **The League holds regular membership meetings.**

   **Best practices:** Regularly scheduled meetings are held on issues of League concern or under study. These meetings are both informative and participatory for members. The League provides opportunities for members to interact socially as well.

11. **The League carries out citizen education/voters service activities.**

   **Best practices:** The League works to increase citizen participation in the election process on all levels by undertaking election-related voters service (e.g., registration drives, get-out-the-vote campaigns, election guides, candidate forums).

   The League undertakes citizen education efforts on issues of importance to the community, not necessarily ones on which the League has positions. This can take the form of holding public forums, distributing fact sheets or publications, running media campaigns, or organizing discussion groups. Such activities are often done in cooperation with other organizations.

12. **The League establishes positions on public policy through member participation and agreement.**

   **Best practices:** The League participates in study and consensus meetings on state and national program. When possible, Leagues share responsibility for study committee activity and consensus meetings with neighboring Leagues in order to lessen the workload on individual Leagues.

   The League has a plan for periodic review of its local program positions and updates its membership on these positions through meetings or newsletter articles.

13. **The League publishes a newsletter.**

   **Best practices:** The League has a method of regular communication with members. It distributes its newsletter to appropriate community leaders and to prospective members. To facilitate a uniform image of the League, the newsletter is called The Voter and features the League logo.

   The League newsletter includes schedules of meetings, information on League positions, action alerts, and any other items necessary for a member to be informed and to act effectively; it avoids reprinting information from every-member League publications (e.g., state and national Voters). The newsletter contains a welcome to new members with a brief write-up on each one.

14. **The League practices sound fiscal management and adopts a budget.**

   **Best practices:** The League treasurer prepares written reports for the board at least quarterly and reports annually to the membership. The League has written policies regarding responsibilities for fiscal decision-making. League financial records are reviewed or audited annually. The League aggressively pursues fundraising income from members and the community.

   League budgets are set to provide adequately for the implementation of League program and activities. The League’s budget committee recommends the adoption of a budget that reflects the League’s priorities for the year and basic support for operating the League, including attendance at state and national conventions and financial support for the state and national Leagues.

15. **The League sends representatives to regional, state and national League meetings and to training opportunities.**
Best practices: The League encourages all members, especially current and potential board members, to attend workshops, conferences, councils and conventions to increase skills and broaden knowledge to enhance the work of the League. Funds to cover at least a portion of delegate expenses are included in the budget.

16. The League encourages flexibility of its administrative structure.

Best practices: The League modifies its board structure, as needed. The League makes an effort to reduce time demands on board members, emphasizing the policy-making role of the board. The League schedules meetings to accommodate both the board and members’ work schedules.

17. The League submits reports to state and national Leagues as requested.

Best practices: The League president takes responsibility for completing report forms on time or requests the appropriate board member to do so, checking on the follow-through.

18. The League has an active nominating committee.

Best practices: The committee is active throughout the year, working to ensure the vitality of the League by identifying the leadership potential of new and continuing members. The committee encourages board members to mentor and train upcoming leaders in order to build a leadership bank.

19. The League has high visibility in the community.

Best practices: The communications chair is chosen for writing ability, energy and enthusiasm for the League and League activities. Conscientiousness, persistence and creativity will increase the League’s visibility as media responds to efforts to secure coverage in all forms of print and electronic communications, including calendar listings for programs and events. Media may include cable TV, community access and municipal TV stations, college TV and radio stations, trade association publications, bulletin boards and postings, neighborhood and minority newspapers and other communication vehicles important to the community.

Photographs of League events accompany news articles and appear in the local papers whenever possible. League members not on the board are included in these photographs. Letters to the Editor are frequently used to inform the public of local, state or national League issues. All League news articles close with information on how to join the League and whom to contact for further information on the subject of the article.

The League is listed in the local phone book, has an email address and a website, and has either an office or a post office box.

The League’s website is useful to members and the public, well-designed, easily navigable, well publicized, and updated regularly. Opportunities to link the League’s website to allies, coalitions, cosponsors, partner organizations, media sites, and government (election/auditor) websites are explored in order to further the reach of the League and to make contacting the League easier and more convenient.
LOCAL LEAGUE REQUIREMENTS
Revised June 1994 (LWVUS)

- The League must have bylaws, the first three articles of which must be consistent with those of the LWVUS. The remaining articles must provide for democratic procedures.
- The League must establish and maintain a nonpartisan policy.
- The League must hold an annual business meeting of the membership.
- The League must hold regular board meetings.
- The League must meet its financial obligations to the state and national levels of the League.
- The League must have a plan for membership growth and retention that encourages a membership as diverse as the community.
- Any advocacy pursued by the League must be consistent with league principles, positions and policies.

LOCAL LEAGUE STANDARDS
Revised June 1994 (LWVNYS)

- Accomplish at least one voter service activity per year.
- Accomplish one or more program activities per year (study, action or public information)
- Develop regular communication with members, to keep them informed and able to act effectively.
- Hold regularly scheduled membership meetings in addition to board and annual meetings.
- Participate to the fullest extent possible in state and national sponsored training conventions and meetings.
POLITICAL
YET NONPARTISAN
NONPARTISAN POLITICAL POLICY AND LOCAL LEAGUE BOARDS

"The League shall not support or oppose any political party or any candidate."
- Article II, Sec. 2, LWVUS Bylaws

It is clear from the above bylaw of the national League that a League may not support or oppose any political party, any candidate for elective office, any office holder or any group which supports candidates.

It is the responsibility of each local League board to formulate and adopt its own nonpartisan policy which conforms to this bylaw, and to determine the limitations to be placed on board members' activities to maintain the League's nonpartisanship. Each year the board should review its own policy and, if necessary, adapt the policy to suit the particular needs of the time and community. Even if no changes are necessary, the review is important, both to educate board members and to clarify areas which might otherwise cause confusion later in the year.

The board should discuss its nonpartisan policy at the first board meeting after the annual meeting. League Basics (In League): (LWVUS) is a helpful reference. During their discussion board members should keep in mind the following:
- The League's credibility as an effective political organization in the community
- The sensitivity of specific board portfolios (i.e., president, voter’s service, etc.)
- The extent to which the public identifies a board member's activities with those of the League political climate and traditions in the community
- The visibility associated with specific political activities
- The possible effects on neighboring Leagues who share the same officials
- The possible effects on the ability of League lobbyists at any level to function effectively.

DISCUSSION OUTLINE
I. Purpose of League's nonpartisan policy

Nonpartisanship toward candidates and political parties is critical to the effectiveness of the League's unique voters service/citizen information work. It also provides a strong foundation for the work done in support of issues. Action on legislation and ballot proposals is more effective when the public and the legislators believe that the League's conclusions are based on merit rather than politics.

II. Applying the nonpartisan policy at the local League level

Discuss each aspect of potential policy and refer to the criteria suggested by LWVUS. It is much easier to make sound decisions when dealing within a framework of consistency and common sense. Don't try to build a policy statement around an individual case. If there has been an instance of "conflict of interest" on the board in the past year or so, or one is anticipated, this will surely come up during discussion. It may provide some useful guidance as to the kind of policy decisions which will fit each situation best; a final nonpartisan statement should be rooted in principle rather than constructed around individual problems.

Part of local board policy was determined by the 1972 LWVUS convention which pointed out specifically that:
- The political activities of a spouse or relative of a board member should be considered separate and distinct from the activities of the board member;
- Public notices released by a League announcing the resignation of a board member to run for political office should be carefully worded to avoid the appearance of endorsing the resigning member's candidacy; and,
- The League's nonpartisan reputation is strong enough to ensure that personal gifts from office holders or candidates can be accepted without being misconstrued as endorsement of the donors. Local Leagues, however, cannot accept funds from member items in the state budget.

Determine what limitations should be placed on board members seeking or holding elective or party affiliated offices (such as committee person or elections inspector). Although LWVUS’s bylaw mandates that local board members not run for elective office, considerable leeway is allowed in defining "elective office." (See League Basics (In League.)

- Are there exceptions dependent on the visibility of a particular board member?
- Should off-board members who are closely identified with the League be required to meet the same criteria?

Determine what, if any, limitations should be put on board members who participate in the following activities:
- Making financial contributions to candidates and/or political parties;
- Participating in behind-the-scenes efforts for candidates, such as telephoning, stuffing envelopes, writing position papers, etc.;
- Publicly supporting a candidate for partisan political office;
- Circulating or signing nominating petitions, referendum petitions;
- Attending coffees or other gatherings to meet candidates;
- Holding coffees for candidates seeking political office and/or nonpartisan office;
- Attending fundraising functions for candidates or political parties;
- Holding an appointive political office.
- Holding office in another organization which supports or opposes political parties or candidates.

Determine what limitations should be placed on ads accepted for local League publications. The following LWVNYS board policy is offered as an example:

"Ads accepted for state League publications should indicate support for the League and should not solicit or suggest support for a candidate or political party. If advertising is received from a candidate or political party, a statement should appear on the same page stating that the League does not support or oppose political parties or candidates. Such ads should not appear in the two-month period prior to election."

After discussing each consideration and reaching agreement, have the recording secretary read back that which has been agreed upon. When starting from the very beginning, appoint three or four board members to write a nonpartisan policy statement based on the areas of agreement and bring it to the next board meeting for approval. If amending an existing policy, amend it at the same meeting. The 1972 national convention encouraged a positive approach, recommending that guidelines should emphasize what board members may do, rather than what they may not do.

After approval, all board members should have copies of the statement. Nominating committee members should also have copies and should alert prospective officers and directors to the nonpartisan responsibility of
each board member. The policy should be published in your bulletin. Remember to send a copy to your state League office annually.

III. In Conclusion

The nonpartisan policy governs League activities and limits board members activities. However, individual members who are interested in the political process are encouraged to participate fully in party activities.

As long as the League does not endorse candidates or political parties it is nonpartisan. However, the League's nonpartisan stance does not mean that the League should not get involved in controversy on issues it has chosen for study, consensus and action. A League will be a strong and effective political force to the degree that it can accept controversy, live with uncertainty and not use its nonpartisan political policy as a shield for not getting involved.

NONPARTISAN POLITICAL POLICY

For Members of the Board of the League of Women Voters of NYS

The League of Women Voters of New York State is a nonpartisan organization which does not support or oppose candidates for public office but does encourage its members, as individuals, to participate actively in the political process. The League acts on those issues the membership chooses for study and action.

The state board believes that League members should be encouraged to seek and accept elective or appointive office in government. However, at the same time, state board members recognize that, as a result of their close identification with the League, they have a special responsibility to see that their activities do not create a partisan impression or compromise the nonpartisan policy of an individual board member's local League. Therefore, the LWVNYS imposes the following restriction in order to preserve the nonpartisan nature of the organization.

State board members shall not run for any elective partisan office.

Members of the board of directors of the League of Women Voters of New York State:
- Shall not hold office in a political club or engage in partisan activity or serve on a campaign committee, or have their names listed for making contributions.
- May hold appointed positions on state, county and local boards and commissions.
- May attend (but not host) fundraising events.
- May serve on other boards. However, any conflict arising between the two entities should be brought to the attention of the state board.

State board members shall bring the question of any prospective activity which may have potential conflict to the board for consultation.

The political activities of a spouse or relative of a board member are considered separate from the activities of that board member. However, in the event that a board member's spouse or close relative runs for national, state, or local office or party position, the board member shall consult with the board or executive committee about their level of involvement in the campaign.

(Adopted by the board of directors 6/4/95; revised 7/11/98; revised 3/12/2008)
SAMPLE
NONPARTISAN POLICY STATEMENT FOR LOCAL LEAGUES

From LWV Ohio

The League may take action on governmental measures and policies in the public interest. However, it shall not support or oppose any political party or any candidate. [This first sentence must be included in every non-partisan statement. The following represents expansion of this sentence as circumstances arose in this sample state policy.]

Recognizing that the League experience uniquely equips members for public life and wishing to encourage members to utilize their knowledge and abilities, non-board members are urged to participate fully in party activities (on an individual basis). Board members' activities must be limited to preserve the League's nonpartisan position.

All board members shall not run for or hold elective office. If a board member declares for an elective office, the member must resign from the board.

Public notices released by the League announcing the resignation of a board member to run for political office should be carefully worded to avoid the appearance of endorsing the resigning board member's candidacy.

Board members shall not undertake any action which will cause them to be identified publicly as supporting any candidate for office or any political party. The president, voter service director and holder of any other board position deemed sensitive shall not participate in any political campaign in any way. Other board members shall not chair or administer fundraising or political campaigns, chair campaign events, or work in a significant way in the campaign of a candidate.

A board member may serve on any public board, commission, committee, or coalition; however, that board member does not represent the League unless officially designated as a League representative by the League board.

A board member may not speak or in any way work against a League position.

The political activities of a spouse or relative of a board member are to be considered as separate and distinct from the activities of the board member.
SOME RANDOM THOUGHTS ON NONPARTISANSHIP

No matter what the League does, it is sometimes accused of being partisan. This is inevitable with expanding positions in controversial areas.

The first sign of trouble often appears in connection with Voter Service activity. For example, a political party might refuse to cooperate with a League on a Candidates Meeting or refuse information for a Voters Guide or point to the fact that the League supports a particular ballot issue. The finger is pointed at a League member who has been involved in action on a League position that is identified with a party position in the community or at someone who has gone on from League to run for political office. The political party might claim that the League is really a front for another party. Moreover, the League has been accused of having a closed mind, of arriving at positions without listening to the opposition.

Unfortunately these charges may have an element of truth in them. It is important to arrive at positions with full backing of the membership, to understand how positions came to be part of program, and to be sure that the community understands this. Because it is possible to appear to be partisan, it is particularly important to be sensitive to the matters which might be highly political in local League areas.

First, the League does not back down on positions because they are unpopular. They can be handled in a number of different ways. One extreme is for the League to do nothing, to pass; but unless this is the best way to accomplish League goals in the long run, it is seldom the choice. It is always possible to print a fact sheet showing both sides of a problem; it is possible to hold a forum. The best results come from long and careful planning.

For example, in choosing League leadership, do the nominating committee and the board consider whether the President, Voter Service Director or director of a sensitive item might leave the League to work actively for partisan activities? What is the reputation of a nominee in the community? Is the membership as broadly representative of the community as possible? Or are whole segments of the population with different social and economic backgrounds left out?

Consider how well the League's record of nonpartisanship is established in the community. Has the League worked with groups in the community that do not agree with it? At membership meetings, are new or different ideas heard and groups shut out, making the League seem partisan.

Once the League has chosen good leadership, planned action wisely, and is on firm ground, there is no need to be upset by charges of partisanship. The most often used tactics are intimidation and threats. (I won't come to your Candidates Meeting; I won't meet with you; I am going to the newspapers; etc.) But when the League has followed its own rules, remained polite but firm, it has usually managed to gain the needed cooperation. Don't be scared off by bluster.

If the League is charged with being partisan there is no need for panic. Try to meet with those making the charges and ask them to explain their grievances. Their information may be faulty or they may not understand the League's policy. Explain the difference between League program and Voter Service activities.

If local Leagues have thought through their positions carefully, they are on solid ground and can stand firm with conviction. The League, like the candidate, also has recourse to public opinion.
BYLAWS:  
HOW THE LEAGUE GOVERNS ITSELF
REVISING LEAGUE BYLAWS

JOB DESCRIPTION: BYLAWS COMMITTEE CHAIR

OBJECTIVES: To review local League bylaws and recommend changes for annual meeting approval. To review state and national League bylaws and recommend changes.

RESPONSIBILITIES:

1. Chair the bylaws committee. Arrange for meetings of the committee.
2. Provide opportunities for League members to suggest possible bylaw changes.
3. With other members of the committee, review bylaws and proposed suggestions. Present recommendations to board for approval.
4. Send to the liaison or membership vice president the recommended bylaws changes that have been approved by the board.
5. Report proposed changes to the members, meeting the deadlines imposed by the bylaws.
6. Present proposed changes to the annual meeting. Following the meeting, send a copy of the revised bylaws state League office and membership vice president.

Local Leagues should review their bylaws from time to time. Procedures for amending bylaws are set forth in the bylaws. Since bylaws must be submitted to the membership in advance of the annual meeting, a local League wishing to make changes must begin well in advance of the annual meeting.

The local League board appoints a committee to review the bylaws and to propose any changes. The Committee should:

- Review the League's bylaws to be sure that the first three articles conform to the first three articles of the national League bylaws and that the remaining articles provide for democratic procedures;
- Should solicit suggested changes from the board and from the membership at large; and
- Recommend any proposed amendments to the board for approval.

Any recommended bylaws changes should be mailed to the membership ahead of the annual meeting and should be considered for action at the annual meeting, as provided in the bylaws.

In presenting the proposed changes to the membership:

- The entire section being revised should be quoted;
- Use parentheses to indicate deletions;
- Underline new wording, new punctuation; and
- Give an explanation of the proposed changes.

The chair of the committee presents the proposed amendments at the annual meeting. Adoption at the annual meeting usually requires 2/3 vote (as spelled out in your bylaws).

The original adoption date as well as the dates of all revisions should appear on the front page of your bylaws.

The bylaws chair or a board member should send the proposed changes to the membership vice president prior to submission to the membership and should also notify her when the changes are adopted. The membership vice president should be consulted if a local League has any question about the bylaw change.
NOMINATING LEAGUE LEADERS
NOMINATING LEAGUE LEADERS

JOB DESCRIPTION: NOMINATING COMMITTEE CHAIR

OBJECTIVES: To provide a slate of nominees for officers and directors for approval at the annual meeting.

RESPONSIBILITIES:
1. Chair the nominating committee.
2. Be familiar with League job descriptions, board responsibilities and the League's nonpartisan policy.
3. Provide opportunities for League members to suggest possible nominees. With other members of the committee, solicit additional suggestions through personal contacts and attendance at League functions.
4. With other members of the committee, review names provided and obtain additional information regarding possible candidates, if necessary. Oversee the preparation of a slate of possible nominees.
5. As a courtesy, report proposed slate of nominees to the board; the board does not act on the proposed slate.
6. Report proposed slate to the members, meeting the deadlines imposed by the bylaws.
7. Present proposed slate of nominees to the annual meeting.
8. Maintain records to be used in the filling of board vacancies as they occur and to be passed on to the succeeding nominating committee.

The work of the Nominating Committee is the most important job in the local League. Your committee's recommendations can:
- Determine your League's future - for the next several years to come;
- Introduce new faces, new ideas, a spirit of creativity and diversity;
- Confirm a system of leadership development;
- Send a message - "This board is open, vital, moving forward";
- Announce - "There is no ownership here"; and
- Say - "We want you, the membership, to participate."

COMPOSITION OF THE NOMINATING COMMITTEE
The committee is responsible to the League membership as a whole rather than to the board. The size and composition is set forth in the local League bylaws. The majority of the members, including the chair, are elected by the membership at the annual meeting and the remaining members are appointed from the board after the annual meeting. The Committee chair is an off-board position. The League president is not a member of the nominating committee, even in an ex-officio capacity.

Members of the nominating committee should be objective, realistic but persuasive, and have the ability to analyze people and their talents. They should understand and be able to explain the responsibilities of a board member and how the League functions. They should be clear about the local League's nonpartisan policy and League positions. It is each member's responsibility to attend some board meetings, all committee meetings, to accept responsibilities requested by the chair and, above all, to respect the confidential nature of the committee's business.

Preliminary Responsibilities of the Chair:
Prior to the calling of the first committee meeting, the chair should:
1. Obtain the list of offices to be filled from the president. The expiration dates of each position are important, especially where unexpired terms are to be filled.
2. Draw up a time line for the committee's work, starting with your annual meeting and working backwards. Be sure to check your local League bylaws for deadlines.
3. Get the portfolio from your predecessor to learn whom the committee considered last year, who said, "wait one more year," suggestions (positive/negative). Remember, all information is confidential.
4. Be familiar with local League bylaws, job descriptions, current/past board lists, League membership roster. Lists of leadership persons from schools, local church groups, clubs and civic organizations can be helpful.
5. Share these resources with committee members before the first meeting.
6. Speak with the president and membership chair to learn as much as possible about the persons with whom they've worked, the membership chair is an asset to the nominating committee because of her knowledge about the current members and her many contacts in the community.
7. Attend board meetings; become familiar with board responsibilities, individual capabilities and the way the board works as a whole.
8. Request suggestions from the general membership at meetings, through the bulletin; give names, telephone numbers of all committee members so they may be contacted about potential candidates.

Suggested Steps and Timetable - At the committee's initial meeting:
1. Establish guidelines; i.e., confidentiality of information, the protection of the nonpartisanship of the League, goals of leadership development, diversity.
2. Set the timetable for the committee's work and restate the expectations for participation of all members.
3. Assesses the strengths and weaknesses of the current board.
4. Discuss characteristics the committee should look for to compliment the current board profile; i.e., strong leadership/less controlling leadership, balance between younger, more experienced members, diversity, etc.

Above all, do some dreaming; set your goals on dynamic, creative community leaders who can enhance the League with their abilities: set high expectations for the board of the future League.

The selection process:
List all the individuals the committee would like to consider for board positions and their possible roles. Although the nominating committee doesn't select persons to fill portfolios, it is essential to have key individuals capable of handling the most vital League positions; i.e., issues, voters service, membership. (These may, traditionally, be vice presidential roles in some Leagues.)
1. Pragmatically, start at the top if you must find a new president or with an executive position which will be most difficult to fill.
2. Discuss strategies for approaching a series of candidates in a sequence which will not unduly impede the ongoing work of the committee.
3. Decide how prospects will be approached and which committee member might be the strongest advocate. The chair does not have to ask each prospect to serve.
4. When offering a position to a candidate, outline the duties; don't undersell the responsibilities but be positive. Stress the fact that each position can offer a good learning experience, that the League is fun and is the basis of lasting friendships.
   a. Remain positive, upbeat; don't let a candidate flatly say "no." Offer to meet with them; suggest they talk with the current president or a board member; give them time to think it over and plan a return call.
b. You may disclose the names of individuals who have agreed to serve but don't discuss potential prospects.
c. Candidates who have refused to serve should be urged to keep the offer and their refusal confidential.

5. Proceed working until the committee has a completed balance slate.

Presentation of the Slate
The completed slate is announced by the chair at the board meeting prior to its publication in the bulletin. Local League bylaws establish the timing for publication of the slate, in relation to the date of the annual meeting.

The committee chair presents the slate to the membership at the annual meeting. Alternate candidates/slate may be nominated from the floor at the annual meeting according to the process described in the local Leagues bylaws.

Maintaining Committee Records
An annual record should be maintained containing:

- List of positions to be filled and dates of terms;
- Names of the committee members;
- The League bulletins soliciting names of potential candidates and the announcement of the proposed slate;
- A listing of those candidates approached and their reasons for refusal; and
- Do not record confidential information.

Following the annual meeting, the nominating committee files should be completed and turned over to the new chair to be used throughout the coming year, at the president's request, to suggest names of vacancies due to resignation or reassignments.
MEMBERSHIP
RESOURCES
LOCAL LEAGUE MEMBERSHIP DIRECTOR JOB DESCRIPTION

REPORTS TO: Local League Board

OBJECTIVES: Marketing membership by directing the recruitment, retention and involvement of members in the League

NOTE: Membership is the key to League success. Below is a summary of guidelines recommended for the local League Membership Director. The national League is continuing its Membership Recruitment Initiative (MRI). Many of its ideas have been incorporated into these State materials. At the end of this document are RESOURCES that expand on items presented below.

RESPONSIBILITIES:
1. Appoint at least 2-3 non-board members to work with you as a TEAM to develop a membership PLAN for events and activities that attract new members and retain those who have joined. [See guidelines below]
2. Since membership recruitment is the responsibility of every board member, encourage board members to assist with membership efforts.
3. Develop methods of involving all members. Plan with your bulletin editor and board to send out materials and information all members should know and have.
4. Review flyers and pamphlets available to provide information about the League to prospective and new members
5. Maintain and update a database of League members including name, address, e-mail, telephone and cell numbers, interests and skills. Share this information with your treasurer to assist with dues collection.
7. Keep in touch with your state and national membership directors either directly or through your regional director or the State Board Report to be up to date with the latest materials and ideas for recruiting and retaining members.
8. Assist your board’s nominating committee with recommendations of members to serve on committees and the board.

NOTE
Two principles should be included in every effort: Be Visible; Ask.
DEVELOPING A MEMBERSHIP PLAN

1. Start with considering why members join and incorporate these ideas into your plans. Surveys indicate most people join because:
   a. They like League people—intelligent, friendly, and community minded.
   b. They want to know more about their community and state.
   c. They want to make a difference in society.
   d. They want to make contacts with people in power.
2. Review membership statistics for past few years. Analyze trends. Determine why members have dropped/joined. Does your League reflect the demographics of your community in age, race, political interests, etc.?
3. Develop a survey which will describe your group (age, interests, working or not, best time for meetings, etc.).
4. Set your goal. It should be ambitious but reachable. Target a new population, keeping in mind the importance of diversity. Be specific and tailor your materials and events to attract this group.
5. Appoint a coordinator for each activity, set up committees, assign responsibilities, and determine a timeline.
6. Define what you are trying to sell and design a campaign that includes:
   a. The event or activity. Consider co-sponsoring meetings with other groups.
   b. Prepare membership materials. Brochures, new member information, flyers. All events and publications should provide an easy opportunity for joining the League. “The Ask”
   c. Design publicity plan to reflect what you want to emphasize, such as: opportunities for learning without previous experience or background, friendship and fun, networking, development of personal skills and political awareness. “Visibility”
   d. Decide on a budget.
   e. Discuss this plan with your board to solicit their approval and suggestions.
   f. Enlist the support and participation of your current members. Solicit names of prospective members from them and other organizations. Follow up promptly on all leads.
7. Evaluate each activity after it has occurred.

ATTRACTING PROSPECTIVE MEMBERS

1. Evaluate how prospective members can reach the League. You must have a League phone number and answering machine. Make sure the League is listed as a community organization in the phone book. Consider renting a post office box for use as a permanent mailing address. Use both local League and State E-mail and Web sites where available. (LWV NYS E-mail: lwvny@lwvny.org / Web site: www.lwvny.org)
2. Make sure your website navigates to the “become a member” location easily. Is your site linked to others, to the right search engines, and do research librarians know about it? Call or visit the library to see how they find information about your organization.
3. A phone call is imperative once prospective members have contacted the League. Sound out his/her League interests and invite him/her to a meeting or other event. Send a small packet of information and a membership brochure. Put the person’s name on the mailing list for your bulletin for 3-4 months.
WELCOMING NEW MEMBERS

1. Integrate the member as soon as possible into the League process.
   a. Call the member to welcome him/her. Having the president call is very effective.
   b. Put the person’s name on the bulletin mailing list and send the name to the state and national Leagues so he/she starts to receive the mailings.
   c. Make a good impression by sending the new member a larger packet of materials including a welcoming letter from the local League president, a board list, a membership list, program information and the booklet from the state: “Welcome to the League”. Also consider including a calendar of the year’s planned activities, a small League item (pin, lanyard, bumper sticker), the operating rules(bylaws)and decision making procedures and a brief history of the League with a list of current action items.
   d. Send a questionnaire to find out about the member’s interests and time availability. Follow up to assure this is completed. Try to assign the new member to at least one activity upon receipt of the questionnaire. Many will participate if asked.
   e. Think of specific tasks particularly suited to new members.

2. Provide orientation in a variety of formats to suit the availability of the new member. Don’t be afraid to try new things and make sure there is time for them to ask their questions about the League. Provide concrete examples of the League’s work/successes, and share individual, personal stories about the League.

3. Consider assigning a seasoned “mentor” to the new member who will keep in phone contact throughout the first year and give first-hand insight and advice about League practices and actions and provide them with valuable history. Consider pairing people based on similar backgrounds or interests.

4. Some leagues designate one member or a committee of “new member ambassadors”. This person would welcome the new members, send them their packet of information, set them up with a mentor, answer any questions they have and keep track of their interests.

5. New members should be introduced at their first meeting and recognized by the whole membership at annual meetings. The local League president should make a point to reach out and call them when they join and thank them for becoming a member. This is another good time to ask what their interests are and to inform them about upcoming events.

6. A “satisfaction” survey after six months may help you identify any problems a new member may have as well as serve all members better.
RETAINING MEMBERS

NOTE: The greatest number of people who decide to drop their League membership have belonged to the organization for two years or less. The best way to retain members is to never have them consider dropping in the first place. New members will remain if:

- They feel welcome, accepted and needed.
- Their own personal needs and objectives are being met.
- They feel some sense of commitment to the organization.
- They are not overwhelmed with too much responsibility.

1. Build a system that keeps members informed about what’s happening. Send out email reminders the week of an event. Reminders to busy people can be quick and easy.

2. Make the most of the local bulletin:
   a. Write articles so members unfamiliar with League lingo, acronyms, and leaders’ names can make sense of them. Articles should convey enthusiasm for projects and encourage members to participate.
   b. Biographical sketches of new members introduce them to the membership. Acknowledge accomplishments with articles about members who have been with the League five, ten, or more years.

3. Arrange meeting times and locations for the convenience and comfort of your members.

4. Attractive meetings include:
   a. An agenda that outlines specific goals and assure attendees of the estimated timeframe in which items will be addressed. All will appreciate the organization and consideration of their time.
   b. A calendar at the beginning of the year keyed to member interests to allow them to plan accordingly and set aside dates when appropriate. This helps the Board and committees organize League events, maximize the media and community visibility, and recruitment opportunities in advance. LWVUS/EF has a national calendar that lists many important dates your League may want to consider placing on its calendar.
   c. Start and end promptly.
   d. Don’t forget the social aspect of meetings by offering food, a beautiful setting, a celebration of something special.
   e. Don’t forget those nametags.

5. Let all members know the jobs/functions needed to run the organization and have a list of needed in-kind contributions. Small tasks make people feel like they are contributing without being overwhelmed.

6. Continuously promote member benefits, both tangible and intangible, in your bulletin and other venues. Always, always, always make members aware that they are special and appreciated. Send thank you emails or notes to committee members.

7. Try surveying member interests at the beginning of the year after you create your calendar. Event leaders will have a better idea for who may want to assist with their event. It is an opportunity to ask what sort of tasks members would be willing to undertake throughout the year. You will see what topics would be of interest to your members that may not be covered during the year. This can be remedied early in the year, before interest drops.

8. Start the membership renewal cycle earlier. Renewal instructions that come earlier often mean better cash flow, renewal during the dues period, not the grace period. Mailed renewal packages must include: window envelope, return envelope and the dues invoice. Adding anything else will often delay return of payment.
NON-RENEWALS: DON’T GIVE UP

NOTE: Although it is discouraging when members drop from League rosters, your League does not have to be passive. Reach out with tactics listed below to ensure you have done everything possible to keep that person a member.

1. Analyze turnover by contacting non-renewals to ask why and to see if there are patterns so you can work on this aspect of your membership plan. Find out how long the person had been a member.
2. Personal contact with those whose dues are delinquent is critical. This lets the member know that he/she is valued as well as a chance to learn of their concerns, constraints and feelings about the League. Ask if they would reconsider. Have your local League president write a note or call the lapsed member and ask them to reconsider again and address their concerns.
3. Review with treasurer the timing of dues notices and subsequent reminders. Do they need rewording? Enclose a note with the renewal about how pleased you are that the person is a member and that you hope he/she renews.
4. Even if he/she does not rejoin after being asked three times, be sure to send a “thank you” or a “we’ll miss you” note or email. Sincere follow-up leaves the former member with a good impression of the League and would be more likely to support the organization in some other way.
5. Revisit your old member lists and who has dropped his/her membership in the past five years. Reconnect with a “we miss you” card or an invitation to an event.
Starting a New League
INTRODUCTION TO THE LEAGUE

What is the League of Women Voters [LWV]?  
The League of Women voters is a nonpartisan, grassroots political organization open to men and women of all ages. It encourages informed and active participation in government, works to increase understanding of major public policy issues, and to influence public policy through education and advocacy.

The goal of the League is to empower citizens to shape better communities worldwide. By joining the League, citizens can gain the information and skills they need to become effective participants in government. Belonging to an active local League offers additional opportunities to take part in the democratic process. For the organization as a whole, new members and new Leagues mean fresh ideas, innovative approaches to resolve public policy concerns, and ongoing sources of leadership.

The League of Women Voters’ nonpartisan policy states that the LWV neither supports nor opposes any political party or candidate for elective office, but does encourage its members as individuals to take part fully in the political process.

The League operates at the local, state, and national levels in every state, Washington, D.C., Puerto Rico, and the Virgin Islands. In New York State, there are over 50 local Leagues.

HOW IS THE LEAGUE ORGANIZED?  
Since the LWV operates at three levels, joining at one level automatically makes you a member of the other two levels. Members usually participate at the local level when they first join.

Described below is the structural framework for local Leagues throughout New York State, which provides the fundamental guideline for ensuring that the tri-level basis of LWV is consistent and the organization is able to function efficiently, provide services to each geographic community, and carry on the mission of the League throughout the state.

TYPES OF MEMBERSHIP  
Membership is open to any person who subscribes to the purpose and principles of the LWV. The LWV of New York State is committed to diversity, recognizing that diverse perspectives are important and necessary for responsible and representative decision making in a democracy. Diversity also enhances the organization’s ability to respond more effectively to changing conditions and needs.

Types of Membership:

- Voting members are citizens at least 18 years old.
- Household members are two or more members living at the same address.
- Associate members are persons who are under 18 years old or who are non-citizens.
- Members-at-Large [MAL] live outside the area of and are not enrolled in any local LWV, but are members of the state and national LWV.
- Life members are voting members who have belonged to the League for 50 or more years. Life members pay no dues.
TYPICAL STRUCTURE OF A LEAGUE

Although the following has been the typical structure of the League for a number of years, local leagues are encouraged to adapt a structure that is appropriate to their current needs. Assistance with this evaluation can be found in LWVUS’ “ABC’s for a Streamlined League”

Board of Directors:
- Officers elected at each level of LWV by the membership at annual meetings or conventions.
- Directors elected or appointed per the League’s Bylaws.
- Each board member is responsible for managing the activities of the League as well as for a specific area such as program, voter service, membership, finance, bulletin, public relations, publication, website maintenance, action, or advocacy.

Committees:
- Study committees study a public issue of LWV concern chosen by members at their annual meetings. They research, clarify, and develop a focus for League consideration. Their responsibility is to present facts to the members who decide whether there is a consensus [substantial agreement of members] to establish a position upon which the League can take action. Note: Positions are evaluated periodically at which time members determine whether to retain or drop them.
- Standing committees carry out the balance of the LWV’s work in voter service, membership, budget, and advocacy. Advocacy consists of lobbying, testifying, letters to the editor, press conferences, press releases, visits to editorial boards, letters and emails, forums, public meetings, coalitions, litigation and/or publications.

Meetings:
- Each local LWV determines its own schedule where programs are presented for both members and the public.
- Each board/leadership team meets at least once a month to conduct League official business. Guests and observers may attend these business meetings but may not vote.
- Each local LWV holds an annual meeting to elect officers, to set local dues, and to adopt local program, bylaws, and budget. All members can and should attend the annual meetings where they are eligible to vote.

Conventions and Councils
- A national convention is held every other year in even years. In the odd years, national meets in council attended by a smaller delegate body.
- A state convention is held every other year in odd years. In the even years, states meet in council attended by a smaller delegate body.
- Both conventions are comprised of delegates elected by local LWV’s in numbers proportionate to their membership. Any League member is eligible to serve as a convention delegate. Observers and guests may attend but may not vote. Delegates debate and vote on program, budget, financial support, and bylaws as well as elect officers for the next biennium.
STEPS TO FORM A NEW LEAGUE

General Organizational Guidelines
Throughout this process the MAL Unit will have assistance from the LWVNYS staff and one or more representatives of the state League and/or a nearby local League.

1. The idea for forming a new League arises through either citizen inquiry or State board initiative.
2. A nucleus of interested citizens is recruited.
3. A state advisor is appointed by the State Membership Chair and confers with the interested group.
4. An informational meeting is held and the decision to proceed to a community-wide meeting is made. The purpose of this first meeting is threefold:
   a. To introduce the League and discuss the MAL process.
   b. To plan an organizational meeting, if interest exists, with everyone present contributing to an extensive list of friends, neighbors, business associates and community leaders who will receive personal invitations.
   c. To develop a plan to publicize the meeting.
5. Preparations for an organizational meeting include:
   a. Consultation with state advisor re identifying all segments of community to enhance diversity.
   b. Date, time, and place chosen for widest audience possible.
   c. Agenda determined which should include:
      i. Nonpartisan policy statement for officers
      ii. Budget decided on with dues to be collected
      iii. Importance of diversity in membership
6. The organizational meeting is held and requirements for recognition as a MAL unit are presented which include:
   a. A minimum of 5 members.
   b. Nonpartisan policy for officers [sample attached]
   c. Asking each attendee to join
   d. Leadership team selection of Coordinator/Chair, Vice-chair, Secretary, Treasurer, other.
   e. Calendar of activities agreed upon.
7. The state League recognizes the MAL Unit at the next state board meeting.
8. Chosen team leaders plan the details of the calendar of activities for the year and assign tasks for fulfilling the steps for recognition as a local League.
9. The MAL leaders and members carry out a program of a minimum of four activities per year. They should be divided between program and community service with at least one that is a membership meeting. These meetings should further the League’s mission, be of interest to members and the community, and demonstrate members’ understanding of League policies and procedures.
10. The MAL leaders develop and implement a plan for membership growth and diversity.
11. The MAL meets its financial obligations to the organization as a whole and demonstrates its ability to secure needed member and community support for its operations. It may conduct fundraising activities to increase funds available.
12. The MAL publishes a regular newsletter in print or electronically that keeps members and community informed about their activities, critical issues, and organizational achievements. The MAL is urged to explore the feasibility of establishing a Facebook page and website.
13. The MAL does not need bylaws. It uses the applicable State bylaws and policy for guidance. The MAL can develop its own local policy statements with the approval of the State board.
14. MAL leader participates in bi-monthly regional director’s conference call.
15. The MAL prepares a quarterly report to be sent to the state Membership Chair and state staff. [see sample attached]

16. The MAL is encouraged to send delegates to state and national functions.

17. The MAL may apply for local League status if it has 15 members for a period of a year.

18. The annual meeting is held and, if final requirements for recognition as a local League are fulfilled, a vote is taken to apply to be a local league. [Requirements include Nonpartisan Policy, local Bylaws approved, budget and program adopted, officers and board elected.]

19. The state League approves the application at the next state board meeting and recommends to LWVUS that the Unit be recognized as a local League.

Financial Requirements

1. Upon the establishment of a MAL Unit, the state League will supply a grant of $200 for assistance with operating expenses in the first year. If the MAL is not ready to apply for status as a local League at the end of the first year, it can apply for another $200 grant to assist with operating expenses in the second year.

To qualify for a second year grant, the MAL Unit must submit a treasurer’s income and expense report from the first year activities and a proposed second year budget with an outline of proposed activities. Membership renewals for the 2nd year will be sent out by the State office staff.

MAL Units will be responsible for collecting the initial dues at the state membership rate for individual/household members and forwarding the membership applications and checks to the state League office.

2. The state League will maintain the national membership database and pay state and national PMP. The state League office will send back to the MAL Unit a per membership “rebate” for each membership received. The state League shall calculate the “rebate” by subtracting state and national PMP [per member payment] from the membership dues. *Please note: at the state level no PMP is deducted for students, but 50% is deducted for the second household member in a household membership; 50% of PMP is due for students and the second member in a household membership at the national level. The MAL Unit Financial Requirements:
   a. Must apply for an EIN# [Employer Identification Number] from the IRS.[see instructions enclosed or on the “In League” website]  
   b. Must inform the state League of the EIN#.  
   c. Must file a 990N form with the IRS at the end of each fiscal year. [see instructions enclosed]  
   d. Must create a Grant Management Account with the state’s Education Foundation to accept tax-deductible donations. [contact state League for assistance]  
      i. All state and local Leagues are classified by the IRS as 501(c)(4) nonprofit organizations. As such, donations to them are not tax-deductible.  
      ii. The League of Women Voters of New York State Education Foundation, Inc. (LWVNYSEF) was established in 1952 as a separate, tax-exempt organization with a 501(c)(3) status.  
      iii. Organizations with 501(c)(3) status are allowed to solicit contributions that are tax deductible as charitable donations. By allowing the LWVNYSEF to act as your agent or “sponsor” in the fundraising process, local Leagues can solicit tax-deductible donations for their own local use. The way this works is simple: Leagues solicit donations, donors write out checks to the LWVNYSEF, the LWVNYSEF deposits the funds, and finally, the LWVNYSEF cuts checks back to the local Leagues in support of educational projects. More information will be provided upon request.
STATE ASSISTANCE

Role of State Advisor
1. Consult with and advise MAL Unit Leadership on all aspects of League activities
2. Provide training on how LWVNYS and LWVUS positions are developed and used
3. Coordinate learning opportunities with surrounding local Leagues
4. Facilitate program calendar development and implementation for individual events [see samples]
5. Work with MAL Unit to develop budget
6. Ensure proper disbursement of financial assistance from LWVNYS for start-up costs
7. Provide periodic progress reports to the state office and state Membership Chair
8. Attend as many Unit activities as opportunity permits.
9. Ensure records are kept properly and reports are submitted on time
10. Attend first Annual Meeting if possible
11. Be on the mailing list for all materials sent from the MAL to their members.

Role of LWVNYS Office Staff
1. Add MAL Leader to local league presidents’ Listserve/mailings and provide materials from LWVUS and LWVNYS including the latest version of “In League” in New York State
2. Enroll new members in LWVNYS and LWVUS
3. Make PMP [per member payment] to both LWVUS and LWVNYS from dues collected for all MAL members and maintain National database for all MAL members.

Role of MAL Coordinator/President/Team Leader
1. Represent the MAL at local, state, and national events.
2. Make sure members are registered for mailings, publications, etc.
3. Set meeting agendas and preside over meetings.
4. Develop MAL procedures to implement the board’s decisions.
5. Develop and maintain MAL budget with advisor’s approval. This usually is delegated to Treasurer.
6. Complete the MAL Quarterly Report Form and send to the state advisor, the Membership Chair, and the LWVNYS office. This can be delegated to the secretary.
7. Confirm membership roster is accurate and forward to state office the total dues paid by each member in the MAL. This is usually delegated to the Treasurer.

SUPPORTING DOCUMENTS
1. ILO/MAL Policy (see page***********)
2. Welcome to the League brochure [handouts for all members] (see page***********)
3. Instructions for applying for EIN # (page 54)
4. Sample Nonpartisan Policy [for Organizing Team] (see page ***********)
5. Sample Membership Calendar (page 55)
6. Sample Event Planning Check List (page 58)
7. Quarterly Report Form [for Coordinator/Team Leader] (see attached)
8. Use Your Bulletin for Membership Recruitment/Retention (see page ***********)
9. Instructions for filing Form 990N with the IRS [for Treasurer] (page 59)
10. LWVUS Local League Recognition [Application to Request a Move from MAL Unit status to Local League status] (page 60)
PROCEDURE FOR A MAL UNIT TO OBTAIN AN EIN #  
*Updated July 2010*

The MAL Unit must call the IRS to obtain an EIN # (EIN = Employer Identification Number). Once the MAL Unit obtains the # EIN, they must **call/e-mail the state League** with the number and then the state League will send a letter to the IRS, asking the IRS to add the “new MAL Unit” as a subordinate under our umbrella (for tax exempt status).

The process to obtain an EIN # is immediate and can be handled either over the telephone or on the web. You can call: 1-800-829-4933 or apply online at: [https://sa1.www4.irs.gov/modiein/individual/index.jsp](https://sa1.www4.irs.gov/modiein/individual/index.jsp). At the beginning of the application process, you will be asked to check a box that best describes your legal structure. The legal structure for Leagues is found under the 7th option, “View Additional Types, Including Tax Exempt and Governmental Agencies.” Select “Community or Volunteer Group”).

For more information on what an EIN is click: [http://www.irs.gov/businesses/small/article/0,,id=98350,00.html](http://www.irs.gov/businesses/small/article/0,,id=98350,00.html)
SAMPLE
USE OF CALENDARING
PLANNING FOR & EXECUTION OF MEMBERSHIP RECRUITMENT

Membership is a year-round job! You can't just blitz it with a few intense weeks of planning for, and execution of, membership recruitment event in September.

This calendar is a plan for possible membership activities. Not everything may apply directly, and you may need to change the timing to fit the way your local League does things, but it's meant to provide a framework and a reminder of what the basics are.

May
• Meet with previous chair if you are new on the job. Ask about evaluation of last year's program, analysis of membership picture as well as "nuts and bolts" matters.
• Ask for input from your board on membership goals for the year - both recruitment and retention.
• Renew current members! Follow-up lapsed members in an effort to reactivate them.
• Start a list of prospects with help from all members.
• Set up permanent record file system or update present system.

Summer Months
• Develop membership goals. You'll need to consider:
  o List of prospects
  o Specific activities, including a major recruitment event in the fall
  o Gaining the support of other board members
  o Involving the total membership
  o Follow-up through personal contact with prospects
  o Orientation of new members.
• With the board:
  o Adopt specific membership goals. Present committee plans to board for discussion and approval.
  o Order state and national membership materials, if desired.
  o Enlist help of the PR chair to publicize membership opportunities-
    - solicit ideas.
  o Add to your list of prospects.
  o Consider holding informal neighborhood or target group recruiting sessions - most people join because they are invited by someone they know.
  o Decide who will distribute board and membership lists to members.

August/September
• Tell members about recruitment plans. Let them know what kind of help you need from them. Encourage them to bring guests to meetings all year.
• Issue invitations to recruitment events.
• Hold recruitment event. Don't forget to ask "The Question": Will you join?
• Remind non-renewed members to pay dues. Retention is essential to your program. (Give a prize for all who renew by a certain date.)
• Ask the editor to send bulletins to prospects for several months.
• Publish a membership roster for members and board.
Ask the president to set up clear lines of communication among him/herself, you, the treasurer, unit chairs and bulletin editor to assure that new members are quickly assimilated into the activities of your League according to their desired level of involvement.

Decide who will be responsible for collecting dues, making follow-up calls to members, and sending reports to state and national.

**October**
- Invite new members to an orientation meeting - make it fun and informative, not overwhelming!
- Assign mentors to new members - a personal contact throughout the year.
- Survey the interests and talents of all members; see to it that someone follows through and asks each to do what s/he volunteered to do during the year. Voter Service activities are a great place to involve new members. Make sure to follow up!
- Follow up on all non-recruited prospects with personal contact!
- Report to membership and board on progress of membership drive.

**November**
- Publish a new roster for your members.
- Remind board members of their responsibility to involve new members.
- Spotlight new members in your bulletin, each month or all at once.
- Don't give up on likely prospects - some need a lot of prodding!
- Make sure new members are getting state and national Voters and study publications.

**December**
- Hold a holiday party – try a reunion, with special invitations to former members.
- Mop-up time on renewals and prospects.
- Take a break for the holidays - you've earned one!
- Update your membership list on the LWVUS website.

**January**
- If winter is getting long, encourage the planning of a social event to help old and new members get better acquainted.
- Check with new members to see how they're feeling about League.
- Alert the budget committee to monetary needs of the membership committee for the coming year.
- Review progress on membership work to date; revise plans if necessary.
- Update the board.
- Call attention to the importance of a strong local study as a valuable membership recruitment tool.
- Make sure your membership list is current on the LWVUS website because what they see on January 31st will be used for the following years per member payment amount.

**February**
- Consider whether or not you want to plan any formal spring recruitment activities.
- Share pertinent information with the nominating committee about members' interests and talents.
- Are there any proposals for bylaw changes that will aid in recruiting and/or retaining members?

**March**
- Prepare report of year's activities and results for file and/or Annual Report.
April

- Issue special invitation (via mentor?) to new members for Annual Meeting.
- Plan recognition of new members at Annual Meeting.
- Evaluate the year's goals, tasks, successes, problems with committee and board.
- Decide how members attending Annual Meeting can help with next year's membership plans/tasks.
- Promote renewing membership at Annual Meeting. Be prepared to collect dues.
- Clean out and update your files.
- Pat yourself on the back -then your committee and Board!

Each month

- Update your membership list on the LWVUS website. Update e-mail addresses, telephone numbers, add new members, etc...
- Encourage publicity chair to send information on meetings/programs to specific non-member groups and media.
## EVENT PLANNING CHECKLIST (sample)

**Goals of every event/activity:**
- Welcome non-members
- Highlight value membership in the League
- Identify and engage new leaders

*Important Reminder—we want to be visible all year, but it may be better to do fewer events and maximize all opportunities around them, than to do a series of “less” intentional events.*

<table>
<thead>
<tr>
<th>Direct Outreach</th>
<th>Before the event</th>
<th>At the event</th>
<th>After the event</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Have members personally invited friends/colleagues to attend?</strong></td>
<td><strong>Is the sign-in sheet out?</strong></td>
<td><strong>Have you followed up with the names on the sign-in sheet?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Have membership ambassadors been identified and trained?</strong></td>
<td><strong>Is there some “take away” item (e.g., flier about next event, copies of the Voter)?</strong></td>
<td><strong>Have you thanked volunteers?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Do you have a kit of membership materials prepared (e.g., a totebag with brochures, sign-in sheets, etc that can go each event)?</strong></td>
<td><strong>Is the moderator prepared with an “ask”?</strong></td>
<td><strong>Are the membership materials restocked for next event?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Have you utilized the League’s vehicles to promote the event (e.g., website, email list, Voter)?</strong></td>
<td><strong>Are the membership ambassadors mingling?</strong></td>
<td><strong>Did you evaluate how it went – i.e., did we meet the goals above?</strong></td>
</tr>
<tr>
<td>Allied Outreach</td>
<td><strong>Can we build on someone else’s efforts (e.g., a standing event)?</strong></td>
<td><strong>Is LWV visible (if we are cosponsoring on another group’s event)?</strong></td>
<td><strong>How do we follow up with the allied organization to strengthen our relationship with them?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Who would be a good partner to cosponsor with us?</strong></td>
<td><strong>Have we made a membership pitch (from podium or through materials) that speaks to what the audience cares about?</strong></td>
<td><strong>Did we ask key members of the org to join?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Who can advertise our event through their networks?</strong></td>
<td><strong>Did we offer ways for them to be in relationship with LWV (e.g., membership, next event)?</strong></td>
<td><strong>Can we advertise our next event through them?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Who else would be interested?</strong></td>
<td><strong>Who do we know that can make this happen?</strong></td>
<td><strong>Did we evaluate how it went?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Who do we know that can make this happen?</strong></td>
<td><strong>Did you talk to any press present? (Help develop relationships by welcoming them too)</strong></td>
<td><strong>Did you send out a follow up press release or letter to the editor?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>What alternative media options are there?</strong></td>
<td><strong>Was LWV a true part of the focus of the event so that it “has to” get covered by press?</strong></td>
<td><strong>Did you send thank you note to media that attended? (Again building good relationships).</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Did we get the event listed in the “community calendar” section?</strong></td>
<td><strong>Do you have stories/quotes ready?</strong></td>
<td><strong>Did you invite media to next event?</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Are there non-print media opportunities?</strong></td>
<td><strong>Did you take photos of the event?</strong></td>
<td>****</td>
</tr>
</tbody>
</table>

| Media Outreach | **Have you identified who would be the “right” fit (e.g., the reporter who is on this beat) to cover the event?** | **Can you highlight the personal value in being a League leader – e.g., showcase opportunities, fun, etc?** | **Did you thank League leaders?** |
|                | **Have you identified the right approach to engage the reporter (e.g., desktop chat, phone call, fax)?** | **How can you acknowledge and value League volunteers/leaders publicly?** | **Did you ask the organizers what else they needed – e.g., training, resources, volunteers?** |
|                | **What alternative media options are there?** | **Is there someone who can “shadow” those in charge of the event?** | **Did you send on the list of attendees to the Nominating Committee?** |
|                | **Did we get the event listed in the “community calendar” section?** | **Did you note what League members were present (and interested in the issue/topic/event)?** | **Did you observe an area for training, mentoring or other areas of organizational growth?** |
|                | **Are there non-print media opportunities?** | **Who else can you invite to this event – i.e. what potential leader?** | **Are there notes/records in place for the next leader about this event?** |
| Leadership Development | **Who else can you engage in planning this event?** | **Can you highlight the personal value in being a League leader – e.g., showcase opportunities, fun, etc?** | **Did you follow up with anyone that you invited?** |
|                | **Is there someone who can “shadow” the organizers?** | **How can you acknowledge and value League volunteers/leaders publicly?** | ****|
|                | **Are there some small tasks to engage some potential future leaders?** | **Is there someone who can “shadow” those in charge of the event?** | ****|
|                | **Who else can you engage in planning this event?** | **Did you note what League members were present (and interested in the issue/topic/event)?** | ****|
|                | **Can you highlight the personal value in being a League leader – e.g., showcase opportunities, fun, etc?** | **Who else can you invite to this event – i.e. what potential leader?** | ****|
MAL UNIT QUARTERLY REPORT FORM
For Member-at-Large Units of the League of Women Voters of New York State

To be submitted via e-mail within 10 days following the periods ending March 31st, June 30th, September 30th, and December 31st to:
1. State League Office
2. LWVNYS VP Membership
3. Regional Director

MAL Unit: ____________________________________________
Acting President: ________________________ Acting Treasurer: ________________________
# of paid members? ___________________ Amt of money in Bank Account? ________________
CHECK QUARTERLY PERIOD: ______March 31st ______June 30th ______September 30th ______December 31st

List the meetings that were held this quarter and how many people attended each meeting:

Date: ___________________________ # of People: _________________________________________
Date: ___________________________ # of People: _________________________________________
Date: ___________________________ # of People: _________________________________________
Date: ___________________________ # of People: _________________________________________

List the activities you have engaged in this quarter:
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Is there anything special you would like to report (brag about)?
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

PERSON SUBMITTING FORM

NAME: ________________________________ TITLE: __________________________________________

TELEPHONE: __________________________________________________________________________

E-MAIL: _______________________________________________________________________________

Note: If you didn’t have a meeting or activity in a particular quarter, please let us know.

Please mail/fax/e-mail to:
LEAGUE OF WOMEN VOTERS OF NEW YORK STATE
62 GRAND STREET, ALBANY, NEW YORK 12207
TELEPHONE: 518-465-4162 / FAX: 518-465-0812 / E-MAIL: LWVNY@LWVNY.ORG
REQUEST FOR LOCAL LEAGUE RECOGNITION
PART I TO BE COMPLETED BY THE MAL UNIT

Name of MAL Unit: _________________________________________________________________

Name & Address of MAL Unit Chair: __________________________________________________
________________________________________________________________________________

Purposed Name of local League: _____________________________________________________
__________________________________________________________________________________

Name & Address of local League President: _____________________________________________
________________________________________________________________________________

President’s home and business telephone number, fax and email:

(Home): _________________________  (Business): ___________________________________
(Fax): ___________________________  (Email): _____________________________________

Date of Recognition of MAL Unit: ____________________________________________________

Has there been a full-fledged local League of Women Voters in your area in the past?  Y / N

If yes, under what name: ___________________________________________________________

Current number of paid members: ____________________________________________________

Congressional District (s) including (e.g., 4th): _______________________________________
Please attach copies of the following materials:

Attached:

      _____ Exhibit 1. Membership list
           Membership roster indicating membership type – e.g. household

      _____ Exhibit 2. List of jurisdictions your League encompasses and map
           Attach a listing of all ZIP codes in your area.

      _____ Exhibit 3. Board List

      _____ Exhibit 4. Bylaws

      _____ Exhibit 5. Budget

      _____ Exhibit 6. Nonpartisan policy

      _____ Exhibit 7. Membership activities and future plans.
           Brief outline of the membership activities including efforts
           to increase membership, improve retention and build diversity.
           Attach copies of newsletters, if any.

      _____ Exhibit 8. Program work, voters service activities and future plans
           Brief description, including community outreach components,
           And any pertinent clippings.

      _____ Exhibit 9. Fundraising activities and future plans
           Brief evaluation.

________________________________________    __________________________
MAL Unit Chair’s Signature        Date

MAL Unit: Send two copies to the state League, keep one copy for your files.
PART II – TO BE COMPLETED BY STATE LEAGUE

The state board of the LWV of ________________________________ hereby
requests the national board to grant recognition as a local League to the MAL Unit of

______________________________.

In our judgment the members of this MAL Unit have fulfilled the requirements for recognition.

_____________________________________________  _________________________
State LWV Advisor’s Signature       Date

_____________________________________________  _________________________
State LWV President’s Signature       Date

State League: Return signed original with exhibits to:
LWVUS, Member Services Division,
1730 M Street NW, Washington, DC 20036
KEEPING MEMBERSHIP STATISTICS

The national League determines the eligibility requirements for membership and the types of members. These are embodied in the third article of the LWVUS bylaws, which are also incorporated as the third article in all local League bylaws:

*Article III, Membership, Sec. 1 Eligibility. Any Person who subscribes to the purpose and policy of the League shall be eligible for membership. (LWVUS Bylaws)*

It is the responsibility of the Membership Committee to be familiar with these bylaws and with the information contained in the publication from LWVUS called the *Presidents Packet*. The national League emails all presidents a *Presidents Packet* every year, which includes information the treasurer or membership treasurer needs to know to keep accurate records of members.

The state League awards three certificates of achievement at State convention: one to the League with the greatest percentage increase in membership with under 50 members, another to the League with the greatest percentage increase in membership between 50-150 members and the Harriett Goldberg Memorial Award to the League with the greatest percentage increase in membership with over 150 members. The membership awards are based on the yearly membership count as reported to the national League by local Leagues.

Here are the most important things to remember:

1. The national League is responsible for all membership recordkeeping. The local League advises the national League on the assignment of a member to a local League.
2. Send membership additions, changes, and deletions to the national League using LWVUS’ Online Database on a regular basis, monthly or bi-monthly. Do not put this off, as you may find yourself with a mess at the end of the year and may end up paying PMP for members you do not have. It is very important to send a copy to State office so they can update their files regularly as well since national does not automatically update each State’s files.
3. As membership information is computerized, be careful to submit changes on members' names exactly as they have been recorded by the computer.
4. Additions should be sent to the national League as soon as possible. National's computer prints out the address labels used for important member information and the sooner the new member's name gets on the computer and email list, the sooner that member will receive these mailings.
5. Help members who are moving to transfer their membership. Be sure to tell the national League as soon as possible, so that addresses can be changed. If national receives transfer information before local league, it will send the information to the appropriate League.
6. The annual membership count as reported on the electronic tally form sent to each LL in January is the basis for calculating the per member payment (PMP) due to national, state, and inter-League organization (ILO), if the League is a member of the latter. These numbers are derived from the information included on the LWVUS data base for each LL and it is critical that LLs reconcile their membership numbers with those on the LWVUS data base before Jan.31 each year to ensure proper PMP billing.
7. The state League office responds to membership inquiries it receives and sends a copy of the inquiry (with name and address of prospect) to the appropriate local League.
8. The state PMP will be waived for students under the age of 25 enrolled in school. Local Leagues can set student dues at any amount, not to exceed $25. (Note: Local Leagues are responsible for national PMP.) The local League will receive a rebate from LWVUS.

9. Annually, publish a membership list with names, addresses, and phone numbers including cell phone as well as e-mail where available for all the members. Some Leagues include the membership list in a bulletin while others compile a separate membership directory. However, membership lists are for internal League use only. Any other use requires a decision by the board and prior notification of members.

MAKE SURE YOUR MEMBERSHIP ROSTER IS UP-TO-DATE!
It's crucial to keep your membership roster updated with current information. Updating your on-line roster monthly can also lessen the stress and anxiety that often accompany the official membership count that takes place in January. Included below are instructions for updating the information in your online database. For additional training on logging in to the on-line database, please contact: membership@lwv.org.

It is ESSENTIAL that you keep a true list of “active” (dues-paying) members throughout the entire year. ALL members marked “A” for active in the database will be included in your League’s membership numbers (members are NOT automatically moved to “inactive” status even if their expiration has passed) in January. It is the responsibility of each individual local or state League to make the expiration date changes.

Please note: If your League uses a common anniversary date for members, you are able to update the expiration date for all members simultaneously. There is no need to open each individual member record. Additionally, during times of increased traffic on the database, you may occasionally experience difficulty logging in. Please wait a few minutes and try to log on again. If the problem persists, contact database@lwv.org.

ACCESSING THE ONLINE ROSTER/DATABASE
League of Women Voters Online MICF and Roster can be accessed using Microsoft Internet Explorer, or other common web browser. For a complete, in depth description of this process, go to the resource titled: How to Use the LWVUS Database. Below is a brief summary to get you started.

1. Start your web browser (Internet Explorer, etc). In the address field please enter: https://www.member.lwv.org/. This will bring up the League Login page.
2. You must have your User ID and Password supplied to you by the national office (state League has the passwords, so you may call the State office to obtain yours or for instruction.) The password is CASE SENSITIVE. Please turn your caps lock off.
3. Enter the user id and password supplied by the national or state office.
4. Press Submit to login. The Message Center page will appear.
5. The system functions are in RED and UNDERLINED to the left of the page, and at the bottom of the page. These functions allow the editing of the Leagues contact information, editing and viewing of members, and editing, viewing and downloading of the League's roster.
6. You can call the state League office at any time for assistance, from obtaining your password to adding a new member.
Recruiting Suggestions
SUMMARY FROM CONSULTING FIRM ON MEMBERSHIP RECRUITMENT INITIATIVE [MRI]

How many of these beliefs do you see at work in your League?
1. Some people are just not “joiners.”
2. If people want to join the League they know where to find us.
3. We tried some outreach techniques but they didn’t get results.
4. Our newsletter’s only purpose is to communicate with members.
5. Men are uncomfortable in an organization with “women” in its name.
6. There are no urgent issues in our community.
7. We work on projects that our members are interested in.
8. People don’t like to go to meetings.
9. People don’t have enough time to take on projects.
10. In coalitions it’s important for us to keep control to see that the work is done right.
11. It’s easier to keep the same chairs than to train new people to do the work.
12. The board does most of the work of the League.
13. We don’t know what issues appeal to “minorities” in our community.
14. Local politicians and single interest people may join, but they don’t contribute to League work.
15. New members will pick up the way we do things if they participate.
16. League members tend to share the same political views.
17. We don’t need name tags at meetings because we all know one another.
18. It’s hard to get publicity for things we do.
19. We don’t have enough money for frequent mailings to members.
20. We don’t use email because not all our members have it.
21. Members aren’t interested in state and national projects.
22. Inactive members just cost us money in PMPs.
23. Dues are just too high for some potential members.

WHAT WE KNOW ABOUT MEMBERSHIP GROWTH THAT WORKS
“Member recruitment is not merely an internal matter, something that consumes energy that would be better spent on the “real” work of the League. Recruiting members is the real work of the League – not all of it, but the core of it. Every recruited member is someone whose citizenship is enhanced…”

RECRUITMENT
Identify potential League members, new groups and individuals and contact them

TAKE ON PROJECTS YOUR COMMUNITY CARES ABOUT
- “Recruiting is nothing more than the process of making people interested in what you do, and in a world in which (people) have many competing demands on their time, organizations that don’t bother to create interest in their work will find that no such interest exists.”
- “(Identify) projects that are of significant importance to the wider community, even if they haven’t traditionally been the subject of the League’s attentions.”
- “If the League…feels unable to decide what issues will appeal to particular groups, find representatives of those groups and ask them.” Kleiman Report
THE TOP 6 REASONS FOR BEING INVOLVED IN YOUR COMMUNITY
(Illinois Civic Engagement Project)

1. Chance to make the community a better place 93%
2. Be with people you enjoy 82%
3. Work with people who share your ideals 74%
4. Belief that everyone should be involved 65%
5. Wanted to learn more about the community 51%
6. Chance to influence governmental policy 50%

OFFER PEOPLE SOME PERSONAL BENEFIT FOR MEMBERSHIP

Citizen Power Skill Building Networking

“New members don’t join because “we need you”; they join because they need something the League can provide.” Kleiman Report

“Find ways to involve youth. Not only do they need to be involved, you are giving them valuable skills for the future.” Illinois Civic Engagement Project

BENEFITS OF LWV MEMBERSHIP INCLUDE BELONGING TO AN ORGANIZATION THAT:

- making a difference on vitally important issues
- provides flexibility and different ways to be involved
- encourages networking and building community contacts
- provides an opportunity to keep abreast of current political activities and weigh in on issues
- allows members to learn new leadership skills
- offers opportunities for building relationships and enjoyable interaction
- respects individual contributions, experiences, and available time
- has a record of success and a positive reputation
- is active and welcomes new members
- fulfills a desire to make the community a better place and to influence public policy

RETENTION

1. Personal Contact Inclusion
   - “[A Recruitment Campaign] means bringing in a number of new people at once – enough new people so that each new person doesn’t feel isolated and out of it and the only one who doesn’t know what’s going on.” Kleiman Report
   - “What factors are most influential in nonrenewal of membership? The sense of being unwelcome, the only stranger in a group of old friends...” Kleiman Report

2. Active Program Showing Results
   - “The sense that the League is busy but not accomplishing anything...” Kleiman Report

The data...shows that potential volunteers want to believe that their effort – no matter how big or small – is making a difference. Illinois Civic Engagement Project
VISIBILITY AND COMMUNICATION…PUBLICIZE EFFORTS…
USE NEWSLETTERS EFFECTIVELY
- “Highlight “local heroes” (small and large scale) in your newsletter.”
- “No significant difference is found across the five urban/rural regions in their levels of … political activity and discussion of current events and public affairs (but) rural residents…reported the lowest level of news exposure, while those in urban areas reported the highest level.”

DIFFERENT WAYS TO PARTICIPATE
- “Offering prospective volunteers small projects, with limited time commitments, and mentoring them to make them feel comfortable and capable may help to ease apprehension and, over time, lead to more involvement.”
- Create a personal comfort zone for volunteers: allow them to say “no” to any given volunteer opportunity; encourage them to be involved on different levels; educate them on the usefulness of their contribution and the “ripple effect.” *Illinois Civic Engagement Project*

APPLYING WHAT WE KNOW TO YOUR LEAGUE
Membership Objective: Achieve a set percentage of net membership growth
1. Develop a Plan for Growth
   a. Identify diverse populations in your community and develop an outreach plan for each
   b. Adopt a diversity policy for your League
2. Identify a membership team for new member recruitment and member retention
3. Identify a time period for a membership campaign
   a. Develop a timeline for membership activities throughout the League year
   b. Update your Board monthly on progress toward goal
4. Determine what your community responds to (voter services, local action, issue/educational forums)
5. Develop a PR/Visibility plan to highlight local League activities
   a. Develop a League web site
6. Other tactics to achieve growth:
   a. Consider meeting in a public venue, not a home
   b. Customize the LWVNYS membership brochure for your League and CARRY BROCHURES WITH YOU
   c. Write a monthly column for your local newspaper on local issues
   d. Order a LWV banner for use at every League event

WHAT IS AVAILABLE AT STATE LEVEL TO SUPPORT LOCAL EFFORTS?
- Website Link to State and National Membership sites
- “Welcome to the League” Membership Brochure with local information capacity
- Special Projects to encourage involvement
- Voter Service Materials
- State and National Communications & Listserves
- Issue Specialists on State & National Positions
- Supporting Liaisons to Local Leagues from State Membership Team
- Staff assistance with administrative tasks: data base maintenance, etc.
- On line and emailed State Board Reports
TIPS FOR A SUCCESSFUL SOARING TOGETHER
MEMBERSHIP CAMPAIGN SEASON

- Establish a membership campaign season and set a membership goal.
  - The SOARing Together program sets parameters for both of these, but your League is welcome to adapt these to fit your specific needs. The important thing is to work with your Board and/or Membership Outreach Committee to establish both.
  - Why? Research shows that a membership campaign season yields greater results for the organization. It is a time where a strong push can be made to recruit new members to reach your membership goal. It encourages League members to ask prospective members to join by creating a deadline, rather than putting it off until later.
  - Additionally, a concentrated campaign season benefits new members, who will not feel isolated if they can share their experience of getting to know League with other new members.

- Be Action-Oriented and Externally Focused – People want to see how getting involved makes a difference, and whenever possible, they want to see a tangible outcome. Leagues need to assess the needs of the community and determine how Leagues can connect with these wider community issues.

- LWVUS Diversity Toolkit has a useful worksheet to help you assess what issues have “legs” in your area. It asks you to consider the following questions:
  - What are your League’s strengths?
  - What are the pressing concerns of the local community?
  - What are the interests of potential members?
  - Who are your potential coalition partners and what are their interests?
  - Where is the likelihood for results?
  - Where is the potential for visibility?

Those issues that are common answers for at least four questions are where your League should focus its activities. These are the issues that will resonate most with the larger community and therefore your pool of potential members, and they will reinforce the relevance and vitality of League in the community. Be sure to share your work (whatever the issue) with the broader community – especially success stories!

- Create personal benefits for joining – There are so many competing interests on people’s time and resources that League must make a compelling case for how joining the organization will benefit its members. Imagine that your recruitment (and retention) strategy is like a job interview. The League is not the employer but is the potential employee. The prospective member is in the role of employer.

How can you sell the organization? What benefits can you describe? What unique opportunities do you provide? The idea of providing “benefits” might sound daunting or even expensive, but your League already provides a great number of benefits to each of its members. It is a matter of packaging them in a way that resonates with prospective members.

The first step in this process is listening to the interests of the prospective member (rather than immediately telling them what the League needs but ask them what interests them, what concerns they have)! For example, someone new to the community might be looking for ways to get to know their new town. Your League may provide a “Know Your Community” booklet, offer “expert escorts” to city council meetings, and sends out updates on community issues in your local VOTER. These would all be benefits to this prospective member.
Your League undoubtedly provides many other benefits, but in a short “sales pitch” (such as you’ll practice in the icebreaker exercise suggested below) you want to try to identify the needs of the individual member and show how League will meet them.

**TIPS FOR RECRUITING RECENT RETIREES**

- **Why recent retirees should be interested in League:**
  - Research shows that Americans ages 55-70 want to see their talents utilized. Leagues need to accommodate the needs and concerns of this population, not expect that the organization’s needs will fit those of the volunteers.
  - This group will seek activities that will challenge them, provide flexibility, and an opportunity to volunteer in partnership with family and friends. They seek volunteer opportunities, in which they can make a meaningful contribution in a short amount of time. Therefore, Leagues should provide flexible opportunities through which members can become involved in the organization.
  - Recent retirees volunteer to regain the camaraderie that they lost when leaving work. They seek shared experiences and purposefulness. According to a 1999 *Wall Street Journal* article, 23 percent of surveyed retirees identified “alienation” as their biggest disappointment of retirement. League programs and meetings – specifically working on a community activity – could help to meet this need. With its unique blend of promoting political activism and fostering citizen education through a very social network, the League is a perfect fit!
  - According to Marc Freeman, author of *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*, recent retirees represent “…the reemergence of the ‘we generation’ – the generation that first created the Peace Corps and that JFK challenged as young adults to think about what they could do for their country. These individuals are now entering their 60’s, and they appear ready to embrace their idealism once again.” Leagues should capitalize on this passion and commitment by trumpeting their successes and commitment to democracy and ideals in their communities.
  - When surveyed about why they chose to participate in certain activities over others, some of the reasons given by adults ages 55-70 included:
    - an opportunity to try new things that one might otherwise not try
    - knowing that you provided information and options to an individual unaware of choices
    - working with youth
    - stretching your own mind

**Unsure about how to ask someone to join?**

As an icebreaker at your next Board or Membership Outreach Committee meeting, practice asking people to join. A 20 minute exercise can help you to really clarify (in nonleague lingo) a short message about what the League is and does and to increase your confidence in making that ask in the future. Here are some possible role play scenarios:

- An acquaintance introduces you to a person who is new in town and notes in the introduction that you are an active League member
- A colleague at work asks you about an upcoming school board election
- You have just spoken to a community group and are asked afterwards about how you became such an excellent public speaker
- A person traveling on public transportation asks you about an article that you are reading from a League position paper.
Think about the ways League activities and retirees interests overlap.

- **How should your League market itself to recent retirees?**
  Focus group research conducted in 2002 showed that the following messages or statements were most appealing:
  - Having more control over one’s life, more freedom, and more time for personal pursuits (*NOT needing to fill time*)
  - Continued participation in life… learning, giving back, or mentoring
  - Life is a journey (and therefore new experiences are waiting)
  - Being part of something “larger”
  - As personal descriptors, “advisors”, “the experienced”, “coaches”

Initiate a campaign to recruit “experienced” members of the community to participate in a specific project or program as a way for them to fulfill their goals in retirement.

- **Identifying recent retirees**
  They are people that we already know: our neighbors, family, and friends. However, your League could take some specific measures to reach out to this community to attract prospective members: **Ask representatives of these groups** listed below if there is some activity that might bridge the League with their retiree group as well as offer to speak or present the LWV to them.

  - **Professional organizations and/or unions** local teachers’ unions, medical or legal associations, and public employees.
  - **Adult learning centers/activities** -- Many colleges and universities offer programs and classes for retirees. Is there some special training that League could provide?
  - **Religious institutions**—A 1999 Independent Sector survey found that almost three quarters of volunteers 55 years old and over found volunteer possibilities through their religious institutions.
  - **Cosponsor an event with a community organization**—Such as the Chamber of Commerce, Rotary, AARP, or corporate organization (Building on the message that “Life is a journey”, examine community issues, new ways to look at your community, and how to become more engaged in them).

- **Create visibility**
  - A 2001 survey: volunteers in metropolitan areas had been influenced by marketing tools such as *billboards, brochures, and solicitations*. Your League’s newsletter can be used as a promotional tool as well.
  - Watch *newspapers* for announcements about retirements and other opportunities
  - Promote a *gift membership* program to honor retirees or perhaps a reduced-rate introductory membership
  - Welcome *new residents* to the community--Census data shows that 26 percent of 55 to 64 year olds moved to new communities between 1995 and 2000.
  - **Most importantly, ask people to join**

**If asked**, Americans ages 55-70 are approximately four times more likely to volunteer than if not contacted. Minorities – especially African Americans and Hispanics – are almost five times more likely to volunteer when asked.
“HOT TOPICS” LUNCH

Every community has topics of interest that are unique and important to its citizens. What are the challenges that face your community today? What is the hot button issue that everyone is talking about at local government meetings? Consider using the “Hot Topics” Lunch as a venue to discuss these timely issues, while also bringing a spotlight to the League and its work.

When done with an intentional focus on organizational growth, Leagues have found these events to be an extremely successful way to attract new members to the organization. The tips below were gleaned from League experiences in Florida. We thank them for their suggestions and congratulate them on their success with this program. They report gaining 1 – 5 new members at every “Hot Topics” event!

Getting Started

- **Step One:** Enlist a small committee of two or three, including Board and off-Board leaders, to draw up a plan for three to four months. The committee should decide upon the topics to be covered as well as what speakers would be appropriate. Consider “controversial” speakers or subjects that may be outside of the “usual” League interests. Customize the program to fit your League’s needs and to utilize your League’s “connections” to secure speakers. (Panels tend to get higher attendance than single speakers, but the right individual speaker can draw a great crowd.)

- **Step Two:** Secure a venue for a luncheon that you will be able to use regularly. A private dining room is a must to ensure that your guest speakers will not be interrupted. Also consider audio/visual capability; that will be a plus as you grow! Negotiate a set price for food and beverage for your guests; remind the restaurant that you will be giving them repeat business and attracting the community’s “movers and shakers” (i.e., people who are good prospects for future business). Make sure that the cost of admission covers the cost of the meal, and some Leagues add on an additional amount to help offset the League’s operating expenses.

- **Step Three:** It is imperative that you market your lunch programs consistently and frequently. Attendance will grow, but it will depend on very consistent reminders.

Some proven marketing strategies from Leagues in Florida include:

- Put Hot Topics speakers on the cover of your League’s newsletter with their photograph and a brief biography. (See www.LWVOC.org/newsletters for samples.)

- Send out a bright colored postcard with essential information and a “catchy” title. Be sure to include the location, price, and how to RSVP. The use of post cards will make the invite stand out among other mail as well as cut down on your postage costs!

- Use your email database to send out a series of reminders before every luncheon. Be sure to include the RSVP contact, as well as all relevant information.

- Encourage members to invite their friends, family, and neighbors to these events! This is the perfect venue to bring friends who might be interested in joining the League. A personal invitation to attend – and hopefully join – will produce results.

Additional Tips and information:

- **Time:** Plan on a minimum of 90 minutes from beginning to end. Arrive early, and remember to bring your banner, membership forms, past newsletters, and a reservation list!

- **Welcome Guests:** Warmly welcome guests to this event and invite non-members to join. Have speakers and other non-members introduce themselves briefly prior to the speaking portion of the event.
• **Designate membership ambassadors:** Have two of your most outgoing and welcoming members in charge of welcoming, handing out literature, and making sure new attendees are welcomed and seated with others. Make sure your membership ambassadors are comfortable asking people to join during conversations with prospective new members!

• **Keep it fun:** Make it an interesting and informative event for members and guests to network and socialize while showing them the value of League membership.

**Sample topics:**

• Climate Change
• News vs. Opinions
• Restoring Voter Trust
• Legislative Wrap Up/Kick off
• Ethics at the Local Level: Promises and Pitfalls

In Florida, each of the events listed above attracted 85 – 108 attendees!

In identifying speakers, consider local professors, reporters/columnists, agency heads, law enforcement, legislators, lobbyists, elected or appointed school officials, hospital and college administrators, local activists or organizers, and authors. Utilize connections among League members to help secure speakers.
ATTTRACT THE COMMUNITY: CHOOSE “ISSUES WITH LEGS”

What are "issues with legs"? They are issues that transcend demographics and unite rather than divide your community. They are issues that lots of people care deeply about and have an impact on the broad community: people that are motivated to address them. “Issues with legs” can travel from one part of the community to another.

The issues that community members describe may not be the kind of issues your League has typically taken on. Residents may be concerned about school programs or the lack of city services in their area. These issues and many more, are opportunities for the League to show citizens how the system works and how they can have influence. When people see that they can make a difference on one issue, they are more likely to become involved in others. In this case, the issue's "legs" move the citizens from one issue to another. People who see the League as an avenue for making a difference on their concerns are likely to be more open learning about other League efforts.

EXAMPLES OF LEAGUES THAT CHOSE “ISSUES WITH LEGS”

After study, the League of Coos County, OR determined that the violation of the human and civil rights of people of color warranted action. The League advocated for a Human Rights Commission to "seek to ensure the basic rights and human dignity of all Coos County citizens." The League solicited human rights advocates from a variety of communities—including Hispanic, Native American, African American, Asian American, physically/mentally disabled, the aged, socioeconomically disadvantaged, and the Jewish community—to express interest in serving on the commission. The League stayed active after the commission was established, including inviting commissioners to a Diversity Workshop sponsored by the League and AAUW.

In Lawrence, KS the League addresses a mix of issues of concern to the community. Public transportation concerns people without private cars and those around town who need to commute; monitoring the issue of foster care privatization attracts the people who work in the foster care system; and, a very local issue, local park use, attracts neighborhood activists. For the local park issue, the League polled the affected neighborhood to determine residents' views on the issue. Although the League did not have a position on the park, the reputation of the League as an objective and nonpartisan organization allowed it to provide a useful service to the people who had an interest in the outcome.

HOW TO CHOOSE "ISSUES WITH LEGS"

When considering issues to take on, there are several factors to consider. Answer these questions to fill in the outer rectangles of the chart on the following page.

1. What are the League's strengths? With the profile, history and expertise of the League in mind identify key strengths that can be called on.
2. What are the pressing concerns of the local community? What are the most pressing issues that motivate local citizens, even if they are not "typical" League issues?
3. What are the interests of the potential members and diverse people you want to work with? From your contacts with respected community members, whether they are well known or not, determine what their hopes and concerns are.
4. What are potential coalition partners interested in? From your talks with representatives of diverse organizations, you should know the issues that concern them. What are they? What issues offer the greatest chance to collaborate with diverse groups?
5. Where is there the likelihood for results? On what issues can you demonstrate success? What are the potential tangible results that matter to community members concerned about these issues?
6. Where is the potential for visibility? What will get the notice of media that is targeted to diverse populations? What issues allow you to involve the most people in creating the solution so the success and attention will be?

PUTTING IT ALL TOGETHER
Review your answers for each question. Identify those issues that are common answers for at least four questions. Those issues can now be placed in the center circle of the chart on the next page, Choose "Issues with Legs": Worksheet.

To decide among issues with legs, consider if any issues are common to all six questions? What is the potential for fundraising to support the project? What is the availability of other League resources?

See worksheet on next page:
CHOOSE "ISSUES WITH LEGS": WORKSHEET

Referring to the above for guidance, complete the outlying squares. Identify those issues that occur most frequently, in several boxes. Based on these common issues, identify those issues most likely to have "legs" in your community.

1. League Strengths

2. Pressing Local Community Concerns

3. Potential Member Interests

4. Potential Coalition Partner Interests

5. Likelihood For Results

6. Potential Visibility
DEVELOPING AND IMPLEMENTING A DIVERSITY POLICY

Leagues are required to have a plan for membership growth and retention that encourages a membership as diverse as the community. However, when we think about diversity we need to think of the many (not necessarily mutually exclusive) groups that make up our communities. The following steps can be used to develop and implement a diversity policy.

1. Adopt a written Diversity Policy.
2. Identify barriers to participation in any activity of the League on the basis of economic position, gender, race, creed, age, sexual orientation, national origin, or disability.
   a. Is the diversity policy published where it will let people know that they are welcome to join?
   b. Are meetings held in accessible buildings?
   c. Are membership scholarships available and advertised?
3. Take steps to overcome the barriers identified above.
4. Identify organizations representing diverse segments of your community.
5. Look for opportunities to partner with the above groups as League activities are being planned—and be willing to take part in appropriate activities planned by these groups.
6. Ask the people you meet in these other groups to join the League.

SAMPLE DIVERSITY POLICY

The League of Women Voters of ________________, in both its values and practices, is committed to inclusion and diversity. This means that there shall be no barriers to participation in any activity of the League on the basis of economic position, gender, race, creed, age, sexual orientation, national origin, or disability.

We recognize that diverse perspectives are important and necessary for responsible and representative decision making. We believe inclusiveness enhances the organization’s ability to respond more effectively to changing conditions and needs.

We affirm our commitment to reflecting the diversity of ________________.

Formulated by League of Women Voters of the United States
June 2007
YOUR ELEVATOR SPEECH

USING THE MESSAGES
Many nonprofit organizations struggle with the task of developing a short, pithy description of their work. Many of the issues we tackle are complex, the policies nuanced; the needs of our constituents are huge. However, unless we can develop straightforward language to describe what we do, we risk alienating those we most want to reach. It’s not about “dumbing down” the explanation of our work—it’s about opening it up so that others find it relevant and interesting.

We have been stressing the importance of consistent messaging. Now this is your opportunity to try out these messages—to speak intentionally and in a focused way about League that will resonate with our target demographic.

HERE ARE SOME TIPS TO GET STARTED
- **Brevity.** It’s not just the soul of wit, it’s also the core principle of a good membership ask. You should be able to say what you need to say in about a minute. Focus on what’s most important and cut away the rest. **What does your audience value? What is important to them? Write these down and prioritize them.**
  - **The opening.** You want a hook to pique the listener’s interest, or a quick tag line to encapsulate what you are about to say.
    - For example: In year one of the Membership Recruitment Initiative, LWVUS has used the language; “LWV is where hands-on work to safeguard democracy leads to civic improvement.”
  - **Problem.** Define the task at hand in clear simple terms to illustrate the purpose of your work.
    - For example: “Today, our communities are only as strong, safe and healthy as our residents are willing to make them.”
  - **Solution.** And what are you doing about the problem. Does your organization’s mission and approach match the scale of the problem you’ve outlined?
    - For example: “At the League of Women Voters, our members are smart, active leaders who apply their skills and smarts they’ve accumulated during a successful career to create lasting change in their communities.”
  - **Action.** Close with an invitation to your listeners to be part of your solution. What can your audience do to engage, assist, or support your work?
    - For example: “Join the League where new members just like you are taking advantage of leadership opportunities and making an impact.”

A FEW OTHER THINGS TO KEEP IN MIND
- **Avoid jargon.** Nonprofits are notorious abusers of acronyms, buzzwords and insiders speak. Avoid these, or you’ll see the listener’s eyes glaze over.
- **Values.** What value does your organization provide? **What does your audience value, and how does your organization’s values intersect with theirs?** Values can be tangible (i.e., people living longer, healthier lives) or emotional (i.e., making people feel good about providing opportunity). Don’t just list your services or ideology—focus on outcomes, not process.
- **Passion.** Perhaps the most important part of a good membership **ask** is the gusto, enthusiasm and commitment to the work it expresses. Don’t be afraid to demonstrate the passion and drive you feel for the work.
PREPARING TO COMMUNICATE---A THREE STEP PROCESS

What opportunity (e.g. event with the Chamber of Commerce, city council breakfast meeting, etc.) is on your calendar?

_______________________________________________________________________________________

_______________________________________________________________________________________

STEP ONE:
What is the overall goal of this opportunity?

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________

STEP TWO:
Who is the audience at that opportunity? __________________________________________________

_______________________________________________________________________________________

Describe that audience and what they value. What do they care most about?

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________

STEP THREE:
What are you going to say? _______________________________________________________________

_______________________________________________________________________________________

Which Membership Recruitment Initiative (MRI) messages will resonate most strongly with that audience?

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________

_______________________________________________________________________________________
100 GREAT IDEAS FOR MEMBER RECRUITMENT
Produced by the LWV of Ohio – Thanks to Sue Craig and the Membership Committee 2002-2003

Recipe for success
1. Choose an idea or two from below
2. ASK the people you meet to JOIN
3. New Members!

1. Hold a “meet the Media” coffee and invite potential members.
2. Put ads in corporate newsletters.
3. Sponsor a Little League team—children have parents.
4. Buy an LWVUS Duplicate President’s mailing for your high school library; invite the librarian to join.
5. Give newly naturalized citizens a welcome packet with League membership information.
6. When conducting a study or survey, go to groups that have an interest in the topic to find both volunteers and new members.
7. Write a regular op ed piece for your local newspaper.
8. Survey your community via wheelchair or with stroller to assess accessibility; publicize your findings and reach out to persons with disabilities.
9. Send PSAs (in another language if appropriate) to minority radio stations.
10. Give celebrity membership to news anchorperson.
11. Establish an election information hotline; take names of callers for membership follow up.
12. Put your community library on the bulletin mailing list.
13. Hold workshops for other groups (on lobbying techniques, for example).
14. Conduct a wine and cheese (or ice cream social) “Singles’ Guide to Smart Voting Night.”
15. Offer a League award to a high school graduate.
16. Create press packets to promote League events.
17. Distribute PSAs to radio and television stations.
18. Establish a positive relationship with a press person.
19. Give awards to community leaders or participate in community awards program.
20. Look for reasons to have parties with outside people (e.g., dinner dance to celebrate 40th anniversary of government building).
21. Establish a speakers bureau, available to the community.
22. Create a pool of potential members by speaking to high school government classes.
23. Submit articles to your local newspaper reporting on League meetings of special interest to the community.
25. Study your community’s demographics to help identify groups of potential members.
26. Establish a committee to develop a League entry for all area and holiday parades.
27. Conduct a pizza “Know Your Government Night” in college or other community center.
28. Appoint or hire a public relations person.
29. Provide Welcome Wagon with LWV information; follow-up with newcomers.
30. Set high standards for membership materials to draw people with high standards.
31. Set up League information booths at community events (July 4th celebrations, environmental promotions)
32. Share sponsorship of a lecture series with other community groups.
33. List a number for your League in the phone book.
34. Encourage family members and coworkers to join.
35. Distribute extra bulletins to the offices of professionals.
36. Put membership coupon or list membership contact in each news story.
37. Hold contest for member(s) who bring in the most new members; contact business and professional community for prizes.
38. Have a guest book or sign-up sheet out at every meeting; follow-up.
39. List the League with the Chamber of Commerce.
40. Establish new units of the League in senior citizen communities.
41. Extend potential members a personal invitation to attend special events.
42. Always carry with you and distribute membership information.
43. Set a target group for recruitment.
44. Conduct an annual membership drive to establish a regular pattern of recruiting.
45. Give gift memberships on Father’s/Mother’s Day, holidays (“stocking stuffers”), to a friend at home with preschoolers, to celebrate a retirement.
46. Distribute membership material or bulletins to new housing developments or community swimming pools.
47. Send one or two issues of your bulletin to potential members.
48. Ask people to join; do not wait for them to ask you.
49. Obtain membership lists for other organizations and personally contact individuals.
50. Hold seasonal social events (e.g., a speaker on how to avoid holiday stress).
51. Set up a membership table at functions of other organizations.
52. Don’t be hesitant to approach newcomers, in your church group for example, and promote the League.
53. Send membership invitations to political leaders and follow up.
54. Establish corporate or workplace League Units.
55. Hold forums on community issues to attract potential members.
56. Plan a social function in a member’s home.
57. Check local newspaper for names of potential members and follow up.
58. Invite potential members to a neighborhood “Zip Code Party.”
59. Be a League booster at work and invite others to join.
60. Ask each member for a written commitment to bring in x number of new members by a certain date.
61. Telephone newly registered voters to welcome them and to invite them to join the League.
62. Buy an LWVUS Duplicate President’s Mailing for your community library; invite the librarian to join.
63. Recruit at PTA meetings, motor vehicle registration office or college registration site.
64. Give gift memberships to community leaders or to others identified as potential members.
65. Hold new member teas at a prominent member’s home.
66. Offer to present programs on League studies to other groups.
67. Hold joint meetings with other similar groups (e.g. AAUW).
68. Encourage local officials to name a League Day or Week.
69. Turn candidates’ nights into something special—invite the high school band, decorate the hall.
70. Encourage members to invite nonmember acquaintances into their homes for a social/informational coffee.
71. Place ads on your community’s cable network.
72. Place an ad in your big city’s glossy city magazine.
73. Challenge a League in another city or town to achieve a 10% membership increase.
74. Create audiocassettes for the commuter on specific topics or with general information; be sure the media receives a copy.
75. Assign board members to follow up with potential members.
76. Use specific issues to attract and involve specific segments of the population.
77. Print articles in your bulletin in your community’s second language.
78. Have a champagne breakfast—turn the average in the spectacular.
79. Create a video on a topic of community interest to share with other groups (e.g., city budgeting and its impact on women’s issues).
80. Provide alternative kinds of new member orientation for those who join throughout the year or who cannot attend an orientation meeting: one on one orientation by LWV leaders over lunch or at members’ homes.
81. Make “cold calls” on writers of letters to the editor.
82. Design membership brochure targeting young professionals.
83. Have a new member/prospective member supper with orientation.
84. Post recruitment flyer in supermarkets, community and senior centers, student unions, nursery schools, churches.
85. Get your speakers’ bureau on the “emergency list” for community groups needing a last minute speaker.
86. Stress “what’s in League membership for me,” especially with younger people.
87. Use working members to recruit working people.
88. Call the orientation meeting a “Presidents’ Coffee” honoring new members; or have a get-acquainted luncheon.
89. Don’t overload orientations with information; allow time for questions.
90. Meet with the editor of your local newspaper.
91. Get involved in a local issue—do bold and controversial things.
92. Keep the name and phone number of the membership chair on the front page of your League bulletin.
93. Combine a loose-leaf member’s handbook with a membership roster, so members can network.
94. Advertise the fact that League membership is open to all (remember that noncitizens and those under 18 may become associate members).
95. Believe and demonstrate clearly that every member, whether actively involved or not, is welcome and valued.
96. Use students from nearby college or university as office interns to do interesting, useful work for college credit.
97. To respond to the question “What does the League do?” develop a brief description of what your League does.
98. Orient new members to League lingo with short bulletin articles on consensus, nonpartisanship and the like.
99. Put membership forms in church bulletins.
100. Ask your next door neighbor to join.
Board Responsibilities
Related to Membership
USE YOUR BULLETIN
For Membership Recruitment and Retention

- Your Bulletin is a membership outreach tool, letting the community know what the League is doing and creating a positive image of the League. We think that even the smallest League should print extra copies to be placed in public locations, like libraries and town halls (no postage required for this). Larger Leagues can probably afford to mail to targeted community members and public officials.
- Your Bulletin is a membership retention tool, providing all the information your members need to participate in League process and activities. It carries information about all levels of League. It connects them to each other and the League. It lets even the most passive of members know that the League is doing vital work.
- Your Bulletin is a networking tool, connecting you to Leagues across the State through posting your bulletin on the state League website. News about your League and its members gets into the NYS E-mail Newsletter via the information the Membership Outreach Director gleans from the Bulletins you send to her. And your members will enjoy seeing their names in print in a statewide publication.

What features make for good bulletins?
In the CONTENT area, we think that each issue of your bulletin should have:
- A calendar of upcoming events either in list form or like a calendar page.
- Announcements of events that will take place before the next bulletin (with time, date, place, topic)
- President’s message
- League Action (either specific action alerts, or general how to take action and its importance).
- Membership form or how to join information.
- Board or Officers list and contact information (phone &/or email).
- Bulletin Editor’s name and contact information.
- Predictable schedule of issues.

One issue must print the notice of the Annual Meeting, proposed budget and nominating committee report, as required by the bylaws.

Most issues should include:
- Program background information
- Voters’ Service Activities
- Information about Public Meetings

Desirable items are:
- Profiles of members
- Success stories
- Observer reports
- Table of Contents

STYLE items everyone looks for:
- The required League logo as a part of the masthead (This is the one with the slash and the little “r” with the circle around the “r” – to show it is our registered trademark).
- Masthead that clearly identifies your League.
- Easy to locate issue date e.g. January, summer, March/April.
- Pleasing layout, with predictable placement of regular features such as board list.
- Ads (if you have them) placed so that they do not detract from League information. (This team of judges doesn’t like them inside the front page or mixed in with League articles on a page).
- Writing that is lively, clear and grammatical.
- Type (font) that is easy to read.
- Clean copy (not smeared, pages centered on paper).
- Photos and/or graphics (if used, and they are desirable) should be appropriate and of decent quality.

Pay attention to your mailing list:
Take some time to define your audience. Usually it will consist of members, prospective members, public officials, organizations with whom you frequently collaborate. But sometimes a particular issue will deal with a topic e.g. children’s issues, and you will want to mail that particular issue to all the organizations working in that subject area.
- Have a systematic way to add and drop names. (How long is a prospective member on the list before being dropped?)
- Does it reach everyone your budget can afford to reach?
- Does it include the State League President?
- Does it include the electronic copies to LWVUS and LWVNYS?

You should strive for a TOTAL EFFECT that is upbeat, inspiring, and readable. Your bulletin should create a good impression of your League.
MEMBERSHIP & VISIBILITY OPPORTUNITIES
During Election Season

This information is being shared with all Leagues to strengthen membership recruitment efforts throughout the organization. The ideas and messages contained in this short memo are meant to be combined with and complement the voter service efforts that your League is doing this election season. It is a reminder to all League leaders that, during a time of increased visibility like an election, it is critical to be able to articulate (in a concise way) why membership in League is important and to ASK people to join.

Membership recruitment is something that can and should be done around your League’s voter service efforts.

LWV is well known for its work on election related issues. In developing the LWV Membership Recruitment Initiative, research found that LWV media coverage peaked around the 2004 elections. A significant amount of that coverage surrounded the fantastic local League election related activities, such as voter guides and candidate forums. The upcoming elections will offer a similar period of heightened visibility. To help maximize this, Leagues should incorporate membership recruitment messages into election activities that are planned – package the membership messages outlined below with your existing work/activities.

Assessing the Opportunities
In order to best leverage existing outreach opportunities, Leagues should conduct an assessment of the opportunities that are already planned where League members will communicate with potential new members.

- **Existing LWV Opportunities** – Leagues should review their entire calendar and identify scheduled events (i.e., candidate forums), communications (i.e., Web site, voters guides, flyers, etc.), and other relevant activities that will reach an external audience.
- **Opportunities Presented by Other Groups** – Similarly, Leagues should consult community calendars (often on the local media's Web site) and the events and activities that are being sponsored by other organizations including area universities, local media outlets and potential allied organizations, and generate a list of the opportunities that may exist for Leagues to disseminate relevant voter materials and membership message.

Messaging
Once Leagues have identified the opportunities, Leagues are encouraged to promote the benefits of membership and ways to join in their election activities. While different contexts may necessitate some adjustments, the membership message below is designed to tap into a core value of wanting your community to be strong, safe, fair and healthy. It is believed that this will resonate with many in your community, especially women ages 50-65, who are entering retirement and have been politically active.

“The League of Women Voters is where hands-on work to safeguard democracy leads to civic improvement. Join LWV and be directly involved in shaping the important issues to keep our community strong, safe and vibrant.”

Membership messaging like the above should be consistent and constant. Include a membership message in as many of your media statements and election materials and activities as possible. We anticipate that messaging around strong communities and opportunities for leadership are likely to resonate powerfully during an election cycle.
**The Key Step**
The tips below in the Opportunities for Media Outreach section will help get your League noticed in the media, but there is an additional key step that you *must* take to gain new members: **You must ASK people to join.** Give them easy opportunities to join. Make sure the home page of your League’s Web site has a highly visible and easy option for people to join. Make sure you have forms and sign up sheets at your forums. Encourage people who attend candidates’ forums and debates to join. Put a “Join the League” ad in your voters guide (paid for by your operating fund), and when talking to someone who becomes excited about what your League is doing, ASK them to join right then and there! Carry membership brochures and sign them up!

**Membership Messages at League-sponsored Election Events**
While there are plenty of opportunities at League-sponsored events to weave in “the message,” it is not always easy to make these two very distinct subjects (such as election related issues and League membership) fit together in a cohesive way. Below are some possible suggestions about how to do so this election season. The exact words are not critical but communicating the underlying values is!

- **Candidates’ Forum.** From the dais, the moderator could include the following message in his/her opening remarks – “The League of Women Voters is a trusted, nonpartisan political organization. Our members do the hands-on work to safeguard democracy. While we never endorse a candidate, we are directly involved in shaping the important issues to keep our community strong. As an LWV member, I have the opportunity to contribute in a leadership role (such as this one) that has a great impact on local, state and even national issues. If you are interested in learning about how you can make a similar impact, I would encourage you to pick up some of the League’s information available here tonight or visit our web site at XXX.”

- **Issue Forum.** From the dais, the moderator could include the following message in his/her opening remarks - “The League of Women Voters is a trusted, nonpartisan political organization. Our members do the hands-on work that safeguard democracy and lead to civic improvement. As an LWV member, I have the opportunity to contribute in a leadership role (such as this one) that has a great impact on local, state and even national issues. If you are interested in learning about how you can make a similar impact, I would encourage you to pick up some of the League’s information available here tonight or visit our web site at XXX.”

- **Voters’ Guide.** You may place an ad for membership – “The League of Women Voters is where hands-on work to safeguard democracy leads to civic improvement. Join the League and be directly involved in shaping the important issues to keep our community strong, safe and vibrant. As an LWV member, you are a part of an organization where thoughtful, active leaders work to create change in their communities. To join us please visit: YOUR LEAGUE’S CONTACT INFO/PREF WEBSITE HERE.

Remember to make it easy for an individual to join. Have League materials (such as membership brochures and copies of the *Voter*) available. Offer to do follow up, use the membership messages provided, and engage people with your own personal League success story. Most importantly, make sure you remember to ASK people to join the League. All Leagues have the opportunity to increase membership. After all, the League is where hands-on work to safeguard democracy leads to civic improvement.

**Opportunities for Media Outreach**
The following are suggested key outreach activities that Leagues are encouraged to explore to increase **visibility**, drive traffic to your League’s Web site and, as appropriate, deliver direct membership recruitment messages through the media during an election season. When possible, we would like you to use the election as the media “hook” and overlay the membership messages. Please note that these are broad recommendations and
are in no way intended to replace or interfere with existing plans that your League may have for communications and activities during the election season. At a minimum, please try to wrap up all media contacts with a “plug” for the League that emphasizes membership.

- **Membership language.** Leagues should use the membership language on all media communications (media advisories, press releases, press statements, etc).

- **Tip Sheets.** A tip sheet with ideas for creating local stories could be released in your local and regional media markets at a key point during the election season. These tip sheets would be disseminated to your local media via email and include a brief story idea and relevant League contact information where the reporter could follow-up. In other words, you can provide story ideas to the reporters in your area. They will be looking for ideas beyond the “horse race” story, and your League can provide those ideas. (Please refer to *Voter Turnout: Let’s Turn It Up!*, a publication of the National Association of Broadcasters and LWV, on www.lwv.org for suggestions. Although prepared for the 2004 election, much of the information and the PSA scripts are not outdated.)

- **FAQ’s** - Develop a list of the top 5 questions for journalists to pose to local officials/election commissioners regarding steps that are being/have been taken to ensure voters are enfranchised in all elections.

- **Talk Radio/Public Television.** Propose ideas to talk radio shows and public television programs about hosting key League members to discuss the status of the area’s election system and any concerns about voter access or participation. Leagues may consider recruiting/recommending additional participants from allied organizations. In preparation for participation in any radio and/or TV appearance, key talking points should include a message to visit the Web site for more information. Leagues may also want to inquire about how to air PSAs. Scripts are available on the LWVUS Web site.

- **Opinion Pieces.** Draft an opinion piece that highlights key issues/concerns around the voting process or voter access to participation. Special consideration should be given to the signer of the op-ed and Leagues may consider whether co-signing the piece with an allied organization may elevate League visibility.

- **Rapid response.** Leagues should scan media coverage on an ongoing basis beginning now through the election to identify opportunities for the League to insert messages on voter access and participation through letters to the editor.
HOW TO MAKE CHANGES TO THE LWVUS ROSTER

To enter changes to the roster, you must be at your League’s online Home Page. Please contact either LWVUS via Betty Taira at: BTaira@lwv.org or LWVNYS via Stephanie Lopez at: Stephanie@lwvny.org/518-465-4162 for assistance.

Changes to Individual Member Records Include:
1. change in member status such as: active, inactive and to enter deceased information;
2. change of contact information; update e-mail address
3. correct expire dates, enter birthdates, and enter join dates;
4. process household member records;
5. add new members.

Entering Changes:
1. Click on Roster listed on the left side of the screen.
2. Click on Active, Inactive or Both by Account Status and by File, click on View. We suggest opening Both to activate, inactivate or before submitting an ADD MEMBER form. This will save you the effort of completing an ADD MEMBER form because in many instances, the member you wish to add may be on your inactive roster. If this is the case, all you have to do is to activate the member and enter the current expiration date.
3. Click on the Member ID of the record in which you wish to enter a change or changes.
4. Hit your TAB KEY after each change entered. When you have entered all your changes, scroll down to the bottom of the page and click on SUBMIT CHANGES.
5. Use your back arrow to return to the roster to make your next change.
6. Continue this process until you have entered your changes. Notice that the changes you enter are in red font. The red font will appear on records which have changes entered by the local or state League, LWVUS, our database server or the individual member.

Adding a New Member
The name of the new member WILL NOT APPEAR on your roster immediately as your other roster changes. Enter an Add Member form only one time. After 3-work days have passed and the new member’s name does not appear on your roster, contact Betty Taira at BTaira@lwv.org or Lela Sallis at LSallis@lwv.org.
1. Click on Add Member listed on the left side of the screen.
2. The “Search Screen” will come up—this is to AVOID DUPLICATE RECORDS—Search the Name and either update the record that comes up or enter a new record if nothing comes up
3. **Don’t forget dates are always entered in this format: dd/mm/yyyy i.e. 3/23/2011
4. Scroll to the bottom of the page and click on Submit. Remember that this new record will not appear on your roster immediately.

Download Roster
This Excel spreadsheet is not interactive with the online database roster. However, it has features you would use to make labels and to ascertain the correct number of household members (sort data by Address 1). The data on this spreadsheet may be placed on your hard drive but you must remember that the information changes frequently and that it is not interactive with the online database roster.
**ILO/MAL POLICY**

Acknowledging the added benefit of membership in the League of Women Voters of New York State (LWVNYS) when opportunities exist to participate in local and/or regional League activities, the LWVNYS encourages the New York State Inter League Organizations (ILOs) to establish a direct relationship with Members-at-Large (MALs) in their area in the form of enhanced services. Such services would include periodic mailings throughout the year as well as offering county/area League programs and events in which the MALs are encouraged to participate.

Should the ILO agree to provide enhanced services to individual MAL members, the ILO would be given a per-person “MAL rebate” of $5 each from the state League to help cover the cost of those services.

All individual MALs would still be members of LWVNYS, and LWVNYS would administer the dues renewal process, maintain membership information on the state database and do all reporting of membership information changes to LWVUS. LWVNYS would be the required source for mailing lists or other contact information needed by the ILO.

(LWVNYS Board of Directors January 2004)
Suggested Letter Formats
SAMPLE
INVITATION TO JOIN LETTER

LEAGUE LOGO

LOCAL LEAGUE ADDRESS, PHONE, WEBSITE ADDRESS

Name
Address
City

Dear [salutation]:

We think that you and the League of Women Voters have a lot in common— wanting your communities to be strong, save, and healthy; wanting to have an impact outside the family circle; wanting to have opportunities to serve as a leader.

That is why I would like to invite you to join the League, a non-partisan organization with over 90 years experience in Making Democracy Work.

Our mission is to help every citizen have a voice in government, which we believe is the foundation and strength of our democracy. To that end, this past year the League of Women Voters __________ has been active in programs and activities such as [INSERT PAST LOCAL LEAGUE ACTIVITIES].

For the upcoming year, we will continue our efforts in such areas as [INSERT FUTURE PLANS FOR LOCAL LEAGUE].

In addition to being directly involved in influencing public policy at all levels of government, the League offers opportunities to develop and use leadership skills as well as the chance to work with like-minded individuals concerned about civic improvement.

Enclosed is a brochure and our VOTER which will show you the times and places of our meetings. We invite you to attend and find out more about the most dynamic citizen organization in the country. If you have any questions, please call our Membership Chair at [insert phone number].

Make a difference. Join the League of Women Voters.

Sincerely,

President

The League of Women Voters is where hands-on work to safeguard democracy leads to civic improvement
SAMPLE
“WELCOME” NEW MEMBER LETTER

LEAGUE LOGO
League address, phone and website
Date

NAME
ADDRESS
CITY

DEAR

On behalf of the League of Women Voters of _________, I am delighted to welcome you as a member.
You have joined an organization that has provided leadership on a myriad of national, state and local issues and
has given its members a network of friendship and involvement for over 90 years. When you joined our local
League, you automatically became a member of the League of Women Voters at all levels so you will receive
the State and National communications, in addition to our local monthly bulletin.

Our local League has been very active this year. We [ INSERT past LEAGUE Programs and activities]
During the upcoming year, we plan to [INSERT future LEAGUE SPECIFIC PLANS ]

The League of Women Voters is where hands-on work to safeguard democracy leads to civic improvement and
where you can be directly involved in shaping the important issues to keep our community strong, safe and
vibrant. Your support will help us accomplish so much in our mission in Making Democracy Work.

Thank you for your commitment to the League of Women Voters.

Respectfully,

President Membership Chairman
SAMPLE
DUES RENEWAL LETTER

Dear ________,

It's time to renew your membership in the League of Women Voters of ____________________.

You are part of a grassroots network of women and men in communities across the country. Without your participation and dues support, the League could not fulfill its commitment to helping every citizen have a voice in government. The League of Women Voters is where hands-on work to safeguard democracy leads to civic improvement. Join LWV and be directly involved in shaping the important issues to keep our community strong, safe and vibrant.

Your membership means that the League of Women Voters of ____________________ can continue to be an active and vital part of the community. This year we . . .

Your participation and dues support make these and other valuable services possible.

Every member strengthens the League's political clout. Even when you don't have the time to be personally involved, your membership dues support the actions of other League members who work for better government. As a member, you make everything we do possible.

Please renew your membership in the League by returning the enclosed renewal form before the end of the month so you can continue to receive mailings without interruption. Dues for membership are not deductible for income tax purposes.

Thank you for your membership in the League. Your involvement is important and very much appreciated.

Sincerely,

Membership & President
Suggested Member Survey Formats
SAMPLE
TELEPHONE SURVEY FORM

Hello, this is __________________ calling from the League of Women Voters. We are conducting a survey of our members so that we can more effectively plan programs and activities to meet your interests and needs. Would you be willing to spend about 10 minutes telling me a few things about yourself?

PERSONAL DATA

Name: __________________________________________

Currently, do you wish to be_____ active on a committee or _____participate occasionally?

What meeting times are best for you?

Weekdays
(1) _____ morning   (2) _____ luncheon   (3) _____ afternoon   (4) _____ evenings

Weekends
(1) _____ Saturday Morning   (2) _____ Sunday Afternoon

Do you need a babysitter to attend meetings?   _____ Yes       _____ No

Are you a member of any other community organization(s) and do you hold a board position with them?

Organization __________________________________________
Board Position __________________________________________

MEMBER INTERESTS

We would like to know which ways you would be willing to participate in the League this year:

_____ Attend Meetings…Monthly League Programs
_____ Committee Member: (Circle ones of interest)
Natural Resources     Judicial
Government/Election Law     International Issues
Land Use     Health Care
Social Policy     Women’s Issues

_____ Participate in a survey/study of our school

_____ Telephone call to members for meeting/special event reminders

_____ Write letters to elected officials

_____ Be on the Action Alert Email list (take less than 5 minutes to send action emails to elected representatives on subjects the League is advocating)

_____ Voters service (registration and election related activities)

_____ Radio/TV work

_____ Monitoring public meetings i.e. legislative or judicial

_____ Soliciting bulletin ads
____ Refreshments for meetings
____ Donate home for meetings
____ Could we call you if we need help with a specific activity? (For example, for voter registration drives, new member orientation, annual meeting, fundraiser, lobbying and elected official, publicity for a special event.)
____ Mentor for a new member

**ABOUT THE LEAGUE**

*What particular activities would you like to see the League sponsor?*

_________________________________________________________________________________

*Which League activity do you particularly enjoy?*

_________________________________________________________________________________

*I read the League bulletin: _____ thoroughly _____ sometimes _____ seldom*

*I would like to suggest the following in regard to the bulletin:*

_________________________________________________________________________________

*Can you think of any friends or acquaintances that would like to join the League?*

*Names*  
*Addresses*  
*Telephone*

_________________________________________________________________________________

(or call ____________________________, Membership Chairperson)

*Can we share this information with: _____ the Board _____ League Membership*

Thank you very much for your time!
SAMPLE MEMBERSHIP INFORMATION FORM

Please take a few minutes to fill out this form.

Your participation will help to keep our League vital – and you’ll find that League is more interesting when you’re involved. As you see, time commitments can be brief, moderate, or lasting, so we hope you’ll let us know what you would like to do.

Name: ____________________________________________

Street Address: ____________________________________

City, State, Zip: ____________________________________

Telephone: ________________ (home) ________________ (work)

Cell Phone: ________________ E-Mail ________________

Please check the following ways you would be willing to participate in the League this year:

- Attend monthly meetings (League program presented)
- Make telephone calls for meetings and other activities
- Committee member (Circle ones of interest)
  - Natural Resources
  - Government/Election Law
  - Social Policy
  - Land Use
  - Judicial
  - International Issues
  - Women’s Issues
  - Health Care
- Board member ________________ (position)
- A participant in a study this year or next ________________ (topic/area)
- Letter writing to our representatives and elected officials
- Voters service
- Refreshments for meetings
- Donate home for meetings
- Could we call you if we need help with specific activity? (For example, for voter registration drive, new member orientation, holiday party, annual meeting, fundraiser, ___________________________ [other])
- Mentor for new members
- Recruit new members
- Finance drive

What special skills or experience can you bring to League?

________________________________________________________________________

________________________________________________________________________

Do you know someone who would like to join our League? (friends, acquaintances, relatives) Name

Name

Address

Telephone

Email

________________________________________________________________________

________________________________________________________________________

Please return this completed form to Membership Chair

NAME/ADDRESS
Membership Brochures and PowerPoint Presentations Available
WELCOME TO THE LEAGUE
Available as a stand-alone publication, in brochure format
from the state League Office
Updated August 2009

WHAT IS THE LWV?
The League of Women Voters is a nonpartisan, grassroots political organization open to men and women. It encourages informed and active participation in government, works to increase understanding of major public policy issues, and influences public policy through education and advocacy.

The LWV neither supports nor opposes any political party or candidate for elective office, but does encourage its members as individuals to take part fully in the political process.

The League operates at the local, state, and national levels in every state, Washington, D.C., Puerto Rico, and the Virgin Islands. In New York State, there are over 50 local Leagues.

WHAT IS THE HISTORY OF THE LWV?
The LWV grew out of the suffrage movement. In 1920, after the passage of the 19th amendment, Carrie Chapman Catt, who led the battle and later lived in New Rochelle, organized the League of Women Voters of the United States. The LWV’s first goal was to equip women to exercise their new right to vote. Since the 1970’s, membership in the LWV has been open to women and men and now men make up a significant part of our membership. Political action based on knowledge gained from study became the cornerstone of the LWV’s diverse agenda.

A SAMPLING OF WHAT THE LEAGUE DOES:
Voter Service and Citizen Education
The League works to encourage citizens to register to vote and to take part in government and politics through organization of:
- Candidate forums/debats
- Voter registration drives
- Voters guides with information on election requirements and specific ballot proposals for upcoming election
- On-line voter & absentee ballot information
- New citizen information & political directories

The League also coordinates studies and educational forums for member and public education. Recent forums or studies include:
- Saving local tax dollars through governmental shared services and consolidation
- Maintaining integrity of the vote in this era of post-lever voting systems
- Running for office in New York City

Advocacy and Lobbying
The League will lobby legislators on specific legislation supporting our issues such as:
- Transparency in government
- Campaign finance reform
• Ethics reform
• Rules reform
• Redistricting
• Court system and judiciary
• Water quality, land resource management
• Health care reform
• Domestic violence
• Equal pay
• State financing of education
• Transportation

The League’s advocacy work includes:
• Developing public policy briefs with detailed information and recommendations for addressing the issue through specific reforms
• Providing forums for discussing issues and educating policymakers and the public

HOW IS THE LWV ORGANIZED AND HOW CAN A MEMBER PARTICIPATE?
The LWV operates at the local, state, and national levels. Joining at one level automatically makes you a member of the other two levels. Members usually participate at the local level when they first join.

Membership: open to any person who subscribes to the purpose and principles of the LWV. The LWV of New York State is committed to diversity, recognizing that diverse perspectives are important and necessary for responsible and representative decision making in a democracy. Diversity also enhances the organization’s ability to respond more effectively to changing conditions and needs.

• Voting members are citizens at least 18 years old.
• Household members are two or more members living at the same address.
• Associate members are persons who are under 18 years old or who are non-citizens.
• Members-at-Large (MAL) live outside the area of and are not enrolled in any local LWV, but are members of the state and national LWV.
• Life members are voting members who have belonged to the League for 50 years. Life members pay no dues.

Board of Directors:
• Officers elected at each level of LWV by the membership at annual meetings or conventions
• Directors elected or appointed per the League’s bylaws.
• Each board member is responsible for managing the activities of the League as well as for a specific area such as program, voter service, membership, finance, bulletin, public relations, publications, action or advocacy.

Committees:
• Study committees study a public issue of LWV concern chosen by members at their annual meetings. They research, clarify, and develop a focus for League consideration. Their responsibility is to present facts to the members who decide whether there is a consensus (substantial agreement of members) to establish a position upon which the League can take action.
• Standing committees carry out the balance of the LWV’s work in voter service, membership, budget and advocacy. Advocacy consists of lobbying, testifying, letters to the editor, press conferences, press releases, visits to editorial boards, letters and emails, forums, public meetings, coalitions, litigation and/or publications.
Positions are evaluated periodically where members determine whether to retain or drop them.

Meetings:
- Each local LWV determines its own schedule, but most meet at least once a month.
- Each local LWV holds an annual meeting to elect officers, to set local dues, and to adopt local program, bylaws, and budget. All members can and should attend the annual meetings.

Conventions and Councils:
- A national convention: every other year in even years.
- A state convention is held in odd-numbered years.
- Both are comprised of delegates elected by local LWVs in numbers proportionate to their membership.
- Any League member is eligible to serve as a convention delegate. Observers and guests may attend but may not vote. Delegates debate and vote on program, budget, financial support and bylaws, and elect officers for the next biennium.

HOW MUCH TIME MUST I DEVOTE TO THE LWV?
The level of involvement is up to you.

Some Members support League activities with their dues alone. Some members attend social events and educational forums.

Busy professionals often volunteer for time-limited projects that can be completed on their time schedules. Examples of such involvement include, writing Amicus briefs, analyzing budgets, analyzing bills or preparing testimony in areas of expertise, speaking on subjects in which they have professional expertise, acting as moderators of candidate forums, writing letters to elected officials or letters to the editor in areas of expertise.

Some members with more time to devote to the LWV organize major projects or elect to assume board positions.

The LWV is unusual, in that it offers opportunities for involvement at the local, state, and national levels of government, depending upon your level of interest.

HOW DOES THE LEAGUE FINANCE ITS ACTIVITIES?
The LWV is a non-profit organization that relies primarily on dues and contributions to operate and to achieve its goals. Support comes from members, nonmembers and the community at large.

Each local LWV decides the amount of its dues. From its funds, the local LWV pays a Per-Member-Payment (PMP) to support national, state, and regional Leagues. The LWV also conducts fundraising campaigns at each level.

Since the LWV is a lobbying organization, donations for advocacy activities and League membership dues are not tax-deductible.

The Education Foundations at the state and national level qualify as tax-deductible organizations since their funds are used exclusively for educational projects.
WHAT ARE THE LWV’S PRINCIPLES?

The LWV believes:

- In representative government and in the individual liberties established in the Constitution of the United States;
- That democratic government depends upon the informed and active participation of its citizens and requires that governmental bodies protect the citizen’s right to know by giving adequate notice of proposed actions, holding open meetings and making public records accessible;
- That every citizen should be protected in the right to vote; that every person should have access to free public education which provides equal opportunity for all; and that no person or group should suffer legal, economic or administrative discrimination;
- That efficient and economical government requires competent personnel, the clear assignment of responsibility, adequate financing and coordination among the different agencies and levels of government;
- That responsible government should be responsive to the will of the people; that government should maintain an equitable and flexible system of taxation, promote the conservation and development of natural resources in the public interest, share in the solution of economic and social problems which affect the general welfare, promote a sound economy, and adopt domestic policies that facilitate the solution of international problems;
- That cooperation with other nations is essential in the search for solutions to world problems, and that the development of an international organization and international law is imperative in the promotion of world peace.

THE BROCHURES LISTED BELOW CAN BE FOUND ON THE STATE LEAGUE WEBSITE OR ORDERED FROM THE STATE LEAGUE OFFICE

- SARATOGA LWV MEMBERSHIP BROCHURE
  Sample that can be easily tailored to fit your League
- The Gloves are Off...

POWERPOINT PRESENTATIONS CAN BE FOUND ON THE STATE LEAGUE’S WEBSITE

- DELEGATION
  How to Share the Work
- LEAGUE LEADER SYNDROME
  How to Pass the Baton
- MEMBERSHIP ORIENTATION PRESENTATION
  Welcome New Members
RAISING AND MANAGING MONEY
TIPS FOR TREASURERS

JOB DESCRIPTION: TREASURER

OBJECTIVES: To keep accurate financial records for the League. To assist the board with financial information.

RESPONSIBILITIES:
1. Assist the board in determining the best use of League money in line with the purpose of the League and the goals determined by the board and the membership.
2. Collect and disburse all League funds as directed by the board, allocating funds to budget categories.
3. With the membership director, maintain an up-to-date membership list and send out dues notices.
4. Collect sales tax on all publications sold or purchased for use by the League. Remit as required by the State of New York.
5. Oversee all League financial records. Assist board members with financial information as needed. Provide complete records for audits.
6. Make periodic reports to the board and membership on the League's financial status. Prepare a report for the annual meeting. Prepare required reports for the state and national Leagues, the State of New York, and the federal government.
7. Serve as a member of the budget committee. Assist the committee in realistically assessing the League's financial position relative to its goals and priorities.

The job of treasurer is one of the most important in the League. The financial records must be accurately maintained, and the board and budget committee need the on-going assistance of the treasurer in order to assess realistically the League's financial position.

HOW TO BEGIN
Read Management Tips: Treasurer available under the For Members section of www.lwv.org
Also review the following material carefully to get an understanding of the deadlines that must be met during the year and of what information is needed to prepare reports.

Work with the previous treasurer to set up the books for the fiscal year (which may need to be done before the annual meeting at which you are actually elected). Having the budget categories for the year will greatly simplify compilation of the various reports for which the treasurer is responsible.

Be sure to register the treasurer's signature at the banks which carry the League's accounts under the local League’s Employer Identification Number. The banks also should have the president's signature so that, in the event the treasurer is absent or incapacitated, there will be another signature available to carry on League fiscal affairs. If necessary, change the mailing address.

FINANCIAL RECORDS
Keep careful records of all income and expenses. Prepare and present a monthly treasurer's report at each board meeting. Include the balance of the beginning of the months, receipts and expenditures during the month, and the balance at the end of the month. (This should agree with total amounts in checking and savings.
accounts.) Be sure to comment on any large or unexpected receipts or expenditures. It is also useful to provide
the previous year's balance on hand for the same period. The proper use of the League's money is the
responsibility of the entire board. Encourage board discussion of the treasurer's report. Every three months a
budget comparison statement, relating income and expenditures to the adopted budget, should be presented so
that the board can review the League's financial position and reevaluate priorities for the year. Remind the
board that they are as responsible for raising money as they are for spending it. Board members are responsible
as well for keeping within their own budgets for expenditures.

REMEMBER: THE TREASURER MUST KEEP ALL FINANCIAL RECORDS FOR AT LEAST FIVE
YEARS.

Pay the bills. Have all bills approved for payment. The board member who authorized the expenditure should
indicate the budget line to be charged. Sometimes proper budget categories are difficult to assign and will
require consultation with the president or a board member who served on the budget committee. When drawing
the check, mark bill PAID (preferably with a rubber stamp) and indicate the check number and date of payment.
All orders for state and national League publications except Facts for Voters must be prepaid. Work out
arrangements with publications director, and be sure you are informed about the budget category or categories
to be charged.

Prepare vouchers and give copies to all members who will need them. Following is a sample form that you
can adopt.

---

**SAMPLE**

**EXPENSE VOUCHER - BOARD AND COMMITTEE MEMBERS**

League of Women Voters of .............................................  Date ................................

Name ...............................................................  Position in the League ..........................................

**EXPENDITURES:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Purpose of Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sub-total: .............................................

If you wish to contribute all or part of this, please submit amount: .............................................

Paid by check # .............................................  Total: .............................................

Date .............................................

(SIGNATURE)

Approved: .............................................

Submit to treasurer at board meeting. Attach bills or receipts.
---
Deposit income checks promptly. Confer with the finance director so that an appropriate system for recording finance drive income can be developed. Be sure that bills for League services, publications and dues are mailed promptly; follow up on any bills that remain unpaid.

MEMBERSHIP DUES
In some local Leagues the treasurer is responsible for collecting dues. It is important to maintain UP-TO-DATE membership list at all times. With the membership director and the person responsible for distributing the bulletin, establish a system to ensure accurate records. This will assist the membership director in reporting an accurate count to LWVUS each year. Your League's membership figure as of January 31st is the basis for calculating the per member payment (PMP) due to both the state and national Leagues.

Send membership dues bills one month prior to their due date. Many Leagues have found an addressed return envelope helpful. If a dues change is to be voted at the annual meeting, send out dues notices immediately after the meeting. Members not responding to the first dues notice should be sent additional notices, should be contacted personally and should be dropped from the rolls if no response is received after a reasonable period of time. The goal in collecting dues is to keep membership at the highest level possible and not pay PMP for those whose membership has lapsed.

IRS rules require that dues notices indicate that dues and contributions to the League of Women Voters are not tax deductible as charitable contributions.

League boards can adopt a policy of prorated dues so that a new member joining part way through the fiscal year is not penalized. Some Leagues have adopted a system of anniversary dues which spreads the work of billing members throughout the year and assures each member of a full year's membership before rebilling. This required a change in the bylaws, Article VI, Section 2. Billing dues on an anniversary basis is usually more work for a treasurer. Local Leagues should send membership changes to LWVUS and LWVNYS monthly or bi-monthly because their computers provide the mailing labels for both the national and the state Leagues. This will ensure that new members receive publications promptly.

PER MEMBER PAYMENTS
Per member payments to the state and national Leagues are due on the first day of each quarter: July 1, October 1, January 1, April 1. However, the first quarter payments are not billed until after the adoption of the state and national budgets. Both LWVNYS and LWVUS send local Leagues the forms used to pay these bills. The state forms are sent to treasurers quarterly; the first in June for July 1 payment, etc. Prompt payment of the PMP installments is very important since both state and national have fixed operating expenses which must be paid each month.

Leagues that fail to pay 100% of their LWVUS and LWVNYS PMP as assessed each year lose their state and national convention voting rights.

USE OF TAX DEDUCTIBLE CONTRIBUTIONS TO PAY NATIONAL AND STATE PMP
The use of Grants Management funds to pay state PMP is an option. LWVNYSF will still honor requests to make voluntary contributions to the LWVUS Education Fund.
HAS YOUR LEAGUE/MAL UNIT FILED ITS FORM 990-N YET?
(If you are a MAL Unit and have applied for an EIN # and you applied for it as a non-profit you will need to file a 990N.)

All Leagues/MAL Units that receive less than $25,000 in income must file an e-postcard return (also known as Form 990N) every year. The only exceptions are Leagues that are included in their state League’s group return or that file the more complicated Form 990 or 990-EZ. Most Leagues have successfully completed the form, though some have not.

Form 990-N is entirely web-based; there isn’t a paper version. The form is short and shouldn’t take much time to complete. To fill out the form, go to http://epostcard.form990.org/ and follow the instructions.

TECHNICAL SUPPORT
If you encounter any difficulty logging on to the Form 990-N website, please call their tech support at 866-255-0654 or email epostcard@urban.org.

ANSWERS TO FREQUENTLY ASKED QUESTIONS: http://epostcard.form990.org/frmtsFAQ.asp

WHO MUST FILE FORM 990-N?
All nonprofits with gross receipts "normally" under $25,000 must file Form 990-N (this requirement began in tax year 2007). Your receipts will satisfy the "normally" requirement if they averaged $25,000 or less in the prior three consecutive tax years, including the year in which the return would be filed. For tax year 2010, the $25,000 threshold for filing will go up to $50,000, so more small nonprofits will be eligible to file the e-postcard in 2011.

HOW DO I FILE THE E-POSTCARD?
The e-Postcard is filed electronically by answering fewer than ten questions in an online form that can be found at: www.irs.gov. When you link to the system, you leave the IRS site and file the e-Postcard with the IRS through our trusted partner Urban Institute. If you have trouble linking to the filing system through the IRS website, the URL for the Urban Institute site is http://epostcard.form990.org. The form must be completed and filed electronically. There is no paper form.

WHEN IS THE E-POSTCARD DUE? HOW OFTEN DO I NEED TO FILE?
The e-Postcard is due every year by the 15th day of the fifth month (4 months and 15 days) after the close of your tax year (same as your accounting period). For example, if your tax year ended on December 31, 2007, the e-Postcard is due May 15, 2008. If you do not file your e-Postcard on time, the IRS will send you a reminder notice but you will not be assessed a penalty for late filing the e-Postcard. However, an organization that fails to file required e-Postcards (or information returns – Forms 990 or 990-EZ) for three consecutive years will automatically lose its tax-exempt status. The revocation of the organization’s tax-exempt status will not take place until the filing due date of the third year.

INFORMATION YOU WILL NEED TO FILE THE E-POSTCARD
The e-Postcard is easy to complete. All you need is the following information about your organization. Click on any of the links below, if you need more information about the item.
- Employer identification number (EIN). If you do not know what it is, the state League does.
- Tax year
- Legal name and mailing address
- Any other names the organization uses
- Name and address of a principal officer
- Web site address if the organization has one
- Confirmation that the organization’s annual gross receipts are normally $25,000 or less
- If applicable, a statement that the organization has terminated or is terminating (going out of business)
HOW TO FILE FORM 990-N

Filing Form 990-N is so simple that, technically speaking, the IRS doesn't even consider it to be a tax return. It should take you no more than ten or 15 minutes to complete. You don't even need to pay for a postage stamp to mail it to the IRS, because it must be sent electronically -- paper copies of the form will not be accepted. This is why the IRS calls the form an "e-Postcard."

Form 990-N is filed online through a website operated by the Urban Institute, a large nonprofit that has helped the nonprofit community with IRS compliance issues for many years. You do not need any special software, just access to the Internet and an email address for your nonprofit. Once you log on to the Urban Institute's website at http://epostcard.form990.org/ (or go to www.irs.gov and search for "990-N"), you will be asked to create an account before you can access the system. You'll need your nonprofit's employer identification number (EIN) to do this.

You then complete an online form that asks for your nonprofit's legal name, address, website address (if any), EIN, name and address of a principal officer (usually the president, vice president, secretary, or treasurer), and tax year (either the calendar year or a non-calendar fiscal year). You will also be asked whether your nonprofit has terminated or gone out of business.

After the form is completed, you just need to click the "Submit Filing to IRS" button. The IRS will notify you by email once your e-Postcard is accepted or rejected. If it's rejected, the IRS email will contain instructions on who to contact to resolve the problem. If your Form 990-N is accepted, you can see a copy by clicking the "view" button. Be sure to print out a copy for your own files. For more information on filing Form 990-N (e-Postcard) see the IRS website at www.irs.gov/charities/article/0,,id=169250,00.html.

STEP BY STEP INSTRUCTIONS FOR FILING OUT THE 990-N (e-POSTCARD)

STEP ONE:
Go to www.irs.gov
STEP TWO
Click on “Charities & Non-Profits”
(Which will be the third button from the left, under the IRS Logo)

STEP THREE
Click on “Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N (e-Postcard)”
(You will find this in the middle of the page under the people grasping hands)

STEP 4
Under the boxed section “How to File” click on the word “here” to begin the process.
STEP 5
Click the button that says “Leave IRS Site”

STEP 6
Click on “STEP 1: Register as a New User”
STEP 7
Click “Next”

STEP 8
Enter Your Organizations EIN # and then click “Next”
STEP 9
Enter Your Organizations EIN # and then click “Next”
The page below will pop up w/your Login ID (which is YOUR EIN #), BUT, it will say: “League of Women Voters of New York State Inc. because we are the parent organization and because there is not enough room in the field to also put your League/MAL Unit name. As long as you see your EIN #, the form is corresponding to your League/MAL Unit.

STEP 10
Refer to Illustration under Step 9
a) Create a password
b) Verify the password
c) Enter your First Name
d) Enter your Last Name
e) Enter your E-mail Address
f) Verify your E-mail Address
g) Fill in your Daytime Telephone # and
h) Click the “Next Button”

STEP 11
Check your E-mail for an e-mail from the IRS confirming your password

STEP 12
Click on the hyperlink in the e-mail, which will take you right back to the 990-N (e-POSTCARD)

STEP 13
ANSWER THE QUESTIONS OR REVIEW THE ANSWERS THAT ARE THERE
Tax Period – should be filled in already
Has your organization been terminated or gone out of business? Yes or No
Are your gross receipts $25,000 or less? Yes or No
Name of Organization (which will be LWVNYS---see reasoning for that in STEP 9)
EIN (Employer Identification Number) --- your EIN, not LWVNYS EIN
Organization Legal Name---LWVNYS
If your organization conducts business by another name---SKIP
Organization mailing address
Principal Officer
Type of Name: Person
Name / Address

SUBMIT
**FEDERAL FORM 990-T - UNRELATED BUSINESS INCOME TAX**
- Any League which makes less than $1,000 gross (before deduction of expenses) in a year from unrelated activities does not need to be concerned. No filing is necessary.

If more than $1,000 is earned, a Form 990-T must be filed even though no tax may be due because of allowable deductions.

The Internal Revenue Service examines each case on its own particular circumstances so only broad guidelines are given here. An "Unrelated Business Activity"
- Is not directly connected with the exempt purpose,
- Is performed on a regular or continuous basis,
- Has a substantial part of the work done by non-volunteers and
- Grosses over $1,000 a year.

If all these elements are present, a return must be filed, even though no tax may be due. New York State follows the federal law and regulations, and a state tax return would also have to be filed.

**1099 MISCELLANEOUS AND 1096 TRANSMITTAL - NON-EMPLOYEE COMPENSATION**
If you purchase any service (accounting, legal, typeset, printing, etc.) from an individual (not a corporation) in an amount of over $600, you must file Form 1099 Misc. together with Form 1096 by January 31 of the year following the purchase.
Make sure you ask the individual for his/her social security number or employer identification number at the time of purchase. This number is necessary to file the forms.

**PAYROLL TAXES**
If any League has employees and is uncertain of tax forms to be filled, call:
- For Federal - 1-800-225-0717 for "Circular E" "Employee Tax Guide"
- For State - 1-800-462-8100 for "WT100" "NYS Withholding Tax Guide"

**NEW YORK STATE SALES AND USE TAX**
- In New York State every local League collects tax on items it sells and pays sales tax on items it buys.
- General Procedures: Every local League must have a certificate of authorization (resale certificate) to collect sales tax. A certificate can be obtained from the New York State District Tax Office, Sales Tax Bureau. (Please Note: This is the state, not the federal district office.) A new treasurer should check with the former treasurer for the League's resale number. If none is on file, check with the state District Tax Office which should have a record of the number. This is usually your employer ID #.
- The League of Women Voters of New York State does not charge sales tax on publications sold to local Leagues if a resale certificate has been filed with the state League.

All Leagues must:
1. Collect sales tax on all sales of publications and merchandise except to exempt organizations or sale for resale if you have a resale certificate in your file. It is the obligation of the person or organization seeking to avoid sales tax to provide you with a copy of this certificate.
2. Receive "Form ST 119.1" Exempt Organization Certification before not charging sales tax. This can be obtained at any state district tax office.
3. Pay sales tax on all products and publications (including LWVNYSEF) purchases unless used for resale (sales tax is collected when item is sold) or for out-of-state sales. You must send vendor (including LWVNYS or LWVNYSEF) your resale certificate.
4. If no sales tax is paid at time of purchase and item is not resold, you must pay use tax.
5. If you collect sales tax or owe use tax of over $250 a year, you must file "Form ST 100 or ST 102" quarterly on the 20th of March, June, September and December.
6. If you do not collect sales tax or owe use tax of over $250 a year, you can file form "ST 101" annually on June 20 and report sales or use tax from June 1 - May 31.

Sales and use taxes are reported on same tax form and are the same rate.

**GRANTS MANAGEMENT**
Please be reminded that we must have your requests for funding in advance of the project. Please refer to the Grants Management Section for further information and a sample budget.
NEW YORK STATE CHARITIES REGISTRATION

REGISTRATION

Leagues that solicit or receive contributions in excess of $25,000 annually and Leagues that pay anyone for fundraising (regardless of the amount of contributions solicited or received) are required to register with the Charities Bureau.

When the League's income from all sources exceeds $25,000 for the first time, complete NYS Form CHAR 410 (obtained from Office of the Attorney General, Charities Bureau, 120 Broadway, New York, NY 10271) or online at http://www.oag.state.ny.us/charities/charities.html and pay a one-time $25 registration fee. Once registered the local League will receive a Charities Bureau registration number and written confirmation of its registration.

ANNUAL FILING

Once your organization has registered, the Charities Bureau requires an annual filing. If gross receipts for the filing year exceed $25,000 CHAR500 must be filed along with required attachments and fees. If in any year after registering gross receipts fall below $25,000 League’s must still file but claim exemption. If your local League has total revenue over $25,000 an accountant versed in proper filing and compliance procedures should be consulted. Annual filing is required within six months of the end of the local League fiscal year. Complete filing instructions are available at the above referenced website.

1. Leagues receiving up to $100,000 in total revenue (on Part I, line 9 of the IRS Form 990EZ or, Part I, line 12 of the IRS Form 990 or 990PF):
   a. File Form CHAR 500 and attached Form 990EZ, 990, or 990PF with all attachments and the IRS Form 990-T, if applicable, (neither an independent public accountant's review nor opinion is required).
   b. Fee $10.

2. Leagues receiving over more than $100,000 but not more than $250,000 in total revenue (on Part I, line 9 of the IRS Form 990EZ or, Part I, line 12 of the IRS Form 990 or 990PF ):
   a. File Form CHAR 500 and attach either Form 990EZ, 990, or 990PF with all attachments and Form 990-T, if applicable. (independent public accountant review report and financial statements are required as attachments.
   b. Fee $10.

3. Leagues receiving over $250,000 in total revenue (on Form 990, line 12):
   a. File Form CHAR 500 and attach Form 990 with all attachments and Form 990-T, if applicable. (independent public accountant review report and financial statements are required as attachments.
   b. Fee $25.

Additional filing is required under certain conditions:

1. Any organization that contracts with a professional fundraiser (PFR) or fund raising counsel (FRC) during the reporting period must pay a filing fee of $25, regardless of local support and revenue and file additional schedules detailed on the above referenced website.

2. If your local League has a foundation 501 © 3, you will need to register, separately.

*SEND COPY OF FORM FILED TO STATE LEAGUE OFFICE:
62 Grand Street, ALBANY, NY 12207*
ACKNOWLEDGMENT OF DONATIONS

No charitable deduction will be allowed for donations of $250 or more after 1993 unless the giver has written substantiation of the gift from the charity. This new law rule applies to any type of donation. If a donation is made by check, the canceled check isn't good enough anymore.

Congress says the charity's written acknowledgment of the gift need not be in any particular form. It can be a letter, a postcard or a computer-generated form and does not have to include the donor's Social Security number (or other taxpayer ID number). But it must "provide information sufficient to substantiate the amount of the deductible contribution." If the donor gives property worth $250 or more, the receipt must describe the property (but the charity need not value the property). Present rules require taxpayers to file certain information (on Form 8283) if a deduction for all non-cash contributions exceeds $500. That was not changed.

The written acknowledgment the donor receives must contain an estimate from the charity of the value of any goods or services received in exchange for the gift. If no goods or services were provided, the receipt must say so. If a donor gives $250 or more to a religious organization and receives an intangible religious benefit in return (e.g., admission to a religious ceremony), the organization's acknowledgment must state that the benefit was furnished. However, the organization need not describe or value the benefit.

The substantiation requirement is imposed on the gift givers--no receipt, no deduction. Donors who need a receipt do not have to get it at the time they make the gift. It can be obtained any time before filing the tax return for the year of the donation.

Another part of the new law requires charities to inform donors how much of their donations are deductible when a donor receives anything of more than token value in exchange for a donation --a dinner, for example. This new disclosure requirement applies to donations of more than $75 (even those under $250 that do not have to be substantiated) where the donor makes the gift at least partially for goods or services provided by the charity. So, for example, if a charity receives a $100 contribution from a donor in exchange for a $40 dinner, the charity must inform the donor in writing that only $60 is deductible. The disclosure must be made for gifts after 1993, either when the donation is solicited or when it's received.
CALENDAR FOR TREASURERS

April
- Remit quarterly PMP payments to LWVNYS and LWVUS.
- Set up bookkeeping sheets for the new year if April 1 is start of fiscal year.
- Prepare for audit.

May
- If there is a new treasurer or president, be sure to change signature file cards with bank and any investment entities.
- Send name of treasurer to state office even if current treasurer is continuing in office.
- Send to state office one copy of the treasurer's annual report for the preceding year.
- Send one copy each of the adopted budget for the current year to LWVNYS and LWVUS.

June
- New York State Sales and Use Tax: annual filing deadline is June 20.

July
- Remit quarterly PMP payment to LWVNYS and LWVUS. Bills are mailed after state/national conventions.

August
- Form 990 Federal Organizations Exempt Form Income Tax is due August 15 if fiscal year begins April 1. (Form is due on the 15th day of the 5th month after the end of the fiscal year.) Also applies to Form 990EZ, Notification of Exemption.
- Federal form 990T is due August 15 if fiscal year begins April 1.
- Federal Form 990-N (e-Postcard) due August 15 if fiscal year ends April 1 and gross receipts less than $25,000.
- New York State Department of State Charities Registration form CHAR 500 due August 15 if fiscal year begins April 1.
- If planning to use funds from LWVNYSEF for a voters service project, submit a proposal to LWVNYSEF in time for approval BEFORE the project begins.

October
- Remit quarterly PMP payments to LYVNYS and LWVUS.
- Payment due to LWVNYS upon receipt of Facts for Voters bill.

November
- Participate in budget committee to develop next year's budget.

December
- Work with membership director on annual membership count.

January
- Remit quarterly PMP payments to LWVUS and LWVNYS.
- Annual membership count due to LWVNYS and LWVUS.

March
- Prepare to close books at the end of the month if March is end of fiscal year. Send dues notices if April is start of fiscal year.

Note: Many local Leagues use a fiscal year which begins July 1. In that case, the August 15 deadlines given above should be changed to November 15. Books should be closed at the end of June and dues notices sent out in June.
ANNUAL AUDIT

The financial records of your League, including those of a local League education fund if you have one, should be reviewed at the close of each fiscal year. Such audits assure that your League's books and records are being properly kept. They can be important to the state and federal governments, to donors and members who trust that contributions and dues are being handled properly, and to your own confidence in the accuracy of your bookkeeping.

The treasurer can assist with the audit but should not be responsible for its report. Your League may be fortunate enough to have a member who is an accountant and willing to audit the books for a small fee or no charge. If not, a small committee of members, including off-board personnel, can do an informal review. The following procedures should be used by such a committee.

Start with bank statements...
Check the cash receipts journal against the deposits on bank statements and investigate discrepancies. Are all interest payments recorded?

Verify bank reconciliations throughout the year. Account for all checks by number (recorded on the statement, outstanding or voided). Total all checks for the year and compare with amount reported on statements.

Then review dues...
Check dues collected during the year against current membership total. Understand reasons for discrepancies (transfers, scholarship members, deaths, etc.)

Vouchers...
Check journals against vouchers and investigate discrepancies. Are all expenses backed by an invoice or voucher? Are items being debited to the proper account?

Taxes...
If applicable, recalculate sales/use tax owed New York State and compare with amount paid.

Budget...
Compare income and expenses with budgeted amounts.

and LWVUS Education Fund and LWVNYS Education Foundation...
If applicable, check transactions between your League and both of these funds. What amount is available to your League? Is the fund being used? If not, why not?

Then do some math...
Recalculate a sample month and verify totals overall and for individual categories of income and expenditures. Check beginning balance, receipts and expenditures, and balance. Make necessary adjustments (corrections).

You may have to check other months and make adjustments if a consistent error is found or balances are discrepant.

Return to the bank statements...
Verify amounts in checking and savings accounts at beginning of year and end of year.

The goal of the review is to assure accuracy. Discrepancies should be understood and adjustments made before an auditing report is made. The signed report may be worded as follows: "We have reviewed the books of the League of Women Voters of _____ as of (last date of fiscal year), records of revenue and expenditures, and traced beginning and ending cash balances to bank statements. The books are an accurate reflection of the financial condition of the League of Women Voters of _____ as of (last date of fiscal year) and the results of its operations and cash flows for the year then ended."

Note that handling all transactions by check facilitates the treasurer's job and that of the auditor. If you have cash income, receipts with duplicates should be made. If you have many small transactions, establish a petty cash fund, obtain appropriate receipts for expenditures and periodically charge them to the appropriate budget line item. Then reimburse the fund. Insist on receipts for everything. You and your auditor won't regret it.

***Thanks to the League of Women Voters of New Jersey and the League of Women Voters of Massachusetts for providing the basis for this memo.
LIABILITY COVERAGE FOR LOCAL LEAGUES

The League of Women Voters of New York State, Inc., the League of Women Voters of New York State Education Foundation and all affiliated local League chapters presently chartered in the State of New York and which may be chartered during the policy term are covered under one insurance policy. The League of Women Voters of New York State is paying the cost of this policy.

The policy includes liability coverage including personal injury. The limit of liability is $1,000,000 per occurrence and covers the League for liability, personal injury, non-owned and hired auto liability, and medical payments of $5,000 per person. The League of Women Voters and all local Leagues are covered for the amounts, which they become legally obligated to pay as damages because of bodily injury, and property damage from covered perils, up to the policy limit, except for certain exclusions as listed on the policy. The policy will also pay the cost to defend such suits.

This policy does not cover any office or premises that a local League may own, lease, rent, or occupy on a long-term basis. If the local League rents office space, or a storefront to operate a second-hand shop, no coverage is offered by this policy. There is also no coverage if the local League purchases a building and then leases it to another party for any purpose.

At times insurance certificates are requested when local Leagues meet at schools, libraries, malls, etc. These certificates are proof of our insurance. The state League provides proof of insurance to local Leagues at no charge.

INFORMATION YOU WILL NEED TO OBTAIN A CERTIFICATE OF INSURANCE

1. DATE & TIME OF THE EVENT

2. LOCATION
   This must be the physical address of event, including the zip code
   i.e.: Brown School
         123 Main Street
         Anywhere, NY 12345

3. TYPE OF EVENT
   i.e.: Candidate Forum, Membership Meeting, Garage Sale, Debate, Informational Seminar, LeaderSpark Meeting…

4. PROOF NEEDED BY/CERTIFICATE HOLDER
   This must be a complete address, the answer to this question could be the same as the answer to #2, but there are exceptions, such as when events are held at High Schools, and the School District is the entity that requires proof of insurance

5. REQUEST TO BE LISTED AS AN ADDITIONAL INSURED ---YES/NO
   Sometimes the person requesting the certificate asks to be listed as an additional insured. If you answer YES, you must provide a complete address, once again, this could be the same answer as #2 or #4

6. PROOF SHOULD BE MAILED TO:
   Once again, a complete address must be provided.
LOCAL LEAGUE USE OF TAX DEDUCTIBLE FUNDS

The League of Women Voters of New York State Education Foundation (LWVNYSEF) is a foundation set up to obtain grants for the League of Women Voters of New York State educational activities. It has two parts—the General Fund and the Grants Management Fund.

The LWVNYSEF General Fund supports educational activities of the state League—such as special educational projects, debates, production of Facts for Voters and other purely educational publications, etc. The LWVNYSEF raises tax-deductible money from individuals and corporations to support these projects.

The LWVNYSEF Grants Management Fund receives tax-deductible funds raised by local Leagues. These funds are reserved for local League use for such projects as purchase and distribution of Facts for Voters within a local community, production of a local directory of government officials, local candidate debates, student conferences, Know Your Community books or other projects that could be considered educational.

WHAT IS LWVNYSEF'S TAX STATUS?

Classified as a "Public Charity" by the Internal Revenue Service, LWVNYSEF has tax exempt and tax deductible status. It is known as a 501(c)3 organization; documentation is available to contributors. (Contributions to the League of Women Voters, a 501(c)4 organization, are not tax deductible for the contributor.)

HOW CAN LWVNYSEF ASSIST YOUR LEAGUE?

If you think that contributors to your League will increase the amount of their contributions if they are tax deductible or that your League would receive increased numbers of contributions if they are tax deductible, then it is worth making that opportunity available. This means that these contributions would be in the form of checks made out to the League of Women Voters of New York State Education Foundation. You would send them to the LWVNYSEF Grants Management Fund and the money would be held for use by your League.

However, LWVNYSEF is NOT a bank. Contributions received and held for local Leagues are NOT deposits and cannot simply be withdrawn. The foundation has, by law, a monitoring function over the way in which its funds are spent. In essence, this means that it must approve projects which are funded by it and assure that the grant money is spent in accordance with the grant description. No administrative fee is charged at this time.

PROCEDURES FOR LOCAL LEAGUES

A local League raises funds and sends them on to the state League office, attention: Grants Management. Individual donors must make checks payable to LWVNYSEF. Small contributions are discouraged to protect a League's ability to raise non-tax deductible funds and to minimize the administrative burden. Contributions should be sent with a cover letter listing the names and addresses of contributors. Local Leagues will receive an acknowledgment and a report of the current balance. Local Leagues are responsible for sending thank you letters for donations made to their grants management accounts. (See sample enclosed.)

All contributions received for a League will be held by the LWVNYSEF until the League requests those funds for a particular project. Requests should be sent to the state League office. A grant will be made based on a brief description and an accompanying budget. If funds are to be raised for a specific project, approval should be requested in advance of fundraising. All requests for funds must be made before any expenditures for projects are made. (See sample enclosed)
WHAT KINDS OF PROJECTS WILL THE FOUNDATION FUND?
LWVNYSEF funds must be spent on educational activities. LWVNYSEF cannot fund any activity which seeks to influence legislation or which would benefit only League members. See LWVNYS publication, “Guidelines for LWVNYS Education Foundation Local Grants Management Service” for details available at http://lwvny.org/. Projects must be for the public in general. Suitable projects include all voters service work; publication and distribution of town government studies, directories and other educational publications; fact sheets; conferences, meetings, seminars, radio and TV programs on topics of public interest; citizen education programs on governmental issues for students or newly naturalized citizens; discussion, parliamentary procedure, practical politics workshops for the community (note that League members are part of the community).

A project of enough size and substance to require a grant of at least $50 is needed.

WHAT COSTS WILL A GRANT COVER?
A grant can cover direct out-of-pocket expenses (printing, rental of meeting rooms, honoraria, postage, telephone, etc.), overhead (appropriate percentage of office rent, use of office machines), staff time, professional fees, administrative expense, public relations, committee meetings, etc. A project may be partially funded, with other funds coming from fees, sales of publications or regular League funds.

PROCEDURAL GUIDELINES
1. Define and describe the project, and prepare a budget. Sample budget form follows. The state League office will be happy to advise regarding the suitability of a project or to assist with writing a proposal.
2. Submit description and budget to LWVNYSEF. The state League office will advise the local League within two weeks whether or not the project is suitable.
3. Raise the money. Checks should be mailed as received. Let LWVNYSEF know if the gift is restricted for a specific project.
4. Request the funding. This must be done BEFORE the project is started. A formal request should be made, based on the amount already received by LWVNYSEF. Partial funding can be obtained if a local League has been unable to raise the entire amount. A check covering the grant can be expected within two weeks. Please note that, except in the case of a long or multi-faceted project (e.g. a spread-out series of TV programs), only one grant can be made. LWVNYSEF cannot distribute money to a League as the money comes in.
5. After the project is completed, submit a final report. This should describe what was done and evaluate the results. Include samples of material, and in the case of a publication, enclose a copy.
SAMPLE PROPOSED BUDGET

Project: (name or brief description)

Operating Expenses:
- Materials (incl. purchase of publications)
- Printing or duplicating
- Office supplies (incl. telephone and postage)
- Rentals
  $_________

Equipment:
- Displays (easel, tables, etc.)
- Visual and Sound (projectors, sound, tape recorders)
- Transportation (bus, truck, etc.)
  $_________

Personnel Service:
- Secretarial and clerical services
  (% of regular staff time or cost of services purchased for project)
- Professional, editorial, artistic, services, etc.
  $_________

Other:
- Committee Expense (travel, parking, etc.)
- Public Relations
- Overhead (% of general expenses)
  $_________

  **Total Expense**
  $_________

Less Expected Income:
- Sale of publications
  $_________
- Admission fees
  $_________
- Conference Registration
  $_________

  **Total Income**
  $_________

  **Amount Needed for Project**
  $_________

The sample budget above is for purposes of crafting a budget. The Project Approval/Project Withdrawal Form should be used for purposes of obtaining project approval. After funds have been raised, the Deposit Form should be sent in along with the deposit. Be sure that checks are made payable to the LWV NYS Education Foundation. After the project is complete send a final report on the Final Report Form. All three forms reference above follow this page.
GUIDELINES FOR LWVNYS EDUCATION FOUNDATION
LOCAL GRANTS MANAGEMENT SERVICE

THE PUBLICATION WITH FORMS, MAY BE FOUND ON THE STATE LEAGUE WEBSITE OR OBTAINED FROM THE STATE LEAGUE OFFICE.

POLICIES ON PMP AND ARREARS

The state PMP will be waived for students under the age of 25 enrolled in school. Local Leagues can set student dues at any amount, not to exceed $25.

POLICY REGARDING PMP ARREARS

The per member payment (PMP), which provides financial support for the state and national Leagues, is adopted by delegates attending state and national conventions. When local Leagues fall behind in their PMP payments to the state League, the following policy will be followed:

1. If a PMP payment is overdue by six weeks, an arrears letter will be sent to both the president and treasurer of the League. At the same time, a list of all non-paying local Leagues will be given to the membership vice president or designated representative.

2. If the League still has not paid one month after the state League has sent the arrears letter, the membership vice president or designated representative will be informed and asked to follow-up by contacting the president and/or treasurer. This may be done by phone, visit, or personal note.

3. If the League still has not made payment two months after the state League's letter was posted, the membership vice president or designated representative will be asked to contact the local League directly. At the time of this visit, the local League will be asked to prepare a payment plan. The or membership vice president or designated representative should offer the assistance of the state board in helping to write the payment plan and in helping to restructure the League's finances if needed. Immediately following the next board meeting of the local League, at which time they shall be asked to adopt the payment plan, the plan should be submitted to the state board.

4. If a local League has not met its PMP responsibilities, it will not be entitled to voting/privileges at convention. The LWVNYS board may make an exception in the case of proven hardship.

5. If the local League has not responded or prepared an acceptable payment plan the state board may initiate disbandment procedures.

(Revised and Adopted 3/2008)
BUDGETING FOR GROWTH - THE COMMITTEE AT WORK

JOB DESCRIPTION: BUDGET COMMITTEE CHAIR

OBJECTIVES: To prepare and present an annual budget for the League.

RESPONSIBILITIES:
1. Chair the budget committee.
2. Request budget suggestions and projections from board members.
3. With the assistance of the committee, prepare proposed budget for submission to the board. See that the proposed budget reflects the League's priorities, programs and goals.
4. Present the proposed budget to the board and consider changes recommended by the board.
5. Present the proposed budget to the membership through the bulletin in compliance with deadline imposed by the bylaws.
6. Present the budget to the annual meeting. Revise the budget as directed and send budget as adopted to the treasurer.

********************

A good budget should be regarded as one of the most effective tools a local League possesses. Properly conceived and skillfully administered, a budget is a versatile instrument which can be used productively in many aspects of a League's activities.

A budget is a plan for your League's activities during the next fiscal year. It should:
- Establish priorities
- Establish objectives
- Serve as a guide to the board

The budget committee plays a key role in providing for the health and growth of a League; the selection and preparation of its members merit careful attention by the board. A board will be helped in carrying out its responsibility if it thinks of the committee as a planning group who will:
- Evaluate the effectiveness of the League in the community,
- Gather and sift fresh ideas for improving League effectiveness,
- Produce a forward-looking budget plan for bringing the League closer to its goal of building a stronger League and a better community.
RECOMMENDED BUDGET PROCEDURES

COMPOSITION OF THE BUDGET COMMITTEE
The budget committee usually includes the president ex officio, the treasurer, the finance chair, and several others, some of whom should be non-board members. Check local League bylaws to see what direction is given about the committee's composition and its duties.

1. The Chair
   - The chair coordinates the work of the committee. She/he presents the proposed budget to the board and the board-recommended budget to the membership for approval at the annual meeting. The chair should do the following:
     - Determine the committee's timetable.
     - Obtain the minutes of all League board meetings for the past year to become familiar with the matters discussed which impact on the budget.
     - Compile short and long range planning ideas from board and membership.
     - Provide each committee member with copies of the local League bylaws and current budget updated with the figures for the actual income received and expenditures incurred to the date of the first committee meeting.
     - Obtain an accurate count of the League's single and household memberships as of February 1 so that the budget will properly reflect the county, state and national per member payments due.
     - Using membership figures, determine the correct number of delegates which your league is entitled to send to state or national convention as to properly budget for their attendance.

2. The Treasurer - ex officio
   - An essential member of the budget committee, the treasurer is the person most knowledgeable about the League's financial data and the most able to provide budget estimates.

3. The President - ex officio
   - The president knows most about the current activities of the organization, sees the total League picture and has information about the direction and capabilities of the local league.

4. The Finance Director
   - As the person most involved with raising money from the community, the finance director is an invaluable asset to the group.

5. Other Members
   - To gain a broad cross section of membership ideas, choose a new member as well as some of your past members to serve on the committee. A new member can offer fresh eye to the way things have been done.

A CALENDAR FOR THE BUDGET COMMITTEE
As soon as possible after the annual meeting, the board appoints a budget chair and committee.

Winter
   - Committee meets to establish priorities and objectives based upon the input obtained from League members and the board. Cost estimates for priorities and objectives are developed.
   - Proposed budget is completed and presented to the board.
   - Board approves or revises proposed budget.
Spring (consult local League bylaws for the time requirements)
- Recommended budget and message are printed in bulletin.
- Chair presents budget at the annual meeting.
- Membership adopts budget as presented or amended.
- Adopted budget is printed in bulletin or member handbook. Copies are sent to state and national Leagues.

THE BUDGET COMMITTEE BEGINS ITS WORK
The first task of the budget committee is to discuss with members and leader their thoughts and ideas regarding what the League should be doing and in what areas it needs and wants to grow.

Ask members what their hopes and aspirations are for the League:
- To mail voters guides to every citizen?
- To improve communications with the community?
- To become a strong political force in the community.

Ask leaders to discuss certain philosophical considerations:
- Does your League have the ability to raise necessary income to realize their hopes and aspirations?
- What proportion of your budget should be covered by dues income?
- Did you consider that human resources spent on fund raising are human resources that may not be spent on League program?

Ask leaders how they perceive the League's potential and opportunities for maintaining or growing and expanding services:
- Does the current budget provide enough money to effectively carry out your portfolio plans for the year?
- If not, what plans will be left unrealized?
- What would you like to see accomplished in your field next year?

The information gathered from listening to members and leaders can provide a basis for discussion regarding the directions the League should pursue.

THE QUALITIES OF A GOOD BUDGET
- **Imaginative**
  A good budget converts creative ideas into realities by translating them into costs and then incorporating these costs into the budget.
- **Comprehensive**
  A good budget accurately reflects every facet of League activity.
- **Realistic**
  A good budget accurately reflects all anticipated expenditures and accurately reflects the ability to raise the income needed to finance the League.
- **Flexible**
  A good budget is specific enough to help the boards planning and general enough to allow for unexpected expenditures and changing needs.
THE BUDGET DOCUMENT

First prepare a working budget draft as follows:

1. Plan the work to be done and then consider how to raise the money.
2. Remember that a vital part of the League's work is to send its full complement of delegates to conventions. This provides future leadership and continuity. If you don't budget for it, it won't happen.
3. Prepare a gross budget which accurately portrays League's work to the members and to the public. ALL income and ALL expenditures should be included.
4. Don't be constrained by the local League budget form. Add or delete categories to suit particular needs.
5. Instead of footnoting comments at the end of the budget, include this information in a column at the extreme right. The comments will then appear on the same line as the budget item. Making the budget document easier to read and understand.
6. Prepare a short budget message which succinctly states the League's fiscal philosophy and the budget committee's objectives. Changes in format, focus, new projects and other matters which merit attention should be mentioned. From this message the members will understand the League's priorities and objectives.

When you have completed creating the budget draft, analyze it, answering the following questions:

1. How do the budgeted amounts relate to the priorities identified by the board?
2. What percent of the budget is spent on service to the community? How does this amount compare with the amount spent on internal needs—administration and delegate expenses?—on activities?
3. Has the League budgeted to send delegates to League conventions/councils, and other state training?
4. Should the budget provide reimbursement for expenses of members doing League business?
5. Has the League budgeted for inflation?
6. Does the budget address your League's weaknesses; e.g., member recruitment, local program and/or action, finance?
7. Do local League dues cover financial support for all levels of League?
8. Should bulletin costs be offset by income from ads or by dues?
9. Does money raised in the community (non-member contributions, publications, sales, fund-raising activities) cover services rendered to the community?
10. How much does this League hold in its reserve fund (interest-bearing account)? Recommended reserves are one-fourth of the annual budget, unless you have large fixed expenses for an office, in which case reserves equal to 50% of the budget would be more appropriate.

When the committee has completed the budget proposal, the budget is presented to the board for suggested changes and approval. The board approved budget proposal is then sent to the membership through the bulletin (see bylaws for time requirements) in preparation for the annual meeting where the budget for the next fiscal year will be adopted.
## SAMPLE LOCAL LEAGUE BUDGET FORM

<table>
<thead>
<tr>
<th></th>
<th>Adopted Budget</th>
<th>Actual</th>
<th>Proposed Budget</th>
</tr>
</thead>
</table>

### INCOME

<table>
<thead>
<tr>
<th>Description</th>
<th>Adopted</th>
<th>Actual</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Dues</strong> (___ household memberships @ $___)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(___ individual members @ $____)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>B. Contributions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Non-Members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Businesses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>C. Publications</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>D. Other</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>E. From reserves</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>F. From reserves deposited with EF</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$____</td>
<td>$____</td>
<td>$____</td>
</tr>
</tbody>
</table>

### EXPENDITURES

<table>
<thead>
<tr>
<th>Description</th>
<th>Adopted</th>
<th>Actual</th>
<th>Proposed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. OPERATING COSTS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Maintenance of equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. General supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Duplicating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Postage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Telephone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Office expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Rent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Salaries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Payroll taxes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Bank charges</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Audit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Capital expenditures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td>$____</td>
<td>$____</td>
<td>$____</td>
</tr>
<tr>
<td><strong>B. BOARD AND ADMINISTRATIVE COMMITTEES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. President</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Board tools and expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Administrative Committees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Finance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Membership</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Unit Organization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Public Relations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Budget</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Nominating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td>$____</td>
<td>$____</td>
<td>$____</td>
</tr>
<tr>
<td><strong>C. DELEGATES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. National Convention</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### FINANCIAL SUPPORT FOR THE LEAGUE

1. **National Per Member Payment**
   - (___) household memberships @ 1 ½ PMP $___
   - (___) individual members @ $___

2. **State Per Member Payment**
   - (___) household memberships @ $___

3. **ILO support**
   - (___) members @ $___

### BULLETIN

1. Supplies
2. Postage
3. Other

### EDUCATIONAL ACTIVITIES

1. **Publications**
   - a. Purchase and distribution
   - b. Production and distribution

2. **Program committees**
   - a. National
   - b. State
   - c. Local

3. **Voters Service**
   - a. *Facts for Voters*
   - b. Voter registration
   - c. Voters guide
   - d. Other

### POSITION SUPPORT

1. **Publications on League Positions**
   - a. Purchase and distribution
   - b. Production and distribution

2. **Action activities (lobbying)**
   - a. National
   - b. State
   - c. ILO
   - d. Local

### GRAND TOTAL

$___ $___ $___
LOCAL LEAGUE BUDGET ITEM BY ITEM

LWV of ___________________________  Budget year ______ to ______

THE INCOME SIDE OF THE BUDGET

A. Dues (___ household memberships @ $__)  (___ individual members @ $____)

The membership figure shown here should be the realistic goal for the coming year. What is your membership count as of January 1st on which your per member payments are based? Can you anticipate a net gain in membership during the next fiscal year? Do the current dues cover per member payments (PMPs) plus bulletin costs?

B. Contributions
   1. Members
   2. Non-members (These are contributions from non-members individuals and from other organizations.)
   3. Businesses

Contributions expected in services ("in kind") should be budgeted as cash contributions. Corresponding costs should be included on the expenditure side of the budget.

C. Publications
   Income from sales of publications.

Publications funded through LWVNYS Education Foundation cannot be sold for profit. However, such publications can carry handling charges and overhead costs to cover all expenses of the League in producing and distributing the publication.

D. Other
   The income from any public meetings or other League activities such as bulletin ads, speakers bureau, go-see trips, League luncheons, fund raising projects, bank interest, etc., should be included here. Income expected from payment of handling charges for tax-deductible publications should also be budgeted here.

E. From Reserves
   Include here all funds accrued in the previous year's budget which will be spent during the current fiscal year (for capital expenditures, for delegates' expenses, and/or publications). This item includes money drawn from savings to balance the budget.

F. From reserves deposited with LWVNYS Education Foundation
   Budget here for withdrawal of tax-deductible funds contributed during a previous fiscal year. (Tax deductible funds expected to be raised during the current fiscal year should appear as contributions under B.)

THE EXPENDITURE SIDE OF THE BUDGET

A. Operating Costs
The budget committee should take into account the actual operating costs from the previous year. To these should be added a fixed percentage to allow for inflation, as well as additional costs in areas of growth or special activity.

1. **Maintenance of equipment**
   Does not include major purchase of equipment (a capital expenditure) but does include servicing, rental, replacement of parts, insurance.

2. **General supplies**
   Includes stationary, envelopes, paper (except for the bulletin), and other office supplies other than permanent equipment. Board and administrative committee general supplies are accounted for under this item.

3. **Duplicating**
   Cost of duplicating materials for board and members -does not include bulletin or large finance or voters service costs.

4. **Postage**
   Postage costs for correspondence, notices of meetings, letters sent by committees and all other postage except bulletins, finance drive and other large mailings which can be charged to a specific item. Includes costs of bulk mail permits.

5. **Telephone**
   All local and long distance telephone expenses incurred by League leaders on League business are listed here. Board members may be reimbursed for League expenses on home telephone bill; also monthly charges for League office phone.

6. **Office expenses**
   Space rented for office or storage, salaries (full or part-time secretarial help) payroll taxes, including social security, unemployment insurance.

7. **Bank charges**
   Since the League is a nonprofit organization, it may be possible to maintain a checking account with no charge. If such charges cannot be avoided, they should be budgeted as an operating cost.

8. **Audit**
   If the League budget is a large one which warrants engaging an auditor's services, these expenses should be budgeted as an operating cost.

9. **Capital expenditures**
   Includes the cost of permanent equipment such as files, typewriter, computer, facsimile machine or copier (whether for home or office) office furniture, etc. If you plan or use funds previously set aside for future purchase of equipment, add a line here "Accrued for new equipment."

**B. Board and administrative committees**

1. **President**
   This should be a realistic allowance for expenses involving official League business (travel, fees, meals when attending non-League meetings, supplies, parking, secretarial services, reimbursement for babysitting). Some Leagues budget a fixed monthly allowance for the president to cover small outside-of-office expenses.

2. **Board tools and expenses**
   Provide for the expenses of officers and board members, other than the president. Include purchase of duplicate state and national president's mailings, *In League* and other
organizational tools for the board. Cost of meeting room for board should also be included under this item.

3. **Administrative Committees**

   a. **Finance**
   
   Cost of committee meetings and materials, letters to contributors, free publications to contributors, and any other costs related to the finance drive and the cultivation of contributors' interest. Postage for large mailing should be assigned here. Gross expenses for special finance projects, such as calendar sale, should be budgeted here and may have individual lines.

   b. **Membership**
   
   Cost of committee publications, card files, membership teas, orientation meetings, kits for new members, publications for prospective and new members, newspaper ads, or any other expense incurred in encouraging people to join and in orienting them as members.

   c. **Unit Organization** (in areas where applicable)
   
   Basic expenses for training unit chairs and discussion leaders; organizing new units, maintaining established units, costs of unit council.

   d. **Public Relations**
   
   Cost of committee publications; cost of publicity for newspapers, radio, and TV regarding League activities, meetings (pictures, entertaining press at meetings); cost of speakers' bureau, free publications to libraries, schools, media, and League awards.

   e. **Budget**
   
   Cost of information for committee members, materials for presenting budget to board and members.

   f. **Nominating**
   
   Committee cost involving attendance at League functions, cost of gathering names from members.

C. **Delegates**

   1. National Convention
   2. State Convention/Council
   3. Legislative Conference
   4. State Training
   5. Other Meetings
   6. Affiliations

Should include a fair estimate of delegate expenses to these meetings (travel, hotels, meals, registration fees). (That part of delegate expenses expected to be paid by delegates should be budgeted under income as a member contribution.) In a year of no convention, part of the expense for the following year can be budgeted here as "Accrued for convention 19__" Include cost of League representative at local meetings of value to League activity and cost of belonging to community groups.

D. **Financial Support for the League**

   1. National Per Member Payment  ____ household memberships @ $____
      (____ individual members @ $____)
   2. State Per Member Payment  ____ household memberships @ $____
      (____ individual members @ $____)
3. ILO Support (___ members @ $___)

Per member payments are based on the number of members as of January 1. Money sent to the state and national Leagues supports such services as state and national Voters; state and national board meetings; staff and offices; program study materials (all program chosen by local League delegates at conventions); leadership, voter service and action publications; leadership training institutes; lobbying activities; and developing new Leagues.

E. Bulletin
1. Supplies
2. Postage
3. Printing
4. Other

Include all expenses of regular local League bulletin such as supplies, printing and mailing costs.

F. Educational activities
Include here only those areas of League activity which are purely educational and do not present a position which the League has taken.
1. Publications
   a. Purchase and distribution
   b. Production and distribution

Publications such as Know Your Community may be budgeted here, as well as program publications which present an impartial viewpoint. In addition, Leagues may budget here for purchase of educational publications they wish to distribute to the community and the LWV membership.

2. Program Committees
Committee plans involving impartial study and impartial community activities may be budgeted here. Expenses of litigation involving enforcement of existing laws and the monitoring of existing laws should be budgeted here. In addition, the cost of committee research may be budgeted in this section if arrangement is made to distribute such material to the public as well as to League members.
   a. National
   b. State
   c. Local

3. Voter Service

It is possible to fund an entire voter service budget through an education fund with tax-deductible money raised by a local League. Therefore, the budget committee should work closely with the voter service committee anticipate and list as accurately and completely as possible each activity for the coming year.
   a. Facts for Voters
   b. Voter registration
   c. Voters guide
d. Other

G. Position support
Expenses of all League activities involving action on League positions should be budgeted in this section. Activity involved with changing laws or creating new laws should be budgeted in this section. Activities in support of League positions are not eligible for tax-deductible funds.

1. Publications on League positions
   a. Purchase and distribution
      Should include purchase and distribution costs of state, national or other publications which support a League program position.
   b. Production and distribution
      Should include costs of producing and distributing local publications dealing with League positions. Flyers urging a yes or no vote on ballot proposals as well as local "Calls to Action," etc. should be budgeted here.

2. Action activities
Action activities include expenses of travel to state legislature (including Legislative Conference), entertainment for officials, letter campaigns, petition campaigns, newspaper ads or public relations related to lobbying for a position, public meetings and rallies.
   a. National
   b. State
   c. ILO
   d. Local
FINANCING THE LEAGUE

"Grand policies would mean nothing if the money was not there to implement them."
- Carrie Chapman Catt, founder LWV

JOB DESCRIPTION: DEVELOPMENT DIRECTOR

OBJECTIVES: To plan/direct/conduct the fundraising activities of the League.

RESPONSIBILITIES:
1. Prepare an annual fundraising plan for board approval, taking into account the goal specified in the budget, as well as the money budgeted for fundraising expenditures. Both direct solicitations and special fundraising projects/events might be included.
2. Initiate and oversee all fundraising activities.
3. Be responsible for the collection of names of potential individual and business contributors. Add new names annually and keep lists up-to-date.
5. Encourage board members to assist with fundraising efforts by providing names of new prospects, making personal contacts when requested and being aware of the funding potential of League activities.

The development director's job is to oversee all fundraising for the local League, with help from a development committee, the board, and the membership. In addition, the DOD should work with the board to develop special projects and identify foundation or corporate sponsors. Without adequate funds, a League's plans can be wasted, its voice mute.

The finance director sets the tone for all finance efforts for the League. She/he looks at the budget of the League and compares it to the many services the League provides the community. There's no doubt that contributors get excellent return for their money. The community is a better place because there is a local League. The finance director is able to communicate this both to the League members and to the potential contributors.

Be alert to League resources which include League fundraising publications, the expertise of other League people in local and neighboring Leagues, and the help of the membership vice president.

Confer with the previous development director. Get as much information as possible on past finance efforts. What worked well and not so well? Why?

If desired establish a committee whose members can be an excellent resource for ideas. The committee is all important in evaluating fundraising possibilities, tapping funding sources, and helping with money making activities. The finance director must believe in the abilities of the committee and in the product being sold—the League.

Questions to consider:
1. What fundraising activities would members most likely support with their time, talents and money?
2. What fundraising activities would the community most likely support with their contributions?
3. How much of the finance money should be sought from the community and how much from League members?
4. How much League time do the board and members want to spend on fundraising: a finance drive and many little money raisers? A finance drive and one major special project? (Of course, there are many possibilities but all combinations should include a finance drive.)

Remember to keep a complete record of activities, results, expenses, press releases and sample letters. Evaluate the work with the committee: What new sources of revenue were tapped? What approaches worked well? Was the goal met? Write specific recommendations as to how procedures could be handled better in the future.

**TAX DEDUCTIBILITY**

Contributions to the League of Women Voters are not tax deductible. All solicitation materials must state this clearly. The League of Women Voters of New York State Education Foundation (LWVNYSEF) is the tax-deductible affiliate of the state League. Local Leagues may solicit contributions to LWVNYSEF. These donations are tax deductible for local League members. They are held by the state League for the sole benefit of educational activities of the local League.

are held by LWVNYSEF Grants Management and can be used for voter service activities and other educational projects, as well as for partial payment of a League's per member payment state and national (PMP) obligation. For details, consult "Grants Management" in this section. For details consult the LWV publication, *Fiscal and Compliance FAQ* available at http://www.lwv.org/AM/Template.cfm?Section=Treasurer&Template=/TaggedPage/TaggedPageDisplay.cfm&TPLID=86&ContentID=9525

**MEMBER SOLICITATION**

Many members are willing and able to contribute to the League above and beyond dues. Give them an opportunity to make contributions on the dues or by a special mailing. Possible member categories include: suffragists, supporters, patrons, President's Club.

**PERSONAL SOLICITATION**

If you are lucky enough to have members or other community residents who are capable making large donations, you may wish to personally solicit them for a general donation or to fund a particular project. We recommend a phone call and home visit. At the visit you sell the League program, and convince the potential donor of its importance. It is often beneficial to leave materials for the individual to review, with instructions to call if they have any questions. Tell them you will call them in a week or two to discuss it further. At the second call you discuss whether they are interested and ask for a donation. It is important to have an idea of the ballpark amount of donation the contributor might be able to afford. Do not be afraid to ask them to stretch. For further information about personal solicitation, contact the state development director.

**PLANNED GIVING**

An excellent way for the League to raise funds is to convince members to remember the League in their retirement planning or in their wills. The state League has developed a brochure that is available for use by local Leagues.
CONDUCTING A FINANCE DRIVE
A finance drive is usually the mainstay of League fundraising and can provide an ideal opportunity to educate the public to the League's presence in the community, its purpose and its program.

Falls seems to be the best time for community campaigns as League visibility is high with voter services activities. Techniques include mail solicitation - printed or hand written - and personal solicitation visits. Use what works best for you.

Much of the work can be done over the summer. Tasks to be done for a mail solicitation include the following:
- Present proposed plan to the board for approval.
- Schedule date of mailing and determine what enclosures to send (many Leagues use *Facts for Voters*). Decide the follow-up to use and what date the follow-up will be implemented.
- Draft a solicitation letter for approval by the president. Give those members who want the tax deduction the ability to make a contribution to the Education Foundation for the benefit of the local League.
- Update the prospect list. The most important task is adding NEW NAMES. Ask board members for names. Include people who have used the services of the League, members of similar organizations, donors to other community groups, local legislators.
- Print letters, address and stamp envelopes for mailing, stuff envelopes. Personal notes may be added by board members only if mailing is going first class.
- Ask your local newspaper editor for an editorial supporting the work of the League. Ask your mayor or municipal official to designate the week that your appeals are mailed as League of Women Voters Week. At the very least, submit a Letter to the Editor requesting support. Feel free to send a copy of an editorial with your mailing.

Follow-up includes:
- When a contribution is received, mail a thank you note. Thank you notes should be mailed within ten days of receiving the contribution. (The solicitation letter can indicate that thank you notes will not be sent in order to save postage. However, if the donation is $250. or more, an acknowledgment must be sent.)
- After three weeks, write a "mop-up" letter to those prospects who have not sent in a contribution. You might also consider having a person who knows a prospect approach him or her directly.
- Deposit monies promptly.
- Leagues may wish to follow through with those who have not contributed. One way to do this is to hold a phone-a-thon, in which League members gather on a particular day and place a call to all those individuals who have not contributed.

Afterwards:
- Return to the database of prospects. Note helpful comments, amount deposited and change of address or status. Consider keeping a prospect on the list for three years before dropping.
- File solicitation letters, results of drive, and comments for the next finance director.

APPROACHING BUSINESSES
Many Leagues include small businesses in their regular finance drives or sell ads to small businesses to cover bulletin costs. (See section on "Bulletins" for information on postal regulations and mail solicitation.) It is frequently more productive, however, to ask larger companies to underwrite specific projects. For example, a bank might be asked to fund community distribution of *Facts for Voters* or a *Voters Guide*. A local industry
might underwrite the cost of distributing packets of League publications to schools and libraries. A high school registration project could be underwritten by a union. A business might be willing to fund students for an education project or an internship.

When preparing a funding proposal, keep in mind what businesses want for their money: a good public image, a good public service, and the best payoff for their advertising dollars. The League's job is to convince the business person that a contribution will improve the business's public image and increase its dollar return. Don't forget to add to your estimated expenses at least 10% for overhead. When your proposal is ready, call for an appointment. Although you should be prepared to discuss your proposal by phone, a personal visit is preferable. In-person solicitation consistently produces more and larger contributions than any other finance technique. The advantage of a personal visit is that it tells the prospect that the matter at hand is an important one to which the fundraiser is clearly, sincerely committed. It allows for optimum, responsive communication and it is harder for the prospect to say no.

Many Leagues approach foundations run by local businesses and local families. Investigate the availability in your area and the type of projects they fund. Over time, it is possible to establish a relationship that will provide a stable source of funding for League activities.

Keep in mind the possibility of in-kind contributions. Maybe a local company could give your League a typewriter or a computer or reproduce your bulletin at no cost. Consider running a wish list in your bulletin of products and services you seek to maintain or enhance operations.

If you have a large company in your area, consider the possibility of making a joint approach with the state League. A member of the state board would be happy to work with you in planning a proposal that would provide the company with statewide visibility. If, as the result of a joint approach, a company is willing to contribute general support funds for the state League, that money is shared with the local League making the approach. Unfortunately, money designated for a special state League project, cannot be shared unless the grant proposal has a local League component written into it.

Major contributors should be kept in mind throughout the year, not just at the time of the finance drive. Send them personal invitations to your candidates night or copies of a new League publication.

SELLING SERVICES
The selling of services often taps a market not available for the finance drive. Churches and service organizations, for instance, may not budget for contributions but can pay honoraria to speakers. Government units and school districts can pay for services such as supervising special elections, reporting election results, or taking a census. Such projects tap members who will not work on finance drives but find this type of project stimulating. When considering the sale of League services, be sure there is adequate person-power to handle the task without abandoning the programs and services for which the members pay dues.

SPECIAL PROJECTS AND SOCIAL EVENTS
In recent years special projects have become a popular way for the League to raise funds. Besides making money, special projects can have such side benefits as providing a good social time for members, recruiting members, generating good public relations, and promoting League issues. What types of projects have Leagues found successful?
Generally special projects require more effort per dollar raised than a finance drive. It should also be recognized that most special projects raise money mostly from League members. Before tackling a special project, devote board discussion time to it. Is this project likely to succeed in the town? With our members? Is there member power, interest, and expertise? Will the event adversely affect League image? Will a special project conflict with the regular finance drive?

**Special Projects include:**
- Publications - Know your Community books - try to pre-sell to real estate agents
- Cookbooks - special angle--low fat, recipes of political leaders
- Sales of products - T-shirts, note pads, etc.
- Flea markets
- Lecture series - authors will reduce fees if you allow book signing
- House tours - careful of insurance requirements
- Community tours
- Bed and Breakfast
- Tribute CardsResale Shop – recycling the League
- Can Recycling Project
- Candles for birthday celebrations

**Social Events include:**
- Luncheons or Dinners honoring local leaders
- Theater parties
- Auctions-Art, Silent, Live
- Mystery Evenings
- Bridge
- Wine and Cheese
- Brunches
- Dessert Parties
- Concerts
- Marathon and shorter runs
- Pot luck suppers
- Used Book Sale

You may wish to combine events, such as a food event with an auction or silent auction. Members who have luxury items may be willing to make donations. Vacation home owners may donate bed and breakfast weekends. Boat owners may donate a fishing trip or cruise. Holders of season tickets to sports events may donate tickets. Good cooks will often donate dinners or catered cocktail parties at your house or theirs. Whenever you sell tickets, you should offer other support categories and list names on the program. When planning events, the key is attention to detail, delegation of responsibility, and clear benchmarks as to when each preparatory activity should occur.
SAMPLE
MODEL OF SPECIAL EVENT PLANNING

Three to Six Months Before Event:
1. Decide on event's purpose and theme
2. Estimate the number attending
3. Secure the facility
   a. determine maximum capacity of site
   b. determine costs and possible menu
   c. request that recyclable products be used
   d. include costs of guest
   e. other - facility rental, custodial charge, audio
4. determine final dates to:
   a. choose menu
   b. give counts
   c. pay (on day of event or billed)
   d. request map/directions to facility and of internal layout
   e. document all agreements in writing and send copy to treasurer and president
5. Develop Event Committee if desired
6. Design Program
   a. arrange for speakers and/or workshop leaders
   b. determine equipment needed:
      c. for speakers - podium, PA system, chalkboard,
      d. head table
      e. tables for registration and displays
      f. flipcharts, overhead projector
      g. audio and video recording
      h. workshops
      i. set schedule of events
      j. make alternative arrangements in case of insufficient reservations
      k. set reservation deadline
      l. request certificate of insurance
      m. document all arrangements
7. Place on board meeting agenda for discussion and approval
8. Set menu
9. Set prices
   a. registration, including: refreshments, materials, workshop costs, facility, transportation for speakers, audio-visual insurance costs
   b. meal, including cost of free meals, taxes and gratuities
   c. if appropriate, add percentage for other overhead expenses
10. Prepare articles for bulletin or publicity purposes
11. Send letters to speakers and presenters including event schedule, registration form (if appropriate) and invitation to be guest for meal.
12. Establish deadline for submission of materials to be copied and included in registration packets or available for dissemination.
One Month Before the Event:
1. Develop plans with committee regarding individual duties including:
   a. registration table
   b. publications table
   c. guides
   d. photography
   e. record speakers/workshops
   f. collection of evaluation forms
   g. escort outside participants
   h. collect tickets
2. Compile registration packets
3. Contact facility to arrange equipment needs
4. Prepare publications display and materials

After Registration Deadline:
1. Call in a final count to facility
2. Discuss counts for workshops and make room assignments
3. Prepare signs with room numbers and directions
4. Prepare sign-up sheets, evaluation sheets, name tags

Day of Event:
1. Check facility
2. Supervise Committee
3. Put up signs
4. Supervise set-up of publications display and sales
5. Supervise registration of participants
6. Provide name tags, sign-up sheets, forms, money box, etc.
7. Have a "drop box" for evaluation forms
8. Double check arrangements for:
   a. recording speakers/workshops
   b. escorting outside speakers
   c. collecting tickets
9. Check with photographer
10. Bring check if necessary
11. Make final inspection of facility
12. Make attendance sheet for each workshop

Within One Week Following Event:
1. Send thank you notes to participants
2. Compile evaluation forms
3. Prepare report for next board meeting to include attendance, summary of comments, recommendations, financial statement

*** (Courtesy of LWV Connecticut)

Summary:
1. Present final report to board
2. Edit for board, bulletin and press release
ENDOWMENT FUNDS

The state League has adopted the Centennial Project, a bold new plan to raise $9.7 million through pledges and planned giving, to be committed but not received by the date of the League’s centennial anniversary. This fund will enable the state League to take over most of the secretarial and administrative functions from local Leagues, leaving them free to devote their energies to local study, voter service activities, and advocacy. Some local Leagues have also established their own endowment funds. Contact the state DOD for information about how to do this.

LWVNYS DEVELOPMENT/FUNDRAISING POLICY

Six basic principles will guide all development efforts by the LWVNYS.

1. Fundraising is essential to support the efforts of the League at all levels. Member dues are one component.
2. The financial well being of the state League and local Leagues* are inextricably entwined.
3. To the best of the LWVNYS's ability, it will not undertake any activity which undermines the financial resources of the local Leagues. Solicitation of known givers will focus on enhancing total giving to all levels.
4. The state League shall act as a resource and a vehicle for sharing ideas for local League fund-raising efforts.
5. Local Leagues will be apprised before corporations are approached in their areas for either general or restricted funds. These corporations will be asked to continue whatever support they currently make to the local League BEFORE contributing to the state League.
6. LWVNYS/LWVNYSEF fundraising may contain a revenue sharing option on such terms as may be adopted from time to time by the board of directors.

(Adopted by the LWVNYS Board 07/2007)

RESOURCES:

- Finance VP or Development Director (LWVNYS)
- 10 Immutable Laws of the (Fundraising) Universe http://www.lwv.org/AM/Template.cfm
- Creating a Culture of Fundraising in Your Organization http://www.lwv.org/AM/Template.cfm
COMMUNICATION/
PUBLICATIONS
PROMOTING THE LEAGUE

JOB DESCRIPTION: PUBLIC RELATIONS DIRECTOR

OBJECTIVES: To promote the League's image and activities in the community and to inform the public of League's services, positions, membership opportunities and fundraising efforts.

RESPONSIBILITIES:
1. Formulate a public relations plan and submit it to the board for approval.
2. Educate board members to be aware of public relations opportunities, stressing that every event is an opportunity for exposure.
3. Develop and maintain contact with media representatives. Maintain an up-to-date list of media contacts, as well as a list of organizations for networking.
4. Develop all media releases, with the approval of the president, and/or the appropriate chair, and direct the releases to all appropriate contacts.
5. Maintain copies of materials which could be used for release - i.e., newspaper clippings, flyers, and ads for your League use.
6. Explore all means of promoting the League—including letters to the editor, Op Ed pieces, photographs of events, exhibits, radio and TV spots.

************************************

Public relations is the art of using the media to inform and to influence . . . to communicate. Every League member is a public relations representative and everything a League does involve communications: election services, legislative action, membership, fundraising, program planning, and so on. The target audience ("public") may be internal or external or both. The key is to make sure that the message is focused, that it is heard and understood, and that it will have the maximum impact on the intended audience.

A communications strategy should be built into every activity on a League's agenda. Consequently, communications is a vital part of every League leader's job. All board and off-board leaders should keep the public relations director or the communications director up to date on plans and progress and confer with him/her about effective communication strategies.

By working together, leaders can multiply the League's opportunities to accomplish its goals and to enhance visibility.

Good public relations takes time, planning, goal-setting, decision making and follow-through. It involves knowing the media, analyzing the political forces in the community, taking the pulse of public opinion, assessing the League's resources and promoting the League's perspective on a story. A good public relations director needs to have a good sense of the range of activities that the League plans to undertake and the priority assigned to each one. She or he also needs to know who might make a good spokesperson on a particular issue, who has the background material, who has the contacts. The League's visibility in the community or state depends, to a large extent, on how successful it is in getting stories carried by the media. The League's visibility depends on how well the leaders communicate among themselves to focus and to deliver those stories to the media and consequently to the public.
PROCEDURE SUGGESTIONS FOR PUBLIC RELATIONS
PR is more than just press releases. Good PR should be an implicit goal of all spoken and written communication, of all spoken and written League material, publications, bulletins, speakers bureaus, letters to editors, etc.

ALL MEDIA RELEASES should be cleared with the president, and with any appropriate chair before being released. Copies of all media releases should be maintained by the PR director.

FORMAT of media releases should include:
- Media Contact/Address (TO)
- LWV Contact/Title (FROM)
- Date of Sending (DATE)
- Date of Releases (RELEASE DATE)
- Subject (SUBJECT - title of story)

Where appropriate and possible background and biographical information should be included with a media release. In this day of digital photography, it is important to remember that photos often speak much louder than words.

RESOURCES are numerous and should be tapped! These include each other, your staff members, former LWV members, former Board members, and friends. Your LL's dead files are a font of information as well. Also take advantage of League Basics (In League) (LWVUS), Impact On Issues (New York State & LWVUS), In League in New York State, and the President's Packet, and the publications catalog.

CAPWIZ is a resource on the state League website at www.lwvny.org that allows local Leagues to send press releases to a customize list of state and local media sources. Please contact the state League office for assistance in using this valuable resource.

STATE LEAGUE CONTACT should be encouraged as much as possible! The LWVNYS is ready, willing and able to offer assistance, and to receive suggestions.

PERSONAL CONTACT is an important facet of the PR chair's job. It is an important facet of every League leader's job. Contact with members of the media, League members, League friends, potential members, and government representatives should be encouraged.

MEDIA RELEASES - general press releases require you to clearly state: who, what, when, where, why, how, and perhaps why not. Be concise and straightforward.
- Letters to the Editor should be reviewed and/or generated by the PR chair, who should offer suggestions about placement, and format as well as content. Most LL releases, especially Letter to Editors, should be signed by the president. Again, the appropriate director or chair should review.
- Editorials are important when involved in advocacy; they are not written by a League person. Present the information to the appropriate contact (usually the editor); she or he will write the piece. It is important that both sides of the issue can be presented completely, and that the League's position is clear.
- OP-ED (opinion editorials) pieces are editorials that are written by a League person. They should clearly and concisely state the League position.
Calendar and Event Notices allow good exposure for a variety of events. Learn the contact and the required format and deliver the message to newspapers, radio, television, cable, and meeting places (posters).

Public Service Announcements (PSAs) can be 10, 20, 30, or 60 seconds long and are especially suitable for voter service messages.

Photographs should be included whenever possible. Be certain to list the subjects from left to right and check the spelling of names.

TV/Cable releases require good research and good preparation. Determine how best to tie your League project in with the station's activities.

EDITORIAL BOARD MEETINGS—An excellent way of educating a local paper about issues and League positions on them is to request an editorial board meeting. It is important to prepare in advance a position paper that states the League’s position and material in support of it. It is also helpful for the paper to raise arguments in opposition and to present materials that counteract those arguments. Remember, an editorial board meeting should not be viewed as an adversarial proceeding but as an opportunity to educate and enter into a dialogue with the local press. If you request a meeting, you must be prepared to answer the hard questions in an informed, logical, and sophisticated manner.

RADIO - TV APPEARANCES - The key here is to clear, concise, conversational and correct. Remember: plug for membership, plug for funds!

PRESS CONFERENCES require good planning and present great opportunities to get your story exposed. The main components include: a comfortable site, a convenient time, written statements, press kits, sign-in sheets, opening remarks, and arrangements for interviews and follow-up action.

PRESS KITS may include as much of the following as appropriate and available: cover memo or release; background and history on the issue; fact sheet on the issue; quotes and comments by experts; selected press clippings; state-by-state or city-by-city analysis; speeches or statements on the issue; charts, visuals or photographs; biography on spokesperson; League information - including history, services, how to join and how to support. Much of the background information can and should be presented with citations to on-line materials.

FEEDBACK should be given by the PR chair to directors and to the LWVNYS. This includes clippings and comments.

ADVERTISING should be purchased when the exposure warrants the expense. A good public relations policy also considers advertising as a pay-back and an expression of appreciation for the free coverage given.

TELEPHONE CALLS - Consider putting a League phone number in the information section of your local phone book. It is important that the public know where to reach your League. Make sure that all League publications list a phone number for your League. Usually, the president's home phone is listed, but the voter service director's phone may also need to be listed. Calls of a public relations nature should be referred directly to the PR chair or appropriate spokesperson either by giving her or his telephone number to the caller, or by offering to ensure the call that the appropriate person will respond in a timely manner (ASAP). COALITIONS - CO-SPONSORSHIP should be viewed as opportunities for good public relations. Please refer to guidelines in In League, this publication under "Program: Study and Action."
COMMUNITY EVENTS - Heritage and special days, fairs and parades should have League presence. Participation provides opportunity to distribute information, register voters and solicit membership and support.

EXTRA OPPORTUNITIES - Public relations opportunities abound in a variety of ways. Consider: League products; League services (speaker’s bureaus; moderating candidates nights); direct mail, brochures, reports; tours of facilities; exhibits and displays; anniversary celebrations; community bulletin boards (using posters and computers); charitable contributions.

HOW TO EDIT A LEAGUE BULLETIN

JOB DESCRIPTION: BULLETIN EDITOR

OBJECTIVES: To produce and distribute a newsletter which provides current, pertinent and stimulating information on League issues and activities.

RESPONSIBILITIES:
1. Propose to the board at the beginning of the year a mission statement for your bulletin, as well as plans for size, frequency, editorial policy, general contact and layout. Get cost estimates for printing and mailing, and arrange for a bulk mail permit, if needed.
2. Develop for each issue a proposed list of articles for approval by your board which reflects clearly and accurately the programs, activities and accomplishments of your League.
3. Write guidelines and set copy and mailing deadlines.
4. Discuss specific content of the next issue at each board meeting. Assign articles, with suggestions for contents, to board members or others. Write additional articles if needed.
5. Edit all copy and submit it to the president for approval.
6. Oversee typing, layout, proofreading, reproduction, collating, addressing and mailing.
7. Participate in the exchange of bulletin in other Leagues via posting on the local Leagues Bulletins section of the state League website. Please contact the office to participate in this process.
8. Make bulletin available for on-line publication at state and local levels.

Bulletin are the primary means Leagues use to communicate with their members. They keep members up to date with League activities, inform members on issues, stimulate member involvement and participation, and are a valuable historical record of League accomplishments.

League bulletins are an important public relations tool when distributed to newspapers, radio/TV stations, public officials, other organizations, major contributors and prospective members.

POLICY
Writing a mission statement helps the editor focus on the purpose and message of the bulletin. Doing so will help clarify your goals and will help produce a policy that can be taken to the board for its approval.

The mission statement should include:
1. The audience you wish to reach, including both the internal public (members) and the external public (others to whom the bulletin is mailed);
2. Items or features which you wish to have in each bulletin (such as the president's message, calendar, etc.);
3. Your goals for the publications (what you want the readers to know and do as a result of reading the bulletin);
4. How you plan to achieve these goals.

Remember the local bulletins are mailed to and are read by members of the community and are thus a good PR tool. With this in mind, bulletins should reflect the many and varied activities of the local League in clear language, avoiding League "jargon" unless it is explained.

CONTENT
- Membership application
- League meeting announcements with dates, times, places, topics, speakers, etc.
- Calendar of Leagues events; include meetings of city/town/village council, school board and other organizations' meetings of interest to members.
- Program/study material from program item directors and from state and national board reports.
- Fact sheets, bibliographies, questions, outlines for pre-meeting reading.
- Voter service information and reports; when and where volunteers are needed.
- Message from the president, who may determine its frequency.
- Updates on League action items at all levels, including Calls to Action and anticipated future Calls to Action.
- Records of League activities, with acknowledgments and recognitions, and follow-up where appropriate.
- Proposed local program, by-law changes, slate of nominees, proposed budget (one month before the annual meeting).
- Cartoons, anecdotes, notable quotes - to pique reader interest.
- Profiles of League members, board members, new members; statistical profiles.
- Reviews of League publications, books/articles of League interest and how to obtain them. (Remember that copyrighted publications, other than League materials, may not be reproduced.)

STYLE
Use simple, direct and lively language to convey accurate, complete and nonpartisan information. Provide a variety of opportunities for members to respond.

Recheck each article by standard journalistic criteria: WHO, WHAT, WHEN, WHERE, WHY and HOW.

LAYOUT
Simple, attractive nameplate and address
- immediately identifies source and date
- Use League logo. Specifics of logo usage can be obtained at www.lwv.org under the member/presidents section through a publication entitled, “League Logo and Usage Guidelines.”

First page, index, and all headlines grab attention
Regular features are easy to find-including membership form
Reproduction is clean and readable-type suitable for readers (font size and style)
Include [photos with quality reproduction
Design and presentation invites reader to keep turning the pages

**SCHEDULE**
Establish a publication schedule with the board (e.g., plan to mail bulletins one week after the board meeting and set an earlier deadline for copy).

Deadlines must leave ample and realistic time for editing and approving copy, typing, layout, duplicating, collating, stapling, addressing and mailing.

**ADVERTISING**
The latest postal regulations for Nonprofit Standard Mail rates can be obtained by ordering (through your local post office) or downloading Publication 417 from [www.usps.com](http://www.usps.com). If you are downloading from the website, you must have Adobe Acrobat Reader to view the publication. You can obtain Acrobat Reader as a free download from [www.adobe.com](http://www.adobe.com). At the USPS site, look for the search engine and type in “nonprofit standard mail” then go to “Nonprofit Standard Mail Eligibility Quick Service Guide.” Additional and more detailed information may be obtained within Publication 417.

The newest regulations are dated March 2008. This publication is comprehensive and provides links for more detailed information on each topic.

In order to be judged a periodical, your bulletin must contain:

1. A title
2. Be formed of printed sheets (no sheets produced by stencil, mimeograph or hectograph processes)
3. An identification statement within the first five pages of the publication which includes:
   a. the title;
   b. the issue date, if this is not included on the front cover or cover page;
   c. statement of frequency showing when issue are to be published (daily; weekly; monthly;
   d. monthly except June; four times a year in June, August, September, and December; annually, irregularly, etc.)
   e. the name and address of the organization, including the street name and number, zip plus four digits or five-digit zip code;
   f. the issue number, if not included on the front cover or cover page;
   g. international standard serial number if applicable.
   h. subscription price, if applicable
4. AT LEAST 25 PERCENT NON-ADVERTISING MATTER IN EACH ISSUE

Product and advertising content restrictions are MORE SPECIFIC than these general requirements for a periodical, and are fully explained both in this publication and in Publication 417. You will also find regulations on how to credit sponsors and donors.

Ads accepted for state League publications should indicate support for the League and should not solicit or suggest support for a candidate or political party. If advertising is received from a candidate or political party, a statement should appear on the same page stating that the League does not support or oppose political parties or candidates. Such ads should not appear in the two-month period prior to election.
MAILING
Keep your League’s mailing list up to date. Include prospective as well as current members. Send one hard copy to:

- the state League office at 62 Grand Street, Albany, NY 12207
- the state League President: see board list
- the state League Membership Vice President: see board list
- Membership Outreach Coordinator: see board list

Additionally an electronic copy should be forwarded to:

- Your liaison
- LWVUS: (MDuncan@lwv.org)
- Manager of the local League bulletin section of the state League website: adam.gaus@IEEE.org

Use bulk mail to add contributors, elected officials, libraries and schools to your bulletin mailing list.

Costs: Annual permit fee, higher paper expenses, more preparation time for mailing.

Benefits: Lower per-piece mailing rate; your bulletin becomes a public relations instrument, your League's name and actions reach a wider audience with minimum cost and effort.

PUTTING PUBLICATIONS TO WORK

Coordination, production, promotion and distribution of League publications are a responsibility of each portfolio.

BOARD MEMBER RESPONSIBILITIES:
1. Be familiar with publications produced by the state and national Leagues in your area of responsibility.
2. Be sure that you have copies of the publications related to you portfolio including those from your local League as well as state and national League publications.
3. Be aware of the status and timeliness of all current local League publications related to your portfolio. Initiate reprinting of revisions as needed including the development and implementation of a marketing plan for the publication.
4. Market League publications should include members, schools, libraries, businesses and the public. Promote League publications to members through bulletin articles and displays at meetings.
5. Keep accurate records of money spent and collected. Observe tax requirements.

*************************************

League publications, including both printed and audio-visual materials are indispensable tools for informing members and the community about important issues, for encouraging citizen involvement in the political process and for persuading citizens and government officials to support League positions. Published materials can also be an excellent source of income.

Optimal use of publications - local, county, state or national - is a responsibility of every board member. The publications director has the important job of facilitating and coordinating the board's plans for the use of the publications in every League effort and activity.
SPECIAL WAYS TO REACH MEMBERS WHO COME TO MEETINGS

- **Plan ahead** so that materials are available before the meeting.
- Identify which materials to include.
- Be sure that the materials are available or order or print enough copies well in advance. Charge them to the proper budget lines.
- Use the bulletin to promote sales in advance of the meeting.
- Use other League meetings to promote sales - e.g., publications relating to April meetings should be available at all February and March meetings.

AT THE MEETINGS

- Display League wares imaginatively. A kit made of two boards hinged together, a suitcase, pegboard, cork board - all have been used successfully as attractive display space. It should be lightweight and easily portable. Provide room for copies to be sold on the spot. - Give a two or three minute review of recent publications. (Be sure to ask in advance for time!) A little enthusiasm can sell a lot of copies.
- Have change! Nothing is more frustrating than losing a sale because the customer has a $20 bill.

REACHING THE PUBLIC

Arrange a display in the library, a school or a bank, or at any important public meeting or community event.

- **Schools, colleges and libraries are good customers** - e.g., approach chairs of high school social studies departments in the spring with a packet of materials. Every League should have a Publications Kit.
- **Other organizations should be informed** of timely publications. Be sure that League members who are speaking to other organizations have some League publications and catalogs with them.
- **Additional markets** for distribution and sale include book stores, Chambers of Commerce, Welcome Wagon, town, village, and city halls, real estate agencies.
- **New releases and spot announcements** on cable and radio stations are excellent ways to reach out to the public, as are blurbs in local newspapers. (Be sure to include name and address for easy contact.)

MAKING MONEY SELLING PUBLICATIONS

Both the national and state Leagues discount bulk orders of publications to local Leagues so that they can be sold for a profit. See the publications catalogs for information. Whenever a new publication is published, information will be sent with it explaining the pricing policy. Be alert for special offers which will allow your League to make money.

USING TAX-DEDUCTIBLE MONEY TO PURCHASE CITIZEN EDUCATION PUBLICATIONS

The LWVNYS Education Foundation is affiliated with the state League and may receive tax deductible contributions solicited by local Leagues as a part of a finance drive or as a specific project. Money deposited with LWVNYSEF may be used to purchase citizen education publications. For example, you might consider asking a local business to provide funds to distribute a particular publication to all schools in your district. Further information is included in the "Raising and Managing Money" section of this publication.

REACHING FINANCE CONTRIBUTORS CAN REALLY PAY OFF

Servicing present contributors and wooing future ones with publications has proven most helpful in many League finance drives. Whether publications should be given or sold to contributors and prospects is worth serious consideration by your board. Some leagues offer a subscription service to those who have made a substantial contribution to the finance drive.
PRODUCTION OF LOCAL PUBLICATIONS
- **Copyright** local publications so they cannot be reprinted by someone else without permission. Contact the Registrar of Copyrights, Library of Congress, Washington DC 20559, for information.
- **Always include membership information** in local publications.
- **Share copies** of substantive publications with the state and national Leagues as follows: send one copy each to your liaison and to the state office; and send three copies to the national office.

PUBLICATIONS CATALOGS
The national League produces two publications catalogs - one for the public and one for League leaders. Both are available free upon request. The state League also produces publications information on its website.

**CRITERIA FOR EVALUATING PROPOSED PUBLICATIONS**

**External Publications**
1. Does it reflect long-range organizational goals and priorities? How?
2. Will it help position the League as a leader on this issue? As an authority or a resource? Does it enhance the League's image in any other way?
3. Does it have PR value? Will it be timely and/or newsworthy when it is published?
4. Will it help attract/retain members?
5. Will it provide revenue for the League? Can it pay for itself? (Consider costs of "donated" time, production, materials.)

**Internal Publications**
1. Does it reflect long-range organizational goals and priorities? How?
2. Does it provide essential assistance? How?
3. Does it communicate important League information?
4. Will it stimulate and help retain members? How?
SAMPLE PUBLICATION PROPOSAL

This is an example of the proposal which should be completed by the person proposing the publication. Using an instrument of this kind will help focus on important questions (and answers) which the publications director should be prepared to answer regarding each new publication.

Working Title

Name of person submitting this proposal: ___________________ Date: ______

1. Describe the purpose of this publication. What needs does it fill?

2. Describe the content and focus.

3. Who is the target audience?

4. What size to you recommend (dimension, # of pages, # of copies)?

5. Why should this publication be done be the League?

   Are similar pubs available from other sources?

   Are there other ways to meet the needs stated in question #1?

6. How will this pub be funded?

7. Who will do the research? Edit?

   Design? Type?

8. What is the target date for publication? Delineate estimated timeline.

9. When was this publication last printed?

10. How many copies did we print? How many were sold?

    How many were distributed free of charge?

11. Who is the target market? Members?

    Non-Members? Both?

    What is the sales potential within this market?

12. Is this publication basically educational (Foundation) or League (program positions and action)?
PUBLICATIONS – GUIDELINES FOR STATEWIDE DISTRIBUTION OR SCOPE

PURPOSE: League publications are viewed as authoritative by government, business and the public. For this reason, the following guidelines were developed to enhance communications between local Leagues and the state League program committee concerning local publications which will have statewide distribution or scope. The purpose of these guidelines is to increase communication and provide assistance wherever appropriate. Note that these guidelines are not applicable to voters service publications.

GUIDELINES: If a local League is planning a publication that falls within these parameters, the state league requests that these procedures be followed:

1. When a local League decides to produce a publication as defined above, the chair of the project should do the following:
   a. Notify the state League president and publications director. Identify whether the publication is educational (balanced presentation of the issues) or advocacy (supported by a League position).
   b. Provide the state League with copies (as they are developed) of an outline of issues to be included in the publication and an estimated timeline to completion.

2. The state League president will designate a state board director(s) to review drafts and final copy of the text (this would occur after the information gathering phase is completed). The director(s) may recommend deletions, additions or other changes to the text. (Potential liability should be addressed at this stage by the local League and the LWVNY and resolved in the text).

3. If the publication discussed a technical or controversial issue on which the League has no position or has not conducted a study the state board may recommend that:
   a. Expert readers be consulted to review the text;
   b. A disclaimer be prominently printed in the publication;
   c. Standard referencing practices be used for technical publications (i.e., footnotes, annotated bibliography, etc.);
   d. Questions of fact or liability arising after the publication is printed or distributed be resolved by mutual agreement between the local League and state board;
   e. Significant corrections to the text after final printing be made in the form of an errata sheet and distributed to all identifiable groups or individuals that received the publication.
PROGRAM:
STUDY AND ACTION
DIRECTING A LEAGUE STUDY

JOB DESCRIPTION: LOCAL PROGRAM STUDY DIRECTOR

OBJECTIVES: To direct study on a local League program. (Program directors dealing with state and national issues see page 5).

RESPONSIBILITIES:
1. Form a resource committee.
2. Make a plan for the study to present to the board for approval.
3. Direct balanced committee research, pulling the information together and planning its use.
4. Inform members through bulletin articles, website, list serves and meetings.
5. Plan and conduct membership meetings to determine consensus.
6. Be aware of public relations opportunities and advise and assist public relations director as needed.

WHAT IS LOCAL PROGRAM?
Adopted at the local League annual meeting, local program consists of those board issues the membership support for action based on local positions and as well as new studies adopted.

Responsibility for choosing and adopting a local study, for conducting studies of local issues, for reaching positions on local issues (consensus) and for taking action to influence public policy in furtherance of those positions lies with the local League and its board.

Program and action gives the League visibility. It attracts new members. It increases respect and support for the League. An active local program is the single most important characteristic of a strong local League.

CHOOSING LOCAL STUDIES
The board recommends new studies but the decision is the members'. The higher the participation of the members in the process, the more "grassroots" involvement there is in all stages of program, from adoption to study to action.

A program planning meeting held 3-4 months before your annual meeting is the opportunity for members to push their program interests. (State or national program planning, as appropriate, can be considered in the same meeting.)

Where do study ideas come from?
- interests of individual members
- program committees
- board members
- previous studies
- community
- other Leagues
observers at local government meetings

If you haven't had a new local study item for a while, consider holding a "focus group" to brainstorm with some community leaders, or meet with ordinary citizens to learn what's most on their mind.

Using this input, the board recommends a new study to the members through the bulletin in time to meet the bylaws requirements for notice. (Some Leagues year after year propose challenging new studies, or a restudy of a support position that is based on dated information, in order to attract new members.)

In proposing a new study, the board needs to consider:

- Is government action needed?
- Does the issue fall within League principles?
- Is it a problem local government can solve?
- Is the timing right?
- Is there enough member interest?
- Is effective citizen action foreseeable?

The wording of the issue should be general enough to allow some flexibility but to indicate as clearly as possible the issues’ content and the scope of the work to be undertaken. It is often helpful to use the following format in presenting the proposed new study to the members:

**Study of ______________________________**

Justification:

The problem; the current situation (law) (regulation); the change contemplated; who could effect change (the local government, agency, etc.)

**Outlook for work:**

What you are going to do and when.

At the annual meeting the members consider the proposed study. (In the mailing of the proposed program, including any new studies, many local League boards include information on non-recommended studies which can also be considered by the members provided bylaw provisions are followed.) At the meeting the wording of an item may be amended but the intent or scope of the study may not be changed.

Current local program issues the League wishes to retain must also be adopted at the annual meeting. It is recommended that Leagues include in their by-laws a provision to enable the adoption of emergency programs in addition to those approved at their annual meeting.

**THE STUDY**

Based on the study proposal and the discussion at annual meeting, the resource/program committee and the board agree on the outlook for work and a timetable for completing the study, on keeping the membership informed through bulletin, website, list serves, articles on membership meetings, the consensus process and deadline. The board appoints a chair to direct the study. The chair should preferably be a board member. (Otherwise communication puts too great a burden on the president.)
One of the reasons for the political effectiveness of the League is its reputation for thorough study. The committee must decide what, where and how to gather information. All sides of any issue should be explored. **Lack of bias is essential. The study material must include all sides of the issue both pro and con.**

Opportunities may surface to work with other groups. (See "Guidelines for Working with Coalitions" in this section.) Networking with other Leagues doing similar studies may be possible.

Keep the board informed. Ask the board for help and direction when you need it. Keep membership informed through articles in the bulletin and informative meetings.

**PRESENTATION TO MEMBERS**

As pointed out in *League Basics (In League)* (LWVUS), while the resource committee members will "often become expert on issues, they should remember that materials prepared for League members should focus on the information they need to make decision as informed citizens, not as experts or specialists in the field. Sometimes a bibliography, accompanied by a fact sheet with provocative questions, may be all that's needed."

Public meetings with a speaker and a workshop for in depth examination of an aspect of a topic may be held during the course of the study. But, depending on the size of the League, general membership meetings or discussion units are most suitable for achieving or reaching consensus.

Members need information in order to arrive at a position. It is up to the board to decide the approach and to approve the consensus questions. The questions should be carefully planned so that they will elicit responses that will serve as a basis for action and provide clear policy guidance from the membership without unduly restricting practical future action. Consensus questions should be distributed to the members in advance.

**CONSENSUS**

A discussion outline should be prepared. Some Leagues run unit meetings staffed by a coordinator, discussion leader and a recorder. In those Leagues the discussion leader would meet ahead of time with the resource committee to be briefed on the issue and to understand the meeting plan. Other Leagues have meetings, unit or general, conducted by the resource/program committee.

The members need to understand the process and the purpose of the meetings(s). Agreements reached during the meeting should be made clear. The board may decide to supplement the meeting(s) with a bulletin tear-off, telephone calls or other means to obtain greater participation.

After the meeting the committee should analyze member opinion and prepare a consensus statement for presentation to the board. The board determines whether consensus exists and approves the consensus statement. (See "Consensus" and "Concurrence" in this section.)

**STATE AND NATIONAL PROGRAM/LOCAL PROGRAM**

Study and action under state and national program are handled by a local League under the direction of the state and national Leagues.

Local Leagues may also undertake a local study under a state or national position. It would be handled in the same manner as a local study with two important differences:
1. There is no need for a formal program proposal and adoption at the annual meeting. However, discussion and agreement to undertake the study is appropriate at a general or annual meeting because the decision will require a major effort and membership involvement to do the study and to take action based on the results.

2. When considering a local study on a state or national position, look carefully at the appropriate *Impact on Issues* (issued every two years by the state and national Leagues) for background on existing items. A local program position may not conflict with a state or national program position, and must fall within its parameters.

Within these limitations, the study should proceed along the same lines as any local study. Assistance in planning and carrying out the study is available from both state and national directors.

**RESOURCES**

  http://www.lwv.org/AM/Template.cfm


- *Successful Meetings*
  http://www.lwv.org/AM/Template.cfm?Section=Presidents&CONTENTID=9775&TEMPLATE=/CM/ContentDisplay.cfm
CONSENSUS

Consensus, or membership understanding and agreement, is the basis of the grassroots character and effectiveness of the League of Women Voters. The League is a study and action organization. Therefore it is important to have a clear expression of member views to determine what action to take. Consensus-taking is a complex procedure at the local, regional, state and national levels; it is puzzling to new members and challenging to experienced leaders.

WHAT IS CONSENSUS?
As noted in League Basics (In League), "The American Heritage Dictionary defines consensus as 'collective opinion or concord; general agreement or accord.' In the League 'consensus' is used (1) interchangeably with 'member agreement' to refer to the overall decision making process... by which a League board determines that there is substantial agreement among members on an issue, and (2) to refer to a specific technique used traditionally in the League to discuss and arrive at conclusions on issues..."

"Consensus/group discussion is the technique most often used in the League for reaching member agreement. It is a process whereby members participate in a group discussion of an issue. The 'consensus' reached by members through group discussion is not a simple majority, nor is it unanimity; rather it is the overall 'sense of the group' as expressed through the exchange of ideas and opinions."

PREPARATION FOR THE MEETING
Extensive member participation at consensus meetings must be an overriding goal. It is also important that members be as well informed as possible. General information meetings during the course of the study, fact sheets and bulletin articles can interest members in the subject and increase their understanding of the issues involved.

The resource committee is responsible for preparing or adapting the discussion outline for the meeting. This outline will determine whether the meeting is interesting to those in attendance and whether consensus is, in fact, reached. In its preparation the resource committee should be guided by the advice of a discussion or unit leader who can view the outline from the members' point of view. The carefully planned agenda will have two unequal parts - a brief presentation of background material by the resource committee followed by the consensus discussion. An important objective is to limit the resource material that will be presented to what the group needs to know for informed decision-making. The bulk of the time must be reserved for discussion because it is the members who reach consensus, not the resource committee. Suggested time slots for all parts of the meeting are a valuable tool for the discussion leader.

Consensus questions and discussion questions are not identical nor do they serve the same purpose. Consensus questions are intended to identify specific areas of agreement among members as a basis for action; discussion questions provide the background which helps clarify member thinking on the subject. They may bring out philosophical differences or raise new implications. Discussion questions permit various points of view to be aired. The discussion outline for the consensus meeting should include both types of questions in order to develop and guide the discussion toward the intended goal: consensus.

THE DISCUSSION LEADER
The most important prerequisite for a successful consensus meeting is a good discussion leader. Leaders must be trained to encourage all members to speak. They must welcome all points of view—even unpopular ones.
They must be adept at making sure all the facts are presented and all pro and con arguments covered. They must make sure all sides of the issue are examined. Familiarity with the subject under discussion is a necessity in order to recognize the requirements for balance and the essential points to be covered. Leaders do not have to be members of the resource committee; a certain detachment can aid in carrying out the discussion-leading role but attendance at some resource committee meetings or special briefings is advisable so that the leaders can gain a basic understanding of the subject.

A discussion leader must pace the meeting so that all questions can be covered. Often, too much time is spent on the first question leaving inadequate time for the rest. Knowing how to move the group along without cutting off discussion is important. The leader should be attuned to repetition and recognize when arguments and opinions begin to be repetitive and nothing new is being said.

As areas of agreement become apparent, the discussion leader should announce them so that the group can agree or disagree with the interpretation. When a specific consensus question is answered, the leader should say, "We agree that . . . ." In this way, members have a feeling of participation in the decision-making.

THE RECORDER
Having a recorder at a consensus meeting is imperative. The recorder should also be familiar with the consensus process in advance. Discussion leaders should be free to concentrate on their job without having to take notes or trust their memories. They call upon the recorders to summarize the discussion and agreements periodically for purposes of clarification. Recorders should limit their note-taking to the consensus questions or other areas of agreement that emerge.

THE RESOURCE COMMITTEE
The role of the resource committee at the consensus meeting is probably the most challenging. Its basic function is to supply the facts, when asked, without taking over the discussion or forcing its opinions on others. Varying, and even opposite, opinions based on the same facts are possible and valid. Opinions based on fallacies, however, should be corrected. The resource committee should not only give needed information but bring in pro and con arguments not covered and make sure all viewpoints are expressed.

THE ABSENT MEMBER
Can consensus be valid and representative when only, say, a quarter or even only a tenth of the membership participates? Yes - when two conditions are met:

1. If all members are given the opportunity to participate, and
2. If the subject is discussed from all points of view with all pros and cons fully presented. The quality of the discussion is as important as the quantity.

Adequate notice should be given of an upcoming meeting and its purpose. An effort should be made to see that consensus meetings are held at convenient times and places. Leagues should consider encouraging members to communicate their opinions in advance when they cannot attend the meetings.

WHAT ABOUT POLLING?
Polling has serious drawbacks as a tool for reaching member agreement. Consensus includes a careful examination and discussion of all facts and opinions. It is a meeting of minds after considering all shades of opinion. A poll is a consensus based on individual opinion rather than group discussion. It deprives the members of the opportunity of interacting with others in the process of shaping their views. It has the further
disadvantage of fixing previously-held ideas and polarizing positions. This eliminates an important part of the program process and undercuts one of the strengths of the League - educating and informing its members.

REACHING CONSENSUS
Does the League ever take a vote at a consensus meeting? Preferably not, because consensus is not based upon a simple majority. Most of the time the sense of the meeting can be determined from the discussion, but this becomes difficult, if everyone does not participate. It becomes almost impossible if many are silent. The discussion leader may say "Are there others who feel this way?" or "Am I correct in saying that we agree that ..." This will usually produce a response. If there is uncertainty, a show of hands may clarify whether there is substantial minority opinion, and thus consensus is lacking.

CAN IT BE DONE AT ONE MEETING?
Yes, but before solutions can be agreed upon, a full understanding and discussion of the problems must be undertaken. As much background information as possible should be provided. Some subjects require more information than others and, therefore, require more time.

Consensus is never really reached at a single meeting; it is merely formalized there. Members at a consensus meeting bring with them a knowledge of government, their own basic philosophy, knowledge of past League studies on related subjects, and a backlog of information gathered from newspapers, TV and other mass media.

THE BOARD
Determining whether there is consensus is the responsibility of the local board. The board should be presented with recommendations for a consensus report by the resource committee and/or unit and discussion leaders. It should also receive a full report of the meeting(s) in order to evaluate the recommended report. What were the answers to the consensus questions? Was there enthusiasm for these answers or opposition, doubt or hesitancy to come to a conclusion? What other areas of agreement were reached? The minority as well as the majority view must be considered. The board also considers the number of members participating and the effectiveness of the discussion.

There may be a problem when consensus is taken at several unit meetings within one League. How does the board reconcile the reports if they differ? To do this it considers membership as a whole, not the individual units. Substantial agreement must be found among the members. This may be arrived at by adding the minority opinion in some units to the majority in others. If there is still a question, the board may decide to call a general meeting to determine if there are areas of agreement. A fuller discussion of all the pros and cons and all divergent viewpoints may result in a broader understanding of the problem and a clearer agreement on solutions.

WHEN A CONSENSUS CONCERNS A REGIONAL, STATE OR NATIONAL MATTER
When participating in a regional, state or national League consensus, it is important that the local League communicate as much as possible about the local conclusion to the appropriate board. This includes not only describing the consensus but evaluating its strength and the degree to which it represents the membership.

Sometimes a consensus question may be answered with one word, but often additional comments are needed to clarify the position. The accuracy of the final consensus depends upon good reporting on the part of the local League. Responses should be concise and direct, but there should also be enough elaboration to guide the reader in determining precisely what views are being expressed.
It is also important to include conclusions which may have come up as a by-product of the discussion, not necessarily as a direct response to a question. If several Leagues arrive at the same spontaneous reaction, it is a strong indication of its significance to members and merits inclusion in a final position.

In the rush to meet a deadline take the time to remember that the information being provided forms the basis of League position and can make a real difference in its formulation.

Finally, it is important that Leagues refrain from announcing their local consensus results (in bulletins or press releases) since their conclusions will become an integral part of a carefully worded statement based on the reports of all participating Leagues. It is that statement which then becomes newsworthy. Also premature announcement of the local League's consensus results may confuse both the public and local members if the final statewide or national consensus differs from that of the local League.

**CONCURRENCE**

Concurrence, the act of agreeing with a statement of position, is one method of determining membership understanding and agreement as a basis for League action.

The use of concurrence on any issue is decided by the appropriate League board on the basis of the nature of the subject, the time available for decision-making and the resources or interest present in the League for research. The board sets guidelines for the process, particularly those relating to who will be asked to concur, with whom and how. For example, the board of a local League might ask its members to concur with a position statement arrived at by the League's resource committee or by the board itself. The request for concurrence could be presented at a meeting or by telephone or by written questionnaire.

Concurrence can involve the local League in a limited study to evaluate a statement of position or it can depend on generally available community knowledge to stand behind a decision. Local Leagues receive factual background information which describes both sides of the issue, a statement of position, and an outline of the reasoning that led to that position. Leagues could evaluate the analysis and concur or not concur with the position as stated. Local League boards could decide how to involve their general memberships in the process. In advance of receiving responses, the board sets concurrence guidelines.

Another concurrence process is one in which easily understandable general statements are offered to Leagues for their evaluation. Source material can be chiefly information available from the general media and from everyday life, as well as League Publications. Again, each League can decide on how to measure concurrence.

**Considerations that could lead to the use of concurrence**

The issue in question has been well-studied by many Leagues and position are similar.

The issue is easily understood by the membership and new research would be redundant.

The issue is closely related to other League items, and positions could be transferred or broadened if membership understanding and agreement exist.

The issue is vital to one group of Leagues but peripheral to others.
Whether concurrence or the more structured consensus process is used to seek a League position, the same questions must be answered in the end, "Is there member understanding? "Is there member agreement?"

**STATE CONSENSUS/CONCURRENCE GUIDELINES & POLICIES**

**General Principles**
It is the responsibility of the local League board to determine whether or not the local League has reached consensus/concurrence and what that consensus/concurrence is.

The percentage of participating local Leagues, as well as the number of members represented by those Leagues determines the degree of agreement necessary to achieve a valid consensus or concurrence. Also, a valid consensus/concurrence should represent a fair geographic distribution.

Criteria for declaring a valid consensus/concurrence:
1. At least one-third of the local Leagues in NYS participate.
2. The participating Leagues represent three out of four designated geographic areas: Region I, Region II, Region III and Region IV.
3. Within each geographic area, at least 20% of that area's local Leagues.

Degree of agreement required:
1. A valid consensus/concurrence is dependent on agreement of 2/3 of the local Leagues participating.
2. Any question or part thereof which does not clearly reach this level of agreement is considered a "no consensus/concurrence" area for further League action.

**CONSENSUS/CONCURRENCE POLICIES**

If two or more Leagues meet together for consensus or concurrence, each local board must submit its own consensus/concurrence to the state or national office. Resource committee members participate only in the consensus/concurrence of their own local League. Non League members may not participate in a consensus/concurrence discussion. Individual MALs and individual members of MAL units may participate in any one local League's consensus/concurrence. On the reporting form, notation should be made of how many MALs participated. MALs will be sent study material and consensus/concurrence forms only on request. They shall be counted as a single unit if the lower of 10% or 5 individual MALs respond. The form will contain a line to identify MAL respondents.

*(Revised by LWVNYS board 3/2008)*
TIPS FOR DISCUSSION LEADERS

1. **Help create the right atmosphere**
   a. Be relaxed and friendly, pleasant and informal. Be tactful!!! Show your interest by listening impartially to every opinion expressed. Be sure the group understands they are to exchange ideas freely, that every opinion is solicited and welcomed.
   b. Make sure everyone is comfortable, sitting in a circle or semi-circle and has been introduced. Use name tags when necessary.
   c. See that the leaders (discussion, resource, recorder) are part of the group, not apart. Make sure they can be seen and heard by everyone and vice versa.

2. **Have a plan to get discussion started**
   a. Before beginning, repeating if necessary, make sure everyone is aware of the focus and scope of the discussion. Clearly define the issues to be discussed and underline by indicating related areas that will not be taken up.
   b. Start discussion off with a provocative, carefully prepared kickoff question which calls for opinions, not facts, and stems directly from the introduction and leads to the first area to be discussed. Beware of questions that can be answered with a simple "yes" or "no".
   c. Do not be afraid to wait a short time to allow the group to mobilize its thoughts. If there is no response after a reasonable length of time, rephrase the question, but do not use a different question. Do not call on people directly unless you are quite sure they have background on the question and would be willing to speak.

3. **Keep the discussion moving**
   a. Using the questions carefully prepared in the discussion outline, help the group to move from point to point. Remember to ask, not answer the questions. Refrain from injecting your own point of view into the discussion. Be prepared to bring out a point of view that is not represented.
   b. Be sensitive to the group. Know your outline, but be flexible and don't insist on sticking slavishly to any plan. Try to see that all points in the outline are covered at some time. If the group disagrees, point it out. Usually this is all that is needed to bring the group back to the subject.
   c. If the members start repeating themselves, stop and recap in order to focus the discussion and crystallize thinking. This will help the group to move on.
   d. When agreement is reached in any area, or the reasons for conflicting opinions emerge, stop to summarize. This will give the group a feeling of accomplishment.
   e. If the group gets hopelessly bogged down on any point, ask resource leader to provide additional information which may help to clarify the issue, or help the group to distinguish facts from feelings. If points of view cannot be reconciled, summarize both and move on.
   f. Remember, the secret of keeping discussion moving is to recognize when the group is ready to move on. Lingering too long will strangle discussion with boredom; moving ahead too fast will strangle discussion with frustration.

4. **Be alert to problem situations**
   a. Over participants. See that no one holds the floor too long or too often. Refuse to be awed by the "dominant" person, the "expert." Call for another opinion from the group or resource leader. Help the "repeaters" by summarizing quickly the point they are making to the group. They repeat to make sure their views have come across and this will reassure them. Help the insecure "ramblers" to feel they have a place in the group. Sometimes a small assignment will help. Ask
the "tangent" persons to relate their off-the-point comments to the discussion or throw out a question quickly to bring discussion back on the track. If the "story tellers" go on long or off the subject, warmly suggest that the yarn be saved for after the meeting.

b. Shy ones. Try to draw them out with a simple question when they indicate they are ready to contribute something--they will probably not speak up unless called on. On the other hand, remember that it is not mandatory for each person to verbalize at every meeting. If shy people feel more comfortable remaining silent, leave them alone. A simple "I can see by Jane's nod that she agrees with us" will recognize her non-verbal participation.

c. Side conversations. Can be handled by asking those conversing aside to share their thoughts with the group. If there is a general restlessness, the group may either be bored, in which case you need to help the group move on, or frustrated, and need more information or clarification.

d. Missing facts. If the group members do not have the answer to a question (including resource leader), don't let them worry about it. Assign someone to bring it back to the next meeting.

5. **End the meeting ON TIME!**
   a. Ask recorder to give a brief summary.
   b. Make sure the group agrees with the summary. Ask for a show of hands to ratify conclusions if there is any doubt.

6. **Help prepare the written report**
   a. Together with the resource leader, units chair, and recorder, take a few minutes at the close of the meeting to expand on the results of the meeting; assess extent of participation; whether the group was stimulated and interested or bored; whether people felt competent and comfortable in speaking on the topic, or inadequate to participate.
   b. Note number of attendees; number of active participants; any leading of the group by a particularly strong or vocal individual(s).
DIRECTING LEAGUE PROGRAM

JOB DESCRIPTION: PROGRAM ITEM (ISSUES) DIRECTOR

OBJECTIVES: To lead activities associated with a specific program area.

RESPONSIBILITIES:
1. Be familiar with national, state, and local program positions (and where appropriate, those of inter-League organizations). State and national program positions can be found in Impact on Issues (LWVUS) and Impact on Issues in New York State.
2. Review all files on your item. Subscribe to newsletters and magazines with information in your program area. Read all information about your item in state and national publications.
3. With board approval, represent the LWV on committees/organizations in your program area. Report to your board any pertinent information.
4. Form a committee. New members make an excellent source for committee members.
5. Formulate action which may be taken in this area on behalf of the League. Coordinate with the public relations director, the action director and the state League off board specialist for the appropriate area.
6. Understand the necessary channels to follow before action is taken or statements made. (See "Speaking with One Voice: Guide to Local League Action" in this section of In League in New York State.)
7. Monitor your item at all appropriate levels of government.
8. Assess current item position in order to recommend further areas for study. Conduct study and consensus meetings as directed by the board. (See "Directing a League Study" in this section of In League in New York State.)
9. Coordinate and assist other Leagues in your area.
10. Maintain files and prepare a year end report.

*****************************************************************************

Program and action are the heart of the League. Most members join the League to affect change, to influence public policy. The program item director is the person responsible for helping to affect change.

When taking action, remember these points:
1. Action may be taken under national, state, inter-League organization positions as well as under our own local positions.
2. No local position may be adopted or action taken which is in opposition to program positions of other levels of the League. However, a local League may choose to remain silent.
3. Action on positions of other levels of the League must be cleared with the appropriate person at that level.
4. Statements, letters, and action calls must be brought before the board for approval. Your League should have a policy for deciding the type of action to be taken on an emergency action call. All written communications should be signed by the president and the item chair.
5. Coalitions must be approved by the board (see "Guidelines for Coalitions" in this section of In League in New York State.)
DIRECTING LEAGUE ACTION ON ISSUES

JOB DESCRIPTION: ACTION DIRECTOR

OBJECTIVES: To oversee and coordinate the action activities of the local League.

RESPONSIBILITIES:
1. Assist the board in establishing annual local action priorities.
2. Be familiar with and up-to-date on local, state, and national League program positions and action priorities.
3. Coordinate League action, advise and assist program item directors and public relations director and state League off board specialists as needed. Make sure that appropriate board approvals are obtained and that members understand and agree with positions taken. (Review "Speaking with One Voice: A Guide to Local League Action" in this section in In League in New York State.)
4. Direct local response to state and national League action requests. Report to state and national Leagues the action taken and replies received.
5. Maintain contact with your state and national legislators and officials. Arrange and document periodic lobby visits with state and national legislators. Inform state and national Leagues of their positions on items.
6. Inform and involve members in action activities.
7. Maintain files on action taken and replies received.

"Action is agitating, organizing, educating, pleading, and persuading" - said Carrie Chapman Catt, a leader of the women's suffrage movement and founder of the League of Women Voters. Action is whatever the League does to influence government officials to implement the League's program goals. Action is sending emails, writing letters, visiting public officials, mobilizing public support and testifying at hearings.

In every League, one person needs to be responsible for coordinating the League's action activities. This could be an action director, an overall program director, or it may be the president. Coordination is needed in order to avoid duplicate requests to public officials and to make sure that League efforts are not so fragmented that they become ineffective.

In all action activities, it is vital that appropriate board approvals are obtained and that League members understand and support the League's position and the proposed action. It is equally important that appropriate procedures for taking action at the state and national levels be followed and that the state and national Leagues are kept informed of action taken and responses received.

SETTING ACTION PRIORITIES
At each level of the League, the appropriate board of directors determines action priorities annually. Priority issues should, of course, be based on League positions. Other points to consider are: impact the League can make, visibility, and member interest. If your League has just completed a local study, the time is right for action. Goals can be either long term or short term. Be flexible—if your issue dies during the year, maybe there is another for which the time is right.
DEVELOPING AN ACTION PLAN

1. For each action priority a plan of action should be developed. The plan should be divided into specific steps so that the board and those involved will be clear about what is required and how much time and work are involved.

2. Decide who will direct the action - the action director? Program item director? Form a committee to help. Often the study/resource committee members will be the nucleus, but others such as the public relations chair, the bulletin editor, and the publications chair should be included.

3. Determining which strategies would be best for achieving the League's purposes. Some possibilities are:
   a. lobbying officials
   b. testifying at hearings
   c. conducting a letter-writing or
d. email campaign
e. conducting a public forum or meetings
f. preparing information and fact sheets
g. writing letters to the editor, contributing to an Op-Ed piece and/or arranging for an editorial
   board meeting
   h. circulating petitions
   i. monitoring/observing
   j. organizing or joining coalitions
   k. informal surveys and polls
   l. developing a public display
    m. publishing an informational booklet

4. Develop a plan for the strategies you have decided on: e.g. a plan for contacting key public officials and mobilizing public support.

5. Inform and involve members in your plan. The earlier the involvement, the clearer the understanding, the stronger the commitment.

6. Determine an action budget. You may want to include the following items: production and/or purchase of publications and other materials; reimbursement of volunteers' expenses; postage, telephone calls, and travel; fees for joining coalitions.

7. Evaluate your campaign. Some questions to ask yourself as you prepare your evaluation: was the issue really important to the community; was the timing right; was the League's approach the right one/ where did the League's support come from; who was opposed; was it a victory or defeat; was the coalition effective? The evaluation will help in planning future action efforts.

MORE ABOUT STRATEGIES

Contacting Public Officials
Elected officials respond to their constituents. In addition to official League contacts with legislators, involve members in both email and letter writing and making personal contacts.

1. Letters: A concise, well written letter will have the greatest impact. When writing to elected officials, remember a few simple rules:
   a. Use the legislator's correct name, title and address.
   b. Reference the bill number and the purpose of the legislation.
   c. State clearly what you are asking the legislator to do (vote for or against; appoint the rest of the commission, etc.)
d. Localize if possible ("housing needs in our county are...")
e. Give reasons why the issue should be addressed.

2. **Visit to Legislators:** Remember that it is the firm policy of the League to contact only your own legislators. Remember to coordinate with other local Leagues in your area that have the same legislator. Further information on how to lobby can be obtained from the *State Board Report*, and from the state Legislative Director.

**Lobbying Techniques**

1. When possible, 2 or 3 League members should be present for a given lobby visit. One member should take notes.
2. Sign in and identify yourself at the legislator's office. Be sure to indicate if you are a constituent.
3. If the legislator is not available, ask to see a legislative aide. It is best to call in advance to see if a meeting is possible. If you do not have an appointment and cannot meet with your legislator, the aide is knowledgeable about the legislator's positions and will report your position. If neither is immediately available, ask for an appointment later in the day or at a later time back in the home district.
4. Be friendly and constructive. This is crucial—no matter what you think of a person's record, no matter what he/she may say that discourages or angers you, hostility or threats will be counterproductive. To make any impact, you must have an interested, receptive listener.
5. Know your legislator or official. Know his/her party, areas of interest, record in office, who and what he/she is influenced by.
6. Know your issue. Know the legislative process; know the facts on all sides of your issue; know the status of the issue. Good, factual information, well-presented, is your strongest ally.
7. Get your points across succinctly. Legislators and officials are enormously busy; they will be more receptive to your ideas if you don't waste their time. Don't let them duck the issue by changing the subject or bringing up irrelevant topics, or by monopolizing the interview. Give them brief, easy-to-read literature (such as a memo) with important facts and arguments highlighted. Don't issue too many memos—they will be ignored.
8. Treat legislators, officials and staff courteously. Always identify yourself immediately, since they see so many people it is difficult for them to place everyone immediately. Listen to their viewpoints; ask their advice. They are all potential friends—if not on this issue, then on a future one.
9. Concentrate on the positive. Look for actions and issues on which you can commend the legislator. Remember to thank him/her for their support or opposition to a measure on which you agreed. When necessary, express your disagreements firmly, but politely. Don't get into protracted arguments. We have something to say; we have a right to a portion of their time. Leave on a friendly note—you might think of something later to change his/her position. Respect off-the-record comments by keeping them confidential.
10. Admit when you don't know something. Find out the answers and get back to the legislator/staff person. Be sure to follow up—this could be the reason for your next contact.
11. Report all contact to your group. Communications between all those working on an issue is vital. Effective action is dependent upon putting together all the pieces.
12. Work with other groups who support your issue. Establish early rapport with other lobbyists, even those who may eventually disagree with you.

**REMEMBER:** Effective techniques are based on the **MERITS** of the issue, on credibility (the truth), and on **POLITICAL** considerations. Your legislator will offer support when he/she is **for** an issue, or if he/she is **neutral**.
Reaching the Public

There is a demand for news. Radio and television stations need to fill airtime and newspapers need to fill pages. Contact your local media and offer to help fill airtime and pages with the League’s message. Develop a working relationship with the media. Working with the media in your efforts to inform citizens will also serve to enhance your League’s visibility. The following suggestions may assist you in this effort.

1. **Media releases**
   Format should include: Media Contact/Address (TO)
   a. LWV Contact/Title (FROM)
   b. Date of Sending (DATE)
   c. Date of Release (RELEASE DATE) Usually this is immediately
   d. Subject (SUBJECT – title of topic)

   Be concise and straightforward. Releases should state who, what, when, where, and why. Send releases to all print media, radio and television stations in your area. The League member listed as the contact should immediately prepare several sentences written for the ear and ready to deliver on the air. Radio personnel frequently do telephone interviews after receiving a media release. When contacted for this purpose it is helpful to ask if this is being recorded.

2. **Editorial board meetings**
   If your local paper(s) has not taken a position on the League issue, contact its editorial board to schedule a meeting with the editors. Try to schedule a meeting when several members of the editorial board can meet with two or three League members. When scheduling the meeting be certain to ask how long the editors are planning on meeting with you. Prior to the meeting, League members should meet to determine the role each member will play and the specifics of the group’s presentation. Remember the goal is to convince the editorial board to write an editorial supporting the League’s position. Try to anticipate the questions the editors may ask you and also prepare a packet of materials to leave with each editor. During the meeting, your points should be made succinctly and include an explanation of how the League arrived at its position.

3. **Letters to the editor and op-ed pieces**
   Sometimes these formats are a more effective way to reach the public than a press release. A newspaper may, however, refuse to publish League letters if they are sent too frequently, even if they cover different issues. Guidelines for letters and op-ed pieces should be obtained from your local newspaper. Remember to ask your members to write individuals letters also.

4. **Radio and television appearances**
   a. Contact program directors of local radio and television stations to arrange an interview. While the message will be the same as the one used for an editorial board meeting, the League member appearing will be presenting our position and trying to convince listeners to support the League's position on a given issue. Remember that you are speaking for the League and to be careful not to inject your personal opinions. It is best not to wear "two hats" when representing the League to the public. The following suggestions may help you prepare for and enjoy an interview:
   b. Select several key points you want to stress. They should be simple, powerful, and relevant.
   c. Listen to or watch the program to become familiar with the host's style.
   d. Ask for specifics regarding the format; length of interview, other guests, taped or live, and policy on call-ins.
   e. Send the producer an accurate description of your credentials, including the correct pronunciation of your name.
f. Prepare answers to questions you anticipate the host may ask you. Effective answers should be brief, specific and in terms the audience will understand. Practice by writing out your answers and reading them out loud. Cut any irrelevant parts and delete parts you simply are not comfortable delivering.

g. Arrive ten or fifteen minutes before the interview and if possible look around and become familiar with the setting.

h. Once the interview begins, listen carefully to the interviewer's questions and seize the opportunities where you can reinforce your main points.

i. Be conversational and avoid jargon.

j. During commercial breaks do a mental rundown to make sure you are making your critical points. This is a good time to suggest to the host a specific area that you'd like to cover before the end of the interview.

k. Question patterns and hints on how to handle them

   i. The "A" or "B" question -"Which is more important to the League -campaign finance reform or the delegate selection process?" Answer, "They are both important and let me explain how they are related."

   ii. The multiple questions -"If the voters approve holding a constitutional convention, will the League work to reform the delegate selection process before the election of delegates? And will the League continue to work to reform the budget process?" Do not be confused by the multiple question approach, or the fact that one question is not on the topic being discussed. Answer only one question at a time and make sure you specify which question you are answering at a given time. Answer, "I will start by answering your first question, yes the League will work to reform the delegate selection process before the election. In July the governor submitted a bill that would amend the election law to reform the delegate selection process (etc.). Now to your question regarding the League's work to reform the budget process. Yes we will continue to work for the timely presentation of a budget. We cannot be certain that a constitutional convention will bring the changes necessary to reform the state budget process. The League's position regarding this process was approved by the League board in 1993. (Then you might explain the League's position.)"

   iii. The open question -"Tell me about the League's campaign to defeat the constitutional convention ballot question." Try to anticipate open-ended questions you may be asked and prepare in advance. This type of question provides an opportunity to explain how League functions to promote responsible citizen participation in government.

5. **Public service announcements (PSAs)**
   Discuss with local television and radio stations the possible use of PSAs to provide citizens with information.

6. **Speakers Bureau**
   A cadre of well trained speakers on a variety of subjects can be a service to the community as well as a means to further the League cause and image. Build interest by sending out a letter or brochure at the time that other groups make their program plans. A phone call in late summer or early fall when ballot proposals are known will prompt more invitations. During an action campaign, contact other groups and ask to speak at their meetings refer to the state League website at [www.lwvny.org](http://www.lwvny.org) for prepared speakers notes on specific topics.
7. **Informed Surveys**
   It may be helpful to know the prevailing opinions about your action goal. Surveys can be taken by mail or at shopping areas or fairs. Questions should be carefully formulated and tabulated to ensure proper results. The results will assist you in planning campaign strategy and give you interesting material to include in news releases and campaign material. A word of caution: scientifically valid surveys and polls are difficult to formulate and should be done by a professional.

8. **Public Meetings:**
   As your action campaign gathers momentum and community interest, you will want to share information among supporters. Open meetings can be used to communicate additional facts to enhance the effectiveness of the campaign.

   Sometimes a League chooses to hold an open forum which presents both sides of an issue rather than one advocating the League's position. (This format qualifies as an educational function and can be financed by tax deductible funds.) It should be decided in advance whether to include a statement giving the League position as a point of information at the meeting. Be careful in selecting speakers so that they are balanced and the League viewpoint is effectively represented. It is imperative that members be well informed beforehand about League position.
GUIDELINES FOR JOINING/WORKING WITH COALITIONS
(Updated March 2008)

In deciding whether or not to join a coalition, the following things should be considered:

1. Does the coalition have well-defined goals?
2. Are the coalition goals the same as LWV goals?
3. Are sufficient people and monetary resources available?
4. Is this a League priority?
5. Is the extent of League participation clear?
6. Will the League's nonpartisan policy be compromised?
7. Will the coalition enhance LWV visibility?
8. Will the coalition be limited to the agreed upon issue(s)?
9. Does the coalition leadership respect coalition goals and process?

The League should be certain that all press releases, letters and other material circulated to the public by the coalition will be approved by the League representative to the coalition or the League president in advance of publication.

Local Leagues joining coalitions on statewide issues must inform and get approval from the state board.

Local League boards should review and approve the joining of statewide or local coalitions. If the League is a member of an ILO, the local League should advise the other Leagues in the area of this desire to join the coalition.

COALITION BUILDING
(Updated March 2008)

A coalition is a cooperative arrangement between two or more organizations united by a common position on a single issue.

Why are coalitions useful?

1. Non-governmental organizations (NGO’s) that work together can accomplish more with fewer resources.
2. Money spent and a resource used by one group is augmented by the money and NGO of the other.
3. The connections and relationships of each NGO are enhanced.
4. By finding the right partner, an NGO can double its resources and work.

What are the risks?

1. Always be sure that a potential coalition partner is working towards the same goal
   Read their bylaws and their mission statement.
2. Be sure that your partner will bring your NGO real benefits. Does the other group have a good reputation? Many members? Effective Leaders? A sound budget? A good communications network and PR?

How do you build a coalition?

1. Coalition building is not hard. Meet with other groups and educate them about your organization.
2. Find out everything about their organization, (structure, funding, history, mission, etc.)
3. Main Steps:
   a. Identify potential partners (nearby local leagues, ILO’s in your area, American Association of University Women, NYPIRG, Common Cause, local colleges and universities, etc.)
   b. Educate them and yourself about the issues. Go to each other’s meetings.
   c. Meet with your prospective partners and plan the program/project. Be clear about your goals and mission.
   d. Activate your coalition by assigning tasks, responsibilities and cost sharing.
   e. Assign tasks and be clear about who is doing what? Have deadlines. It is a good idea to have co-chairs, one from each organization to be responsible for checking on their own people as to deadlines, completions, etc. Sponsor public forums together. Write a proposal for a joint project.

Principles for successful coalitions:
The purpose of the coalition must be clearly stated and widely understood. Coalition partners must see each other on a regular basis and plan strategies, activities, or projects together. Each member of a coalition must participate in a meaningful way. Don’t just talk about it. Do it!

Testifying at Hearings
Giving testimony at legislative hearings is an opportunity to represent the citizen point of view. Hearings are most commonly held to compile information about legislation in the planning stage. After legislation is passed and implemented, hearings might be held to gather facts about the impact of the law. (Observing a hearing also is a valuable experience.)

1. Before the Hearing:
   a. Locate the hearing through government websites, newspaper articles, legal notices, radio announcements. Legislators may advise you of hearing dates if aware of your interest.
   b. Know what local/state laws and ordinances pertain to the hearing subject.
   c. Know how the hearing subject relates to current League study and position.
   d. Know the rules of the body before which you will testify.
   e. Notify the hearing chair of your intention to testify. Ask if there are time limits.
   f. Testimony given in the name of the local League must be approved by the local League president and if it has a statewide impact, must be approved by state League.
   g. Type your testimony. You will probably be asked to provide a specific number of copies for the legislative body holding the hearing. In addition, have enough copies to distribute to members of the press.
   h. Notify the state League prior to testifying before a state agency, commission or committee.

2. At the Hearing:
   a. Identify yourself and your League.
   b. Deliver a clear, concise statement. Make it interesting.
   c. Do not be too technical. Important technical data can be attached to your written statement.
   d. Give examples of the benefits that would result from the adoption of the League position and give alternatives to proposals with which the League disagrees.
   e. Anticipate questions that may be raised and be prepared to answer them. Don't be afraid to say that you can't answer a particular question at the time. Offer to supply the answer later.
   f. Thank the committee for listening.
LOBBYING FOR OTHER LEVELS OF THE LEAGUE

Local League lobbying support is vital for the implementation of program goals at the state, national and ILO levels. Several times each year the state and national Leagues will issue action calls requesting that local Leagues take immediate action on a particular issue.

The president is responsible for sending an official letter or taking the requested action on behalf of the League but the program item director, action director or another member may draft the letter for the president's signature. The writer may co-sign the letter with the president. A copy should be kept in the local League file and another copy sent to the state or national League. A copy of the reply also should be sent to the state or national League if it contains information of interest or an indication of the attitude of the legislator. Depending on the timing, League members may also be asked to lobby on the issue.

The state Issues and Advocacy Committee and staff at the League's Albany office coordinate the lobbying efforts of the state League. Directors from the state board coordinate the lobbying of legislators and their aides, analyze proposed legislation, and prepare the legislative memos.

Local Leagues in all parts of the state can support these efforts by sending to the office any information they learn about their own legislators' positions on legislation which the League supports or opposes. Copies of letters, testimony, etc., as well as responses received, should be included so that a full picture of League action in New York State can be developed.

MANEUVERING AROUND THE CAPITOL

How To Find The Information You Need

1. LEGISLATIVE INFORMATION
   - Public Information Office
   - Bill Status: 1-800-342-9860, open 9 a.m.-5 p.m., weekdays, all year; offers basic bill information and will mail copies of bills on request.
   - Bills, laws, and their histories are available on-line at http://public.leginfo.state.ny.us/menuf.cgi.
   a. Assembly
      - The Assembly’s homepage is http://assembly.state.ny.us/. From there you can obtain information about Assembly members, bills and legislation, public hearing calendars, legislative reports, committee schedules, and information about commissions and task forces. The list of Assembly Committee schedules and the bills to be considered in each meeting are listed as a sidebar to the bills and legislation section.
      - The Public Information Office in Room 202, Legislative Office Building, Albany, NY 12248, (518) 455-4218 is the place to go for copies of bills and their histories, voting records on the bills acted upon in the Assembly, attendance records of individual Assembly members, debate transcripts, Assembly and committee agendas, memoranda relating to specific legislative proposals, annual reports of Assembly committees, salary records of Assembly employees, status of particular bills, and other information relating to the activities of the Assembly. It is open from 9 a.m. to 5 p.m., Mon.-Fri. You can review this information in the Public Information Office or obtain copies for 25¢ a page.
b. **Senate**
   - The Senate homepage is www.nysenate.gov. You may obtain the same information for the Senate that is available for the Assembly.

c. **Committee Schedules**
   - Committee agendas and calendars for each chamber are reviewed by the vice president/advocacy & issues by going to the Senate and Assembly websites to learn whether LWVNYS bills are to be discussed. Agendas are usually issued weekly, on Friday or Monday. Agendas are available at the Public Information Office, Room 202, Legislative Office Building (LOB) or Calendars are issued for each day of the session, usually the day before the session. Lobbyists are expected to attend committee meetings and report to the legislative director and the Off-Board Specialist.

d. **Budget Bills**
   - Budgetary material is available on-line once the Governor sends the Executive Budget to the Legislature, either through the Governor’s website, the Division of Budget website, or the Assembly and Senate websites. A printed version is also available in the Capitol. For your area of expertise, you should get the appropriations bill, the Article VII (program) bill, the policy overview, the agency presentation, the State’s five-year financial plan, and five-year capital program and financing plan.

e. **Budget Hearings**
   - Once the budget is available, a list of hearings will be published. If you wish to present testimony, get your name on the list by calling the number of the person in charge of the hearing.

2. **ADMINISTRATIVE INFORMATION**
   a. **Administrative Regulations**
      - Existing administrative regulations are available on-line at www.dos.state.ny.us/infor/nycrr.htm. This is the on-line version of New York Codes, Rules, and Regulations (NYCRR), the compendium of administrative regulations, organized by agency.

   b. **Proposed Regulations**
      - The New York State Administrative Register is published weekly and is available on-line at www.dos.state.ny.us/info/register.htm. Click on the year you wish to view, and click on the date of the Register you wish to view. Proposed regulations are listed in the Action Pending Index.

   c. **Administrative Hearings**
      - The public is invited to submit written testimony in support of or opposition to proposed regulations. In addition, public hearings may be held around the state, at which member of the public are invited to testify.

3. **STATE ADMINISTRATIVE AGENCIES**
   a. **Agriculture and Markets**
      - Serves agricultural producers and the consuming public. Promotes agriculture through various industry and export development programs; enforces food safety laws.

   b. **Audit and Control**
Maintains the State’s accounts; pays the State’s payrolls and bills; invests State funds; audits State agencies and local governments; and administers the State employee retirement system.

c. **Banking**
Primary regulator for State-licensed and State-chartered financial entities operating in New York, including: domestic banks, foreign agencies, branch and representative offices, savings institutions and trust companies, mortgage bankers and brokers, check cashers and money transmitters. Ensures the safe and sound conduct of these businesses, maintains public confidence in the banking system and protects the public interest as well as the interests of depositors, creditors and shareholders.

d. **Civil Service**
The central personnel agency for the Executive branch of State government. Provides the State of New York with a trained workforce; administers health, dental and insurance programs covering State employees and retirees as well as some local government employees; and provides technical services to the State’s 102 municipal service agencies, covering approximately 392,000 local government employees.

e. **Correctional Services**
Operates facilities for the custody and rehabilitation of inmates.

f. **Economic Development**
Creates jobs and encourages economic prosperity by providing technical and financial assistance to businesses.

g. **Education**
Supervises all educational institutions in the State, operates certain educational and cultural institutions, certifies teachers and certifies/licenses 44 other professions.

h. **Environmental Conservation**
Administers programs designed to protect and improve the State’s natural resources.

i. **Executive**
There are numerous agencies within the Executive Department to accommodate governmental functions, including Budget and divisions and offices that do not logically fit into the framework of the other departments, such as the Division of Veterans’ Affairs (which advises veterans on services, benefits and entitlements, and administers payments of bonuses and annuities to blind veterans) and the Office of General Services (which provides centralized data processing, construction, maintenance and design services as well as printing, transportation and communication systems).

j. **Family Assistance**
Promotes greater self-sufficiency by providing support services for needy families and adults that lead to self-reliance.

k. **Health**
Protects and promotes the health of New Yorkers through enforcement of public health and related laws, and assurance of quality health care delivery.

l. **Insurance**
Supervises and regulates all insurance business in New York State. Issues licenses to agents, brokers and consultants; conducts examinations of insurers; reviews complaints from policyholders; and approves corporate formations, mergers and consolidations.

m. **Labor**
Helps New York work by preparing individuals for jobs; administering unemployment insurance, disability benefits and workers’ compensation; and ensuring workplace safety.

n. **Law**
   Protects the rights of New Yorkers; represents the State in legal matters; and prosecutes violations of State law.

o. **Mental Hygiene**
   Provides services for individuals suffering from mental illness, developmental disabilities and/or substance abuse.

p. **Motor Vehicles**
   Registers vehicles, licenses drivers and promotes highway safety.

q. **Public Service**
   Ensures that all New Yorkers have access to reliable and low-cost utility services by promoting competition and reliability in utility services.

r. **State**
   Known as the keeper of records, the Department of State issues business licenses, enforces building codes, provides technical assistance to local governments and administers fire prevention and control services.

s. **Taxation and Finance**
   Collects taxes and administers the State’s tax laws.

t. **Transportation**
   Coordinates and assists in the development and operation of highway, railroad, mass transit, port, waterway and aviation facilities.

**LEAGUE POSITION AND THE INDIVIDUAL MEMBER**

Some League members feel uncomfortable because they do not have all the facts to speak out in an all-out action campaign. These members should be reminded that only the identified League spokesperson, usually the president, is responsible for getting the League position to the public. League members should be encouraged to express views individually and can share the information obtained as a result of the League's study.

The following reminder about consensus and action which was included in the January 1980 LWVUS Post Board Summary bears repeating: "We hope that those of you who are steeped in the League program process are passing along the tradition: Once a position is arrived at, that is the League position. The relevant board determines when, where and how to apply the position thereafter. It is the prerogative of a member to take no action or to take contrary action as an individual. A board has the first choice but not the second. It may decide not to act, and communicate its reasons to the responsible board. It may not decide to 'take consensus' on the position or the application, and it may not take contrary action."

**KEEPING RECORDS**

It is very useful to maintain files on individual legislators - their views on League issues, their fields of expertise and interest, contacts made, newsletters, etc. In addition, records should be kept of all League action taken, including the following:

1. Copies of statements, testimony, media releases.
2. Details about and analysis of campaigns undertaken.
3. File of officials involved in the issue. (Who was on your side, who opposed, etc...)
4. Newspaper accounts, legislative newsletters, reports of interviews and phone contacts, letters sent and received.
5. File of organizations with names, addresses, common goals, dates and topics of any speeches by the League at their meetings.

**ACTION CALENDAR**

**ALL YEAR**
- Respond to state and national action calls.
- Keep members informed with background information and action updates, particularly on priority issues.
- Encourage every-member action through bulletin articles, telephone chains, e-mail, Fax, mailing, etc.
- Work with the public relations director in getting publicity for your League's action.

**SUMMER**
- Review action files. Become familiar with positions and reference publications. Order *Impact on Issues* from LWVNYS or download from the state League website at www.lwvny.org and *Impact on Issues* LWVUS at www.lwv.org if you do not have access to an up-to-date copy.
- Plan calendar. Try to anticipate focus for action on all levels and make preliminary plans.
- Assist board in establishing local action priorities.
- Determine plan for responding to action calls.

**FALL**
- Oversee campaign on ballot proposals.

**DEC/MAR**
- Organize state and federal lobby visits.

**FEB/MAR**
- Reevaluate action priorities.

**APRIL/MAY**
- Report to annual meeting.

**RESOURCES**
- Nonpartisan Political Policy Handbook (LWVUS)
SPEAKING WITH ONE VOICE: ACTION GUIDELINES FOR LOCAL LEAGUES

ACTION NOT REQUIRING CONSULTATION
1. Any action taken in response to an action request from the state or national League does not require any consultations. As they say just do it and thanks. These requests can be the form of Calls to Action or Action Alerts from state or national, or in the Voter articles, our state Grassroots Lobby Corps, and State Board Reports.
2. Legislation on which the state League has already taken action. Every State Board Report (SBR) contains a list of bills in the state legislature that the state League has taken action on; also these bill summary sheets are sent to the action network periodically. You do not need to consult with anybody to contact your state legislator on any of the bills listed in these state action summaries.

The National League is a bit stricter in keeping to its current Issues for Emphasis. State and local Leagues wishing to take action on a national issue on which they have not received recent information from LWVUS should consult with the national office.

ACTION REQUIRING CONSULTATION
1. Action by a Local League at the Local Level – The decision to take action that will affect only your community rests with your local board.
2. Action that would affect more than one League requires consultation with the boards of the other League in the area involved.
3. Action that would involve contact with state government officials (senators, assembly, the governor, etc.) where no action has been requested and no state action has been taken (bill is not on the bill summary sheet) requires consultation with the state issues committee or the state Issues and Advocacy Vice-President.
4. Action that would involve contact with government official at the national level where no action has been requested by LWVUS requires consultation with the National office.

No League may take action in opposition to a League position. If your League disagrees with a position statement, you should remain silent.

Other Caveats
League members may contact their own representatives at the state and national levels and leadership in the legislature.

Generally the president, or her designee speaks for the League. The rest of us speak as constituents supporting this particular League position on this particular legislation.

Local Leagues should send copies of all communication with state legislators to the state league; copies of communications with federal representatives should be sent to the national office.

ALWAYS NOTIFY THE STATE LEAGUE AND THE NATIONAL LEAGUE CONCERNING CONTACTS WITH THE RESPECTIVE REPRESENTATIVES. See guidelines for joining coalition.
FINANCIAL DISCLOSURE REQUIREMENTS FOR ACTION ON BALLOT ISSUES

The NYS Election Law requires, under certain circumstances, that groups supporting or opposing ballot issues file disclosure forms similar to those filed by groups supporting candidates. The requirements, as they apply to local Leagues, can be summarized as follows:

- If a local League wishes to support or oppose a ballot issue and plans to spend less than $100, no filing is needed.
- If income or expenditures will exceed $100 but will be less than $5,000, a political committee must be established and a form reporting all contributions must be filed with the local board of elections. All expenditures and liabilities must also be reported.

Therefore, if a local League wishes to take action on a ballot issue and plans to spend more than $100, it should form a political committee, naming a board member as treasurer and establishing a separate bank account. The League itself is not the political committee. The League can put, say, $200 (taken from regular funds) in the bank account to be spent on the ballot issue. More money can be added at any time, and excess funds can be returned to the League at the end of the campaign.

Keep complete records of dollars collected and spent. Filing forms are available from the county board of elections or the clerk of the village, town or city involved. An article mailed in a regularly mailed newsletter or bulletin is not considered a campaign expense.

(Revised 2000)

PROCEDURES AND GUIDELINES FOR STATE AND LOCAL LEAGUE PARTICIPATION IN LEGAL ACTION

A local or state League can litigate as a plaintiff or as an amicus curiae (friend of the court) in a wide variety of cases. When any legal action is being considered and before any commitment is made, a local League must notify the New York State League board (policy adopted by the state League board 3/1/93). Leagues should be aware that litigation is time consuming and expensive. Even if an attorney is willing to work without fee the question of what costs might be incurred and who will pay for them must be discussed prior to commitment. League members should be informed when any decision to take legal action has been made by a local or the state League board.

The basis purpose of an amicus brief is to provide the court with special information, expertise or insight that it might not receive from the litigants. In a legal sense it is nor meant to be a "lobbying" or a public relations technique where the more support registered the better. However, for practical purposes, organizations and agencies use this as a mechanism for showing support.

If the League is asked to participate in legal action where others are taking the lead, these questions should be considered:

1. Is this an organization or cause with which we wish to be associated? What does it expect to accomplish through court action? What other organizations or individuals are participating?

2. Who will actually prepare the appropriate legal documents? Who will make the argument, if any? Be sure it is an attorney who can devote sufficient time and resources to do a reputable job. Is the attorney...
familiar with the subject in question? Has she/he access to resources necessary to understand the subject?

3. What is the time frame? Haste is the biggest obstacle. There should be time for:
   a. the League to see a preliminary draft and approve this substantive trend of the argument;
   b. the League's legal advisor to study and comment;
   c. approval of the final draft both by the League director or committee responsible and by the League's legal advisor.

4. A written commitment should be given that nothing will be filed or published by the major litigant that the League has not seen and approved.

OBSERVERS: THE EYES AND EARS OF THE LEAGUE

Basic to effective League activity in a community is understanding how the local government works. A local League observer is the eyes and ears of the League, learning how government works and about issues that are or may become items for local study and action. Consistent League presence at these meetings can add to the League's visibility and credibility.

The Open Meetings Law ensures "the right of all citizens to have advance notice of and to attend all meetings of public bodies at which any business affecting the public is discussed or acted upon, with certain limited exceptions to protect the public interest and preserve personal privacy." Consistent with this purpose, the general requirement of the law is that "all meetings of public bodies shall be open to the public at all times."

As an observer, you are exercising that recognized right to be present at any public meeting.

OBJECTIVES
To monitor governmental bodies for information of importance to the League and the community/state.

RESPONSIBILITIES
1. Attend assigned meetings, arriving promptly.
2. Take notes/fill out observer form.
3. Report to the board.
4. Advise the board of opportunities for action on League positions.

PROCEDURES
- The president can write a letter to the proper official introducing the observer(s). The letter can also request copies of meeting agendas if they are available.
- As a courtesy, observers should introduce themselves to the meeting chair.
- Remember observers are there to observe.
- Observers may ask questions for clarification, information or knowledge. Keep an impartial attitude.
- Observers may speak for the League only if authorized to do so. Use written comments approved by board so you won't be misunderstood, and leave a copy for inclusion in minutes of meeting. Have copies for distribution to the members of the board/agency and media.
- Take notes during meeting to help in preparing a report for the League Board.
REPORTING

1. **FORMAL**
   a. Include the name of the board or agency, date, place and names of officials present and absent.
   b. Describe the business, particularly those items pertinent to League program.
   c. Comment on the conduct of the meeting and standards used in reaching decisions.
   d. Include pertinent personal observations on attitude of participants, both the members of the board or agency and those in the audience.
   e. Remember to include the name of the observer(s).
   f. Attach the agenda and any news articles.

2. **INFORMAL**:
   a. If the board/agency you are observing is acting according to established procedures, purposes and is reasonably covered in newspapers there may be no need for a formal report. But, if the League has special concerns or an observer finds conduct questionable, a formal report should be done.
   b. In either case, the board should receive regular reports that you have attended meetings.

TECHNIQUES

- Be familiar with League program. Read state and national "Impact on Issues."
- Understand the function and responsibilities of the board/agency being observed.
- Know the names of the board or agency members and staff.

Follow-up is most important. Be sure to write reports, if necessary and share information with the appropriate program item directors.

Being an observer can be interesting and fun. It puts the League on the inside, hearing decisions that will affect the community/state and the League.
VOTER SERVICE
VOTER SERVICE

JOB DESCRIPTION: VOTER SERVICE DIRECTOR

OBJECTIVES: To encourage citizens to register and vote. To provide voters with accurate, timely and interesting nonpartisan information on elections, candidates, and the political process.

RESPONSIBILITIES:
1. Uphold the nonpartisan policy of the League.
2. Recommend voter service activities for the year for board approval.
3. Appoint and oversee a committee to carry out the planned projects.
4. Strongly consider the production of a voters guide, or partnering with another organization which will produce a voters guide.
5. Promote voter registration and voter turnout. Provide voters with information on voting procedures, candidates and issues.
6. Be aware of the public relations, membership, fundraising opportunities provided by voter service.
7. Handle requests for League speakers on election-related topics and citizen education (non-election voter service.)
8. If there is a league website, make sure that up-to-date voter service related information is included and/or that appropriate links to that information are provided.
9. If there is a League telephone, make sure that the person in charge has appropriate and up-to-date voter service information.

WHAT IS VOTER SERVICE?
A key function of the League's voter service activities is to provide nonpartisan information to voters in order to increase participation in government. Voter service is a year-round function of the League with the most intense activity occurring in the periods immediately preceding elections. Voter service, as well as disseminating factual information, deals with the mechanics of voting.

Those participating in voter service activities must be well-briefed on New York State's election law. In local Leagues where there are both voter service and election law directors, they can work together to complement their activities. Often election law changes will have an effect on voter service activities, and it is the responsibility of the voter service director and committee to inform the public of these changes.

Pre-election services provided by many Leagues include:
- Voter registration drives
- Get-out-the vote drives
- Information on local and state ballot proposals, including the major pro and con arguments
- Production of a Voters Guide listing candidates seeking public office (including minor party candidates and those running as independents, their vitae, and, often, their views on selected local issues}
Year-round voter service activities should provide citizens with information and assistance so they will become more active in the democratic process. This can be done in many ways:

- Publishing directories listing names and addresses of elected officials, meeting dates of government bodies, etc.
- Issuing information on voter registration, political party enrollment and absentee voting.
- Monitoring local election law.
- Forming a Speakers' Bureau to disseminate League information.
- Conducting seminars on a broad range of topics (e.g. how town government works and what services it provides)

All of these voter service activities not only fulfill one of the primary missions of the League, but they are also a way of publicizing the League, attracting new members and even earning money.

Voter service does not advocate for any League position. Program and action activities are NEVER to be mixed with voter service activities. For example, a voter service speech on court merger must not be titled, "Why New York State Will Not Survive Without Court Merger." Clearly, that's program action. More appropriately a voter service speech would be "Court Merger: Some Arguments For And Against." Special care must be taken when the League is supporting or opposing a ballot proposal to separate voter service from advocacy. Questions should be referred to the LWVNYS voter service director.

THE DIRECTOR'S JOB
Voter service is one of the most highly visible League activities. Political parties, factions within parties, candidates for elective office and issues must be treated equally and in an unbiased way. It is of the utmost importance that all activities be carried out in a nonpartisan manner. It is the job of the director to see that this happens. Additionally, the voter service director should:

- Be above reproach and squeaky clean.
- Meet with the last voter service director and discuss past activities.
- Have copies of *The Road to the Voting Booth*, Parts I, II and III and be familiar with their contents (see list of resources).
- Recruit a committee to plan a tentative voter service calendar for the year and then delegate responsibilities to members of the committee.
- Inform and receive approval from the board on all planned activities.
- Recruit a group of League members willing to fulfill requests for League speakers or moderators.
- Oversee all activities, offer guidance, and keep each committee member on target.
- Stay flexible so plans can be revised to take advantage of unforeseen opportunities or to cancel an activity that previously seemed worthwhile.
- Fill out and return the annual voter service questionnaire to the state League office.
• Send copies of voter service publications, newspaper clippings and reports of successful and/or unusual voter service projects as follows:
  o 1 copy to state office
  o 1 copy to the national office
• Accept praise on a job well done.
• Prepare a year-end report with recommendations for changes.

WHAT THE DIRECTOR CAN EXPECT FROM LWVNYS
• Articles in State Board Reports on timely topics.
• Basic registration and voting information, accurate dates and deadlines for the current year.
• Publications to purchase for resale or free distribution, including the LWVNYS Voters Guide, which contains pros and cons on state ballot proposals, information on statewide offices and on registration and voting.
• Speakers notes which contain detailed information for use in the preparation of pre-election voter service speeches.
• Information on all statewide candidates, questionnaires for New York State legislative candidates, and assignment of responsibility for Congressional questionnaires. (See The Road to the Voting Booth for complete explanation.)
• Advice and training.

SPEAKERS BUREAU
The League is often asked to speak to groups. Therefore, many Leagues organize a Speakers' Bureau made up of members who can speak on a variety of topics in which the League is interested. It is imperative to remember, however, that all topics must be approached in a strictly nonpartisan manner. The Road to the Voting Booth Part I includes a section on setting up a Speakers' Bureau.

RESOURCES
• League Basics (In League) (LWVUS): An essential tool for League leaders.
• Welcome to the League (LWVNYS): Contains general information about the League.
• The Road to the Voting Booth (LWVNYS): Part I is a handbook for voter service directors, Part II a handbook on candidate forums, Part III a handbook on voter registration drives.
• Voter Service Chair (LWVUS)
• Voters Guide Best Practices (LWVUS)
• State of New York Election Law
• State of New York Education Law
The purpose of League sponsored debates and forums are fourfold:
1. To educate the public about the issues in the campaigns;
2. To provide an opportunity for voters to hear candidates discuss those issues face-to-face;
3. To stimulate public interest and participation in the elections;
4. To provide an opportunity for the public to engage their candidates.

The League believes these purposes are best served by adoption of nonpartisan, objective, and understandable written criteria for candidate inclusion. To that end, the League will apply the following guidelines in determining whether candidates have the right to participate in League sponsored debates and forums.

Guidelines for Candidate Participation:

1. Constitutional eligibility: The candidates must meet the requirements of the NYS Constitution and the Constitution of the United States.
2. Ballot Access: The candidates must meet all requirements to be on the ballot according to NYS Election laws.¹
3. Financial Compliance: The candidate must show that all financial reports required by the NYS Board of Elections have been filed and verified.
4. Demonstration of significant voter interest and support. Candidates may demonstrate significant voter interest and support by meeting one of the following two requirements:
   a. The candidate seeks to be (in the case of a primary election) or is the candidate of a party, as that term is defined in section 1-104(3) of New York State Election Law;² or
   b. The candidate can demonstrate significant statewide interest and support, as evidenced by:
      c. Evidence that a formal statewide campaign is being waged; e.g., presence of headquarters, campaign staff, issuance of position papers, campaign appearances throughout the state, fundraising activities, etc;
      d. Receipt of 5% of support in one or more current nonpartisan statewide public opinion polls.

Based on the above criteria, a final determination of eligibility for participation will be made by the Board of Directors of the League of Women Voters of New York State.

(Revised and Adopted by the LWVNYS board 7/10/07)

---

¹ When ballot access has not been certified by the New York State Board of Elections, whether because the date for certification has not yet or arrived or because a legal challenge of one or more candidates has delayed certification, the League shall exercise its judgment about which candidates to invite and may invite any candidate whom it believes has a reasonable possibility of obtaining ballot access.

² When the ballot has not yet been certified by the New York State Board of Elections, whether because the date for certification has not yet or arrived or because a legal challenge to one or more candidates has delayed certification, the League shall exercise its good faith judgment about which candidates to invite and may invite any candidate whom it believes has a reasonable possibility of obtaining ballot access of a party.
FORMATS FOR CANDIDATE DEBATES

There are several possible formats for candidate debates. Three are outlined below. All debate formats should allow equal time and be fair to all candidates:

1. Opening statements by all candidates with the order of speaking determined by lots. Questions from the audience. Closing statements in reverse order from opening statements. The audience can ask questions in person or questions can be written on cards distributed when audience members enter the debate area. Written questions can be given directly to the moderator or League members can screen the questions to avoid embarrassing, non-answerable or duplicative questions. This procedure allows all who wish to ask questions to do so without risking disruption. It has the added advantage to the moderator of having questions in hand to repeat accurately, if necessary.

2. A second format involves having a media panel (newspaper, radio, TV reporters) ask the questions. All candidates have the opportunity to answer all questions and the panel is usually limited to no more than four. Open statements can be omitted with this format but closing statements should be included.

3. The "Cumulative Time Debate Format" is a third debate format that promotes interchange between candidates, allows them to hold each other accountable and keeps voter interest while enabling them to see the differences among the candidates. Each round of questioning is initiated by the moderator. The same question is addressed to each candidate before debate between/among the candidates is invited. Candidates take turns being the first to answer a question.

The candidates are timed by their own timekeeper and cumulative time is kept for each. All timekeepers hold up signs indicating the amount of time used by each candidate. The moderator and the candidates see how their time usage compares, and can self-moderate to balance significant discrepancies. The candidates who are behind can avail themselves of the opportunity to use more time. This format encourages a candidate to respond briefly on a topic deemed to be less important or on which there is no disagreement and to use more time to discuss more fully issues considered more important.

Candidates are encouraged to debate and hold each other to account rather than having this role assumed by the moderator. The moderator simply reminds the candidates of the clock and moves to another question when the topic appears exhausted. Candidates are not allowed to "save up" time during the questioning to make a speech at the end. A two minute closing statement may be permitted under this format.

DEBATE CO-SPONSORSHIP GUIDELINES

It is important that the League of Women Voters of New York State maintain its nonpartisan position when co-sponsoring a debate. The first step in agreeing to co-sponsorship is to review the other organization's mission statement to ensure what its goals are consistent with those of League.

Any organization co-sponsoring a debate must meet the following conditions:

- refrain from endorsing candidates prior to or immediately after the debate,
- follow the League's guidelines for candidate participation,
- agree to accept the League's standards of nonpartisanship and debate quality,
- treat the candidates equitably, and
- agree to jointly issue all press releases, letters, and other material circulated to the public.
DEBATES JURISDICTION POLICY
The LWVNYS has sole jurisdiction over debates for statewide office. LWVNYS may delegate the operation of a debate for statewide office to a local League, providing that state League guidelines are used and that the sponsoring League submits its plan to the LWVNYS in a timely fashion.
(Adopted by the state board June 28, 1992.)

Using these principles, local Leagues are encouraged to adopt policies and guidelines for local debates. It is preferable that such policies be discussed and adopted prior to election periods.

EMPTY CHAIR DEBATES
U.S. Congressional Debates - If a candidate is running for public office (i.e., U.S. Congress), you cannot hold a debate unless there are at least two candidates "face to face" (there cannot be a substitute for a candidate); therefore, with only one candidate you have no option but to cancel. Federal Election Commission (FEC) regulations state that this holds even if a candidate just does not show up at the last minute. If you proceed with only one candidate for U.S. Congress our nonpartisan status would be jeopardized.

- State and Local Debates - If a candidate is running for the NYS legislature or for town/city office, the above rules do not apply unless you are planning to hold your debate at a television studio. Television comes under Federal Communications Commission (FCC) guidelines and you will need to learn from the television station if it can proceed with only one candidate. Otherwise, the decision is up to you. Your board should have a policy to cover the possibility of a candidate's withdrawal or refusal to participate. Some Leagues permit those who will be unable to attend to submit a brief opening statement to be read by the moderator or a designated member of the audience. Others prefer to have the moderator announce that the absent person is a candidate for the office and that copies of a written statement, if one is provided, are available on the literature table. Obviously the League would prefer not to have only one candidate since it is not a debate and the public loses an opportunity to compare candidates' views; however, the idea that an "empty chair debate" is possible can be a very powerful incentive to get the reluctant candidate to agree to debate this opponent.

- Policy Regarding Bulletin Ads from Candidates - Ads accepted for League publications should indicate support for the League and should not solicit or suggest support for a candidate or political party. If advertising is received from a candidate or political party, a statement should appear on the same page stating that the League does not support or oppose political parties or candidates. Such ads should not appear in the two-month period prior to election.
GUIDELINES FOR CONDUCTING COMMUNITY ELECTION

Community organizations often ask local Leagues to administer elections for their Boards of Directors or for issues that need member decision. Examples of organizations which might request this service are local citizen groups, housing authorities, health groups and condo associations.

This is an area where Leagues can volunteer their services, but where they can, most appropriately, charge a fee. Usually the organization has a budget which funds their election process. Their need is finding competent administrators.

For Leagues new to this area of service and/or fund raising the following guidelines may be useful.

1. Meet with the organization representatives to learn the type of election to be administered and what the League's responsibilities will be. Questions you will want to ask are: Will the voting be by paper ballot or machine? If paper, who prints them? If machine, who will set it up? In either case, who makes the arrangements? How many polling places will be necessary? For what hours? How will you determine who is eligible to vote? Will there be a procedure for challenging ballots, and deferring a final vote count until challenged ballots have been verified or disqualified?

2. Review a copy of the organization's bylaws to determine the rules that govern its election process.

3. Working from the bylaws, determine the date that the election is to be held. Set up a timetable by counting back the required number of days for each phase that must be scheduled. Include the nominating process, even though this is not a League responsibility, because a delay in that phase may disrupt the rest of the schedule.

4. Put in writing your understanding of exactly what the League is responsible for and what the organization will provide. Include in this document a statement that all literature and ballots state that the League is a nonpartisan organization supervising balloting procedures only and takes no position on issues or candidates before the voters in the particular election and that any literature or ballot that uses the League's name must be subject to prior approval by the League. Get this statement approved and signed by the organization.

5. The League is the custodian of the ballots until such time as the results have been certified by the League or until the League withdraws from its supervising role. Establish ahead of time who the ballots should be returned to in the latter event. When paper ballots are used, have a League member check the copy before it goes to the printer. It is disconcerting to find when the polls are ready to open that the ballots are wrong. Avoid the opportunity for fraud by having a League member pick up the ballots from the printer. If ballots are not numbered, number each one as it is given to the voter.

6. After the ballots are counted, give the unofficial results to the representative of the organization who is present. Submit your formal statement of the vote in typed form and signed. (Certified by Jane Doe, League of Women Voters of Fair City"--either the election administrator or the president.)

7. In setting a fee, charge enough to pay poll workers if you must. It is possible that you won't have enough League volunteers to staff the polls. You may also have costs for copying instructions and for training sessions. The time of the person who will organize the election, settle the contract details, go to planning sessions and write the final report should be compensated for.

8. As soon as possible after the election, meet with the League members who worked on the election for review and evaluation. Write a detailed report for another year or another election.
LEAGUE OF WOMEN VOTERS OF NEW YORK STATE
FAIR CAMPAIGN PLEDGE

As a candidate for public office in the 2004 election, I pledge the following:

- I will conduct my campaign honestly, openly, and fairly. I will discuss the issues and participate in fair public debate with respect to my views and qualifications.

- I will not engage in, permit, or condone defamatory attacks upon the character of my opponent(s); nor will I engage in invasions of personal privacy unrelated to campaign issues.

- I will not use or permit the use of any campaign material or advertisement which misrepresents, distorts, or otherwise falsifies facts regarding my opponent(s).

- I will refuse to disseminate any campaign material or message in which the candidate is not prominently identified.

- I will publicly repudiate support from any individual or group whose activities would violate this Fair Campaign Pledge.

In signing this pledge, I assume personal control over and responsibility for the conduct of my campaign.

Signature: ________________________________

Print Name: ______________________________

Office sought: ______________________________

Date: ______________________________

Please return signed pledge to: ______________________________

________________________________________

________________________________________

________________________________________
GUIDELINES FOR PUBLISHING VOTERS GUIDES

LEAGUE GUIDELINES

Because it is essential that all candidates be treated alike, the Board of Directors of LWVNYS has issued the following guidelines for use by local Leagues when publishing Voters Guides:

- The local Board of Elections is the most reliable source of information on local ballot proposals and candidates. Local Leagues should secure preliminary information from the Board of Elections, follow local newspapers, and check with political parties.

- All candidates appearing on the ballot must be included in a Voters Guide. If, after several attempts to secure this information, it is not forthcoming, the League will include the candidate's name, party, and the office the candidate is seeking.

- Depending upon the situation, the local League will print a sample disclaimer for candidates who do not respond; i.e., "This candidate did not respond to the League's inquiry." or "This candidate chose not to respond."

- If sample ballots are to be used in a Voters Guide, the ballot must match the ballot face that will appear on the voting machine on Election Day. Your Board of Elections may be of assistance in providing an acceptable sample ballot if the actual ballot is not available by the Voters Guide deadline (and it almost never is).

- Following these guidelines helps to assure the public of the League's nonpartisanship and helps to reinforce the League's sense of fairness and its credibility in the local community.