
In League In Ohio

Practical Steps for Leading a Local League of Women Voters



In League In Ohio: Practical Steps for Running a Local League

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Based on “In League In Ohio: A Supplement to In League, LWVUS, for Ohio League Leaders”

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May 2006

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Part I: Introduction

The presidency of a League of Women Voters is a rewarding, important, and – yes – *big* job. It’s like the old Peace Corps slogan “the toughest job you’ll ever love!”

There are many wonderful resources available to remind you of the basics, keep you up to date, and provide helpful tips. Unfortunately, there is no way to combine everything you need – or might want – to know into one handy booklet.

In League In Ohio is designed to help you find what you want to know without reprinting everything that’s already available from other sources. *In League In Ohio* contains:

- information that the state League wants you to have (including reporting requirements, and what you can expect the state League to provide for use in your Voters Guide, information unique to Ohio);
- things that are important enough to read more than once (including League requirements, nonpartisan policy, tips for taking action);
- and tips on where to find more information (including examples of nonpartisan policies, lists of League positions, or descriptions of different leadership styles).

We hope you find *In League In Ohio* a manageable resource that will help you to maneuver more efficiently through a sometimes overwhelming number of wonderful and helpful publications, mailings, and web sites.

League presidency, in addition to its responsibilities, is also a tremendously enriching role. Don’t forget to step back from your list of *things to do*, and look at all you have *already accomplished!* On behalf of the state League Board, your members, and your community, thank you!

Many terrific resources are available on the state and national Leagues’ web sites.

You’ll want to bookmark:

www.lwvohio.org

and

www.lwv.org

Register on-line to gain access to members-only information on the LWWUS web site.

Tips from past presidents ... #1

I found that when I began to start board meetings on time – rather than waiting a few (or more) minutes for stragglers – the board members started to arrive on time.

Part II: Board Organization and Procedures

One of the most important roles of the League president is to run the board. That includes meeting the requirements for Leagues, setting priorities, and utilizing the board members.

Nonpartisan Policies

Nonpartisan policies should be reviewed, updated if necessary, and approved by the local board every year.

Find sample nonpartisan policies in *In League US*, which can be viewed or downloaded from the LWVUS web site www.lwv.org, in the *President's Packet* booklet that comes each year from LWVUS, and from the LWVO office in a bimonthly Presidential Update.

1. The Local League Board

Mission

The League of Women Voters, a nonpartisan political organization, encourages the informed and active participation of citizens in government and influences public policy through education and advocacy.

Requirements for Leagues

Delegates to national convention voted the following measurable and enforceable requirements to be fulfilled by Leagues in order to receive or maintain recognition:

- The League must have **bylaws**, the first three articles of which must be consistent with those of the LWV of the United States (LWVUS). The remaining articles must provide for democratic procedures.
- The League must establish and maintain a **nonpartisan policy**.
- The League must hold **annual business meetings** of the membership.
- The League must hold **regular board meetings**.
- The League must meet its **financial obligations** to the state and national levels of 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.

After careful consideration, the LWVO board has agreed to also require the following basic activities that lead to successful local Leagues. The League must:

- Conduct a community outreach activity (e.g., voter service, public meeting, recycling drive).
- Hold one or more membership meetings or activities a year on League program issues.
- Have membership sufficient to maintain League viability.
- Provide a newsletter or other written communication with its members on a regular basis.
- Adopt a budget with regard to its priorities.
- Have a membership chair/committee with the goal of increasing membership.

Guidelines

The League of Women Voters of Ohio (LWVO) is responsible for seeing that the health of its local Leagues is maintained. LWVO developed the following guidelines that local Leagues can keep in mind when setting priorities. They also can be used by a local League or the state League to determine how a local League is doing. Members of the LWVO board are trained and happy to assist local Leagues who have found areas needing improvement. So, in addition to fulfilling the requirements, a healthy local League:

- develops plans and evaluates activities
- has compiled a study of its community, and uses and updates it periodically
- carries out citizen education/voters service activities
- establishes positions on public policy through member participation and agreement
- sends representatives to regional, state, and national League meetings and to training opportunities
- encourages flexibility of its administrative structure
- submits reports to state and national as requested
- has an active nominating committee
- has high visibility in the community

Best practices in each of these areas can be found on the state League's web site **www.lwvohio.org**. Should a League want to improve its ability to meet the guidelines or requirements, help is available by calling the local League's liaison (see description on p. 7), the LWVO member service committee chair, or the state League office.

Developing Policies

A local League board sets policies about a number of concerns. Policies are essentially procedural guidelines expanding on the bylaws. Larger Leagues are likely to need more policies than smaller ones. In addition to a nonpartisan and a diversity policy, areas that might be covered include:

- uses and composition of an executive committee
- office management and personnel
- communications, for example, designation of the president as spokesperson for the League, guidelines for review of the *Voter* by the president, handling of membership lists

Diversity Policy

The LWV, in both its values and practices, affirms its belief and commitment to diversity and pluralism, which means there shall be no barriers to participation in any activity of the LWV on the basis of gender, race, creed, age, sexual orientation, national origin or disability.

The LWV recognizes that diverse perspectives are important and necessary for responsible and representative decision making. The LWV subscribes to the belief that diversity and pluralism are fundamental to the values it upholds and that this inclusiveness enhances the organization's ability to respond more effectively to changing conditions and needs.

The LWV affirms its commitment to reflecting the diversity of America in its board, staff, and programs.

Tips from past presidents ... #2

One good method for priority setting is to have each board member take five minutes to jot down five responses to “What do you want to happen in your League this year?” Follow this with brief discussion, and perhaps agreement to group certain similar responses together. Have each board member jot down the three items they consider most important and rank them 1–2–3, assigning a weight of 3 to the most important. The item with the most points “wins” and constitutes the highest priority of the group as a whole.

- financial policies
- determination of which candidates are to be included in Voters Guides or candidates’ nights (e.g., write-in candidates)
- conflict of interest (*In League US* has a sample policy).

Setting Priorities: Goals, Strategies, and Evaluation

No League can do everything. Each board is responsible for setting priorities and specific goals within each priority. Once priorities are set, your resources can be considered, and your energy and resources (people, time, and money) can be focused. Priorities can be set within each committee as well as for the League as a whole.

Perhaps you have decided you cannot address all the items on the LWVUS advocacy agenda, but have chosen one to pursue. Perhaps you have decided to do one local voters service activity in October or have decided to concentrate on membership this year.

Once priorities are set and specific goals determined, you can then generate imaginative, flexible, and even experimental strategies to accomplish your goals. Strategic planning will help the board identify the person or committee responsible for each step, the time frame, the expected cost and funding methods, and who else might help (organizations, coalitions, community members).

Periodic reviews of your progress and strategies will help keep you on target. Some things take longer than we expect – planned activities might not have the desired effect; situations change. By testing, reviewing, and reassessing you can keep moving toward your goal. You can analyze what you have done well and learn from past mistakes.

If something is really a priority, there will be time and people power to accomplish it. Conversely, if no one wants to work on a project, you need to accept that it is really not a priority of your group.

You still think it is priority? Then it’s time to evaluate what is *really* blocking you from accomplishing it.

Organizing Your Board

There are two effective ways to organize the local League board.

Portfolio System: In the traditional League, each board member “holds a portfolio.” This essentially means that each board member has responsibility for one basic League function. One person is in charge of voters service, another of membership, another of natural resources, etc. Vice presidents might hold some umbrella role such as program coordinator and coordinate the work of persons holding portfolios (i.e., social

policy, natural resources, and local studies). There might be a hierarchical chart of who reports to whom, but the board does not divide into separate committees. The board meets as a whole, and each member gives a report at every meeting.

Committee System: In recent years, many Leagues choose to use a committee system. In this system, the board initially sets priorities for the year and then divides into committees. Committee chairs may or may not be vice presidents, and some Leagues choose to include off-board members on these committees. Committees meet, plan strategies to achieve the priorities set by the board at the beginning of the year, bring plans to the board, and ask the board only for policy decisions. This should minimize board meeting time.

Examples of the committee systems, and the committees' responsibilities, can be found on line. Look for *In League US* in the member's section of www.lwv.org.

Board Meetings

Regular board meetings are extremely important, and well-run meetings encourage good attendance and participation. It is the president's responsibility to make an agenda for board meetings, distribute it to board members prior to the meeting, stick to the agenda, and adhere to simple parliamentary procedure. (Need a refresher on parliamentary procedure? LWVUS sells "Simplified Parliamentary Procedure: Based on Robert's Rules of Order" inexpensively. Attending state or national convention lets you experience the rules in action!)

Setting Expectations for Board Members

The president also leads the individuals who make up the board. As you know, it is helpful to know what is expected of you. Provide your board members, especially officers and committee chairs, with as clear as possible job description. General descriptions of officer positions are in the next chapters. In addition, there are many good board member management tools available on the national League web site. You may want to distribute copies of certain sections of *In League US*, including "Total Board Responsibility," and "Local League Board Member at a Glance."

Each board member should get a notebook from a predecessor. There may also be some more extensive files passed on, especially if to a committee chair. Every notebook should have:

- *In League US*
- *In League In Ohio*
- local board list, with committee assignments

The Role of the Board in Any Organization

Administration: constitutes and continues a legal entity; defines organization's purpose; determines policy

Planning and Budgeting: defines the needs to be met and target population to be served; establishes goals and objectives; develops realistic budget; plans program for the year; adopts budget annually

Evaluation of the Organization's Effectiveness: evaluates accomplishment of adopted plans, responsiveness to new situations, and the organization itself

Financial Stewardship: develops financial resources; sets conditions and standards for funds solicited in the organization's name; engages in long-range financial planning; protects fiduciary integrity through budget approval, regular financial reports and audits, appropriate policies and controls, and avoidance of conflicts of interest

Maintenance of a Community Connection: represents the public interest; represents the members' interests; represents the organization to the community

Tips from past presidents ... #3

All League presidents need an answering machine. And these days, we can't really do our jobs without an e-mail address and web access. If you don't have web access yourself, you can designate another board member to receive e-mail, but you'll miss out on a lot. I find the League e-mail groups that let me interact with other League presidents and members throughout the country to be especially helpful.

- membership list
- local, state, and national bylaws
- local board policies
- nonpartisan policy
- local League calendar for the year
- annual budget
- contact information, including web address, for LWVUS and LWVO
- local program, positions, and studies
- *Agenda for Action* (LWVO Program)
- *Impact on Issues* (LWVUS Program)

2. Role of the President

You are the spokesperson for your local League. You make or sign all statements, or you pre-approve any statements made by another Leaguer in the League's name. For example, your League may want to speak at a school board meeting. Your education specialist may present the League's position on the issue, but only after her statement has been approved by you. Other public pronouncements that the president should approve include letters to elected officials, letters to the editor, press releases, the local *Voter*, and your League's web site.

You have a good basic knowledge of what League is and how it functions, and you communicate this information to others. *In League US* and *In League In Ohio* are your most essential tools, giving procedures for almost anything. State board liaisons can help interpret anything that is unclear to you. *Agenda for Action* and *Impact on Issues* are the basics for content of state and national program. Along with your local program positions, these form the basis for any action taken by the League.

You are the liaison between your League and the state and national League boards, and you encourage your board and members to take a broad view of League work.

You are an organizer, facilitator, troubleshooter, a watchperson over the work of others. Delegation is vital. You must be willing to assume the responsibility of managing others as well as yourself. One of your major roles is to help develop the leadership skills of others and to motivate others to wish to become leaders in their turn.

You are a manager of:

- **Information:** You will receive information via e-mail, through the mail, and in person. Scan, prioritize, share, and file. (If you don't already know how, it's time to learn how to forward e-mail and download documents.)
- **Time:** Prioritize, keep a calendar (making sure not to conflict with announced LWVO or LWVUS activities), organize projects, follow up, and say "no" when appropriate.
- **People:** Delegate, motivate, facilitate, listen, and praise.

Resources Available from LWVO

Liaison: The liaison system provides each League with a contact person on the state board. The liaison knows your League by reading the minutes and *Voters* you send and through regular contacts with the president. The liaison also can provide updates on state League activities, information, assistance, and networking contacts.

Visits: Members of the state board are available to assist with conducting a board orientation or training, or to be a speaker at your annual meeting or other special event. The LWVO president may also be available to visit. Just contact your liaison or the state office with your request.

Communications: Regularly e-mailed Presidential Updates include materials helpful for tasks coming up on most League calendars. Voters service information on statewide issues and candidates is provided. An *Ohio Voter* is mailed to all members quarterly.

Publications: LWVO regularly publishes informational books for members and the general public, which can also be used for publicity and fund raising by your local League (e.g., *Know Your Ohio Government*). LWVO

also publishes items useful for basic League work (e.g., *New Member Handbook*), and board tools (e.g., this manual, *Agenda for Action*, *Voter Service Handbook for Ohio*).

Web Site: www.lwvohio.org has information useful to local board members, other League members, and the general public.

Statewide Meetings and Workshops: In addition to convention and council on alternate years, other training and networking opportunities are provided. Regional Meetings and Statehouse Days are commonly held. These are opportunities to learn, have fun, and be inspired.

Advocacy Agendas and Program Planning Materials: These help Leagues coordinate their efforts, plan local priorities, and influence statewide study and action.

LWVO Education Fund: This education arm of the LWVO enables the state League to accept large contributions for special projects, reducing the financial burden on members while increasing the League's visibility. In addition it administers local League accounts, enabling Leagues to accept tax-deductible contributions.

Local League President's Roles, Responsibilities & Opportunities

This chart represents a list of basic expectations for local League presidents as well as possibilities for growing your League. It is organized according to function and categorized by level of responsibility (local, state, or national League). Presidents are encouraged to delegate tasks to board members, committees, and volunteers as much as possible.

	National	State
Leadership	<ul style="list-style-type: none"> • Serve as a local voice for national issues, or, if appropriate, refer to LWVO/ LWVUS. • Assist national nominating committee by recommending members for national board. 	<ul style="list-style-type: none"> • Serve as a local voice for state issues, or, if appropriate, refer to LWVO. • Prepare an annual report (using form provided by LWVO). • Communicate with the LWVO board liaison and assure that minutes and newsletters are sent. • Assist LWVO nominating committee by recommending members for LWVO board.
Voters Service	<ul style="list-style-type: none"> • Take advantage of national partnerships (e.g., National Association of Broadcasters, National Student-Parent Mock Elections) to expand local voter service and establish contacts. • Utilize LWVUS election materials (e.g. "How to Watch a Debate," <i>Choosing the President</i>). 	<ul style="list-style-type: none"> • Distribute voters guide questions prepared by LWVO to regional candidates (U.S. rep, state senator, state rep, etc.), in consultation with other affected Leagues. • Print material supplied by LWVO for statewide candidates (US senator, governor, etc.) and ballot issues in local voter guides. • Coordinate on-line candidate information with state office.
Program & Action	<ul style="list-style-type: none"> • Participate in program planning (even-numbered years) and study/consensus process, and attend LWVUS Convention. • Respond officially to Action Alerts. • Use national positions to act locally (in consultation with other affected Leagues). 	<ul style="list-style-type: none"> • Participate in program planning (odd-numbered years) and study/consensus process, and attend LWVO convention. • Respond officially to Action Alerts. • Conduct legislative interviews using questions supplied by LWVO. • Use state positions to act locally (in consultation with other affected Leagues).
Membership	<ul style="list-style-type: none"> • Ensure that all Nationally Recruited Members (NRMs, or members who joined at the national level and don't belong to a local League) in your area receive local mailings; attempt to recruit them to join your local League. 	<ul style="list-style-type: none"> • Ensure that all state Members-At-Large (MALs, or members who joined at the state level and don't belong to a local League) in your area receive local mailings; attempt to recruit them to join your local League.
Financial Management & Fund Raising	<ul style="list-style-type: none"> • Pay national PMP, and budget for periodic increases. • Budget funds to send delegate(s) to national convention (even-numbered years). 	<ul style="list-style-type: none"> • Pay state PMP, and budget for periodic increases. • Budget funds to send delegate(s) to state Convention (odd-numbered years) or state Council (even-numbered years). • Assist LWVO in meeting its budget by coordinating Phonathon and promoting Women's Equality Day (August 26).

Local

- Secure a successor to take over when your term is over.
- Hold regular board meetings, ensuring that tasks are delegated to committees with clear expectations; ensure that committees have tools to succeed.
- Keep good records. Ensure that meeting minutes, a membership database, correspondence, records of voter service and action, and financial records are maintained in an orderly fashion and passed on to your successor.
- Revisit nonpartisan policy.

-
- Register voters and get out the vote.
 - Develop and distribute Voters Guide questions for local elections (in consultation with other affected Leagues). Produce a primary and a general election Voters Guide.
 - Organize and promote candidate debates/meetings.
 - Study local issues selected by members, and publish results.

-
- Review local program and update as appropriate.
 - Take action on local issues as appropriate.
 - Promote local action to media and the public, using action (rather than voter service) as a method for recruiting new members.
 - Ensure that local study consensus process follows League principles.

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- Submit approved rosters of current membership to state and national offices in January, and update on-line membership database at least once a month.
 - Hold an annual meeting of your membership.
 - Develop a membership plan that seeks to recruit new and diverse members and retain existing members.
 - Publish a local *Voter* newsletter.

-
- Develop budget for approval at annual meeting.
 - Ensure that all revenues and expenditures are properly documented and recorded.
 - Develop fund raising strategies for members and nonmembers (special events, grants, corporate sponsorships, planned giving).
 - Use local or state-managed 501 (c)(3) education fund to accept tax-deductible contributions and to save on sales tax when paying vendors.
-

The LWVUS web site has many sources of information on leadership styles, strategies for time management, project organization, and more. The state League also provides leadership training at state meetings (convention, president's training). In addition, LWVO board members are available to come to your League to provide board training.

Another good (though non-League) source of information is Board Café, an electronic newsletter for members of non-profit boards. "Short enough to read over a cup of coffee," its web site states, "Board Café offers a menu of ideas, information, opinion, news, and resources to help board members give and get the most out of board service." Check it out at <http://www.compasspoint.org/boardcafe/index.php>.

Co-Presidents

Most past and current co-presidents report that, while not ideal, co-presidency is one way to ensure League leadership when no one person is able to take on the job. If your League has co-presidents, try to:

- Find co-presidents with different strengths and compatible personalities.
- Explicitly divide areas of responsibility as early as possible.
- Decide ahead of time what types of decisions need to have the approval of both co-presidents.
- Work together to develop board agendas.
- Keep in regular communication with each other.

One League has found using a steering committee of past presidents to be extremely helpful. The committee helps to keep the big picture in focus, alert the co-presidents to details that might fall through the cracks, and pitch in and help when they can.

Keeping Local League Files Current

Some Leagues archive their important papers at a library or historical society. Be sure to keep:

Recognition file (materials relating to provisional status and official recognition of local League): Permanent president's file.

Bylaws: Maintain a copy of each revision permanently in president's file for historical purposes.

Annual Meeting Minutes: Keep two years in active file; then to president's file.

Minutes: Keep two years in active file; then file in permanent president's file.

Roster of officers: Keep three years; then to president's file.

Program List: Keep three years; then to president's file.

Voters Guide: Keep four years (an election cycle); then discard unless it has historical value.

Local Voters: Keep one year in active file; then file one copy of each in permanent president's file.

Web Page: Keep hard copy for four years; then discard unless it has historical value.

Annual Reports to LWVO: Keep two years; then discard.

Correspondence: Keep two years (either on paper or electronically); then discard, unless it has historical value.

Most LWVO and LWVUS material (printed and electronic) can be discarded after two years. Keep only that information useful for smooth operation of your League. "How to" publications and information sheets should be kept in the president's file and in appropriate board committee files.

Institute and follow through with a computer backup plan.

3. Role of the Officers

Vice President

The board vice president presides in the absence of the president at board, unit, general, or annual meeting. The designation of first, second, or third vice president determines the order of succession. In addition, vice presidents:

- Attend assigned committee meetings.
- Function as a committee member. (The vice president may or may not be chair of a committee.)
- Help the president with organizational aspects of League; help identify what needs to be done and organize to do it.

Secretary

The secretary is vital to the functioning of the League. This person records the plans, proposals, decisions, and the undertakings of the local board and the local League. The entire organization profits from minutes that are accurate, clear, and concise. (See *In League US* for sample minutes. Also look over minutes from a few past secretaries to get good ideas.)

League minutes are more than the factual record of motions made, they record the pros and cons of any discussion and the intent and action of the group. The secretary is an important link in the League's system of communications. The minutes remind board members of decisions reached and the reasons why, inform absent board members, and keep the LWVO board in touch with your local League.

Board meeting minutes should be provided to each board member in advance of the next board meeting. Annual meeting minutes are often reviewed by a committee of people who attended the annual meeting, then they are made available and approved at the next year's annual meeting.

Membership VP or Committee Chair

In addition to implementing a membership plan, a membership vice president manages records:

- Keep the master file of membership and update it regularly. Update the on-line member database.
- Coordinate the treasurer's membership list with membership committee's list.
- Send membership count to national and state offices by the deadline.
- Collect dues and pass checks to the treasurer (or office).
- Prepare regular membership reports for the board.

The secretary may also act as a parliamentary aide to the president: assisting the president by counting votes, assuring the president of a quorum, knowing the status of motions, and reminding the board of bylaws and deadlines.

Some tasks performed by secretaries of smaller Leagues are generally completed by the staff of larger Leagues, including:

- Typing the meeting minutes and sending/e-mailing them to local League board members, the state office, and state board liaison.
- Completing and submitting the board list form and annual report form requested by the state League every year.
- Sending to state and national offices and your state board liaison your League's budget, bylaws (if changed), the exact wordings of the local program as adopted at the annual meeting, and approved annual meeting minutes.

Treasurer

The treasurer has two main roles – keeping track of the League's money and budget, and reporting to the board and membership about them. To keep track of funds:

- Read the financial administration section on the LWWUS web site.
- Register treasurer's signature at the bank(s) that carries the League accounts. (The president should sign as well.)
- Consider being bonded. The larger the budget, the wiser this is.
- Deposit checks (including dues) and pay bills (including PMP) promptly.
- Keep an accurate record of all income and expenditures – for every check issued there must be an approved bill or voucher.
- Advise the board about cash flow.
- Remind board to appoint an audit committee at the end of the League fiscal year.
- Serve as an active member of the budget committee and the fund raising or finance committee.

The treasurer is responsible for making periodic reports to the Board. A monthly report should have, at least, a summary of income, expenses, and cash on hand for the month, as well as upcoming large payments and anticipated receipts.

In addition, the treasurer should provide the board a quarterly budget comparison. A budget comparison shows the budget accepted at annual

Tips from past presidents ... #4

If you try to do all the work of the League, not only will you burn yourself out, but you will lose an opportunity to develop your membership. Hands-on involvement is the difference between "members" and "active members." Active members have more of a personal stake in the League; they feel like they are part of a team that is making a difference; and they become future leaders. Who would want to lose out on all that?

Tips from past presidents ... #5

It's so important to take some time to get organized. Over the summer, I like to sit out in the back yard and make a rough calendar for the year. If I have a project with a clear deadline, like annual meeting, I work backwards and figure out when each step along the way should be completed and, therefore, started. (Does it have to be approved by the board? They'll need to have it ahead of time; that means it must be ready by ... So we'd better get started on that by ...) That gives me a little grounding when things get hectic later in the year.

meeting, income and expenses to date for each budget item, and the year-to-date totals.

Also, before the annual meeting, the treasurer provides an annual report to the membership. This contains the budget passed at the last annual meeting, actual income and expenditures for the year-to-date for each budget item, and the proposed new budget.

The proposed new budget is devised by a budget committee, appointed by the League president in accordance with the bylaws. The recommended budget is adopted by the board and then passed by the membership at annual meeting.

The treasurer is also responsible for a number of legal requirements:

1. Employer Identification Number (EIN).
 - a. The IRS recommends that all nonprofit organizations have an EIN. If your League does not have one, ask the IRS for form #SS4, and use it to apply for one.
 - b. Each year your EIN must be sent to LWVO treasurer on a form supplied by LWVO so that LWVO can fulfill its filing requirements for the IRS.
 - c. If your League has paid staff, you are required to pay FICA and employer taxes.
2. Tax Requirements
 - a. Leagues with incomes of over \$25,000 must file form #990 with IRS by the 15th day of the 5th month after the end of the fiscal year. This is required of all nonprofit organizations and is informational only.
 - b. Leagues with their own Education Fund (EF), with EF income of more than \$5000 or EF assets of more than \$15,000, must also file reports with the Attorney General of Ohio. To learn more about the rules, check out the publication about charitable foundations on the Attorney General's web site at: http://www.ag.state.oh.us/business/forms/char/ann_fin_rpt_char_org.pdf. The reporting form is also on the AG's web site at: http://www.ag.state.oh.us/business/forms/char/ann_fin_rpt_char_org.pdf.
 - c. State sales tax forms are filed semiannually. Contact your county government office about any sales tax filing requirements.
3. Campaign Finance Reporting Requirements:
 - a. Reports must be filed if your League made an expenditure or received a contribution to support or oppose a ballot issue. (Producing yard signs is a reportable expense. Notifying League

members by mail of our position does not require a report.)

b. Contact your Board of Elections for the appropriate forms.

Good documentation of the treasurer's work is essential. It protects the organization and the treasurer. The treasurer should keep the following files:

1. Ledger
2. Cash receipts records
3. Cash disbursement records
4. Past quarterly and yearly reports
5. All forms required by government bodies
6. Copies of insurance policies, bonding agreements
7. A Treasurer's Permanent Summary File Sheet (see sample). Keep in treasurer's file and also give a copy to president and secretary.

Items which can be discarded are bills and vouchers (after three or four years) and checks and bank records (after seven years).

S A M P L E

LWV TREASURER'S PERMANENT SUMMARY FILE SHEET (General or Education Fund)

Date of incorporation _____

Employer Identification Number _____

Confirmation of request for EIN (date) _____

Status assigned by IRS _____

Ohio sales tax number, filing dates _____

Accounts and Investments

Institution Name | Address | Account Number | Type | Date Acqu. | Date Exp.

Part 3: League Activities

Providing voter service, conducting studies, engaging in advocacy, attracting and retaining members, funding the League, communicating with members and the public, and holding membership meetings are activities undertaken by all healthy Leagues.

Tips from past presidents ... #6

It's a very good idea to review and adopt your policies for inclusion in the Voters Guide or invitation to a candidate forum or debate. Questions like "Should we include write-in candidates?" or "What do we do if not all the candidates for an office will participate?" are better discussed and decided on *before* they become an issue.

1. Voters Service and Citizen Education

Part of the mission of the League is to "encourage the informed and active participation of citizens in government." Traditionally, the League of Women Voters has acted on this by providing services to voters at election times.

Each board should carefully assess, at each election, the needs of the public along with the time and financial resources available to meet those needs. Design a voters service campaign that balances these factors.

Remember to clearly separate all advocacy/action you take as a League from voters service activities. While the League never supports or opposes candidates or political parties, it can take a position on a ballot issue. Therefore, if your League supports or opposes any ballot issue, be certain that it is not mentioned in any voters service material or forum.

Over the years, the League has become known for its expertise and fairness in basic voters service activities.

Voters Guides

Many Leagues publish a Voters Guide, containing basic information about local, state, and national offices, including duties, salaries, qualifications, and a verbatim listing of candidates' answers to questions posed by the League. The guide might also include basic election day information: hours the polls are open, absentee ballot information, voting hotline numbers, etc. Many Leagues are also publishing their Voters Guides on their web sites.

The state League will provide the answers to questionnaires for candidates for statewide office (governor, Lt. governor, secretary of state, auditor, attorney general, treasurer, Ohio supreme court justices, U.S. senator) for you to print in your Voters Guide. The state League will also recommended questions to be asked of U.S. house, Ohio house, Ohio senate, court of appeals, and Ohio board of education candidates. When an elected official's district covers more than one League territory, LWVO will choose one League to contact the candidates for that office and to share the information received with the other Leagues in the district. In addition, the state League also provides explanations and pros and cons for state ballot issues.

The national League does not provide information on U.S. presidential candidates to publish in a Voters Guide. However, LWVUS will continue to pursue opportunities to use technology to make candidate information more readily available to citizens.

Candidates Nights

Candidates nights are traditionally an opportunity for candidates for several different offices to present short individual speeches and then answer questions from an audience. This is a good opportunity for the League to work in coalition with other organizations. Cosponsorship can increase attendance. But be sure the format and rules don't conflict with your League's nonpartisan and candidate forum policies.

Debates

Debates are more formal, usually involving candidates for only one office, a moderator, and a panel of questioners. Sometimes League debates will be broadcast on radio or TV. Podcasts and public access cable are other avenues of distribution. For comprehensive information on holding debates, see "Face to Face: A Guide to Candidate Debates" on the LWVUS web site, and "Guidelines for State and Local League Debates Including 'Empty Chair' Debates," on the LWVO web site.

Encouragement of Voting

Voter registration drives and get out the vote campaigns are typical League activities. It is important to be up-to-date on policies including absentee or early voting, where to vote if you've moved but haven't re-registered, how to operate new voting machines, how to write-in a candidate's name, etc. The key is to plan voters service activities of all kinds that make the voter ready and able to vote.

Ballot Issues and Levies

Leagues perform a great service by developing clear explanations, and pros and cons, of key ballot issues and levies.

Poll Watching

Activities to open up the election system might include checking the accessibility of polling places, how helpful poll workers are, whether counting is done properly, etc. Leagues can help broadcast networks gather information on the results of an election.

The Voter Service Handbook for Ohio is a great resource for understanding and managing voter service activities.

Year-Round Citizen Education

Citizen education is not confined to elections. Throughout the year, activities could include:

- Opportunities for members and public to meet newly elected officials.

Judicial Candidates

In Ohio, judges are elected. Even though judges run for office, they are different from other candidates, and voters must respect that. Specifically, judges are not elected to represent the views of the people who vote for them.

Under state rules, judicial candidates may not make promises regarding how they will rule on controversial issues such as abortion or the death penalty because, if they did, they might appear to be biased toward a particular viewpoint. Most candidates refuse to discuss their opinions on such issues or – to be on the safe side – nearly any other issue. In the past, Leagues felt very constrained in the questions they could ask judicial candidates, and voters had little information on which to make a choice.

In 2004, LWVOEF undertook a project on judicial independence. Among other findings, the League found that while judicial candidates cannot talk about specific issues, they can answer questions about their knowledge, judicial philosophy, effectiveness, character and experience.

Examples of questions that a candidate may answer can be found on the LWVO web site.

Important Reminders

- Never mix action and voters service. Even if League has a position on an issue, this cannot be mentioned in voters service publications or at voter service events, which are typically paid for with Ed Fund monies.
- Candidate or issue advertising should not occur in the Voters Guide or near it in newspapers. Campaign literature (including t-shirts) should be kept out of the room where a debate or forum is taking place, although they may be displayed at a designated location elsewhere in the building.
- Cooperate with Leagues who share your legislative districts.
- The League's rules and editorial control must be maintained if other groups work with the League.

Lunches, parties, and forums are possible formats.

- Encouraging political participation, including teaching practical political skills, publishing deadlines and qualifications for office to encourage people to run for office, and teaching citizens how to lobby.
- Hot issue forums. When a hot issue arises, and the League has no position with which to take action, a League-run informational community forum can serve an important function. League procedures learned from debates and candidates nights can often defuse potentially disruptive situations. See "Citizens Building Communities: The ABCs of Public Dialogue" from LWVUS.
- Observer Corps. This is a group of members who attend various government meetings to observe and pass along what they have learned. This can be used to discover need for action, need for a new study, or need to alert the public about important issues. One League published its reports regularly as a fund raiser.
- "Know Your Community" booklets can be written. (See the *President's Packet* from LWVUS for details.) They help educate your own members, are great resources for the public, and may be used as fund raisers.

In League US and the LWVUS and LWVO web sites have more information.

2. Program: Conducting Studies

Program is the League's reason for being, the basis for both education and action efforts. In League lingo, "program" does not mean "the topic for the meeting." League program consists of those governmental issues that League members choose for concerted study and action.

The League's process for study has a solid reputation of in-depth and unbiased research and member consensus on the resulting League positions. It isn't fast, but it's solid.

Local Leagues should seriously consider conducting a local study. Properly conducted and publicized, studies have enormous potential to increase membership, visibility, and support while performing an important service to the community.

The study process is an important function of the League. It involves the entire membership, guided and informed in an unbiased manner by the study committee. The board, through the program vice president or study committee liaison, monitors all study activities to ensure the League principles are followed.

The Study Process

The process is the same for all League program: national, state, and local. Here are the major steps and who is responsible for them:

1. **Members** consider various issues for possible study at the program planning meeting early in the year. They choose an issue or issues for local study and write the focus and scope.
2. The **League board** evaluates the results of program planning and makes recommendations for proposed new studies. It alerts the members, usually through the *Voter*, to the proposed program items up for a vote at annual meeting.
3. **Members** adopt issue(s) for study at annual meeting.
4. The **board** finds a local study chairperson.
5. The **board** works with the **study chairperson** to recruit members for the study committee. The **board** decides if the study committee can recruit nonmembers.
6. The **study committee** studies the issue in depth and without bias while educating the membership through *Voter* articles, discussion meetings, presentations by experts, etc.
7. The **board** determines the method of member agreement to be used (i.e., consensus, concurrence).
8. The **study committee** prepares a written report and develops consensus/concurrence questions; both of which are approved by the **board** before they are sent to the membership in advance of the consensus/concurrence meeting.
9. The **study committee** develops the meeting discussion plan and briefs discussion leaders and resource people on conducting a successful meeting.
10. **Members** meet to discuss issues and answer questions in an attempt to come to agreement.
11. The **study committee** prepares a report on the results of concurrence/consensus meeting(s) and drafts a position statement.
12. The **board** reviews and approves results of agreement discussions and adopts position statement.
13. The **board** is now ready for action on the study issue.
14. **Members** reaffirm all local positions, including new one, at annual meeting.

League Principles

The League of Women Voters believes:

- in representative government and in the individual liberties established in the Constitution of the United States.
- 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.
- every citizen should be protected in the right to vote; every person should have access to free public education that provides equal opportunity for all; and no person or group should suffer legal, economic, or administrative discrimination.
- efficient and economical government requires competent personnel, the clear assignment of responsibility, adequate financing, and coordination among the different agencies and levels of government.
- responsible government should be responsive to the will of the people; and 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 that affect the general welfare, promote a sound economy, and adopt domestic policies that facilitate the solution of international problems.
- cooperation with other nations is essential in the search for solutions to world problems, and the development of international organization and international law is imperative in the promotion of world peace.

What is Program Planning?

In many organizations, the board determines the organization's positions on issues. In the League, the members determine the positions through study and agreement.

Like consensus taking, program planning is another example of the grassroots heart of the League. Program planning is the opportunity for every member to recommend which existing League positions should be kept and which should be dropped. It is also the opportunity for members to recommend areas for new study.

Program planning happens at all three levels of League: in even-numbered years for national positions and in odd-numbered years for state positions. Most local Leagues conduct program planning annually.

Program planning marks the end of the line for positions that are out of date or on which member agreement is no longer clear. It also is the first step in the road from study to action.

For detailed information on every step of the study process, see the LWVO publication "From Study to Action."

Proposed new studies must be carefully worded with the focus (problem to be addressed) clearly identified and the scope clearly indicated. The wording of the **focus** should be concise, direct, and specific, for example: "Evaluation of administration and financing of mental health service in Hometown" rather than "Study of mental health." The wording should also be general enough to allow flexibility as the study proceeds. For example, avoid: "Evaluation of the adequacy of the current organizational chart for administrators in relation to the number of staff and clients with consideration of change to a separate administrator for each program." Avoid negative wording or implied conclusions. For example, avoid: "A study of the inefficiency in the Mental Health Center administration."

The **scope** is an additional statement explaining in more detail the limits of the study, possible areas for explanation, and sometimes the priority of a particular aspect. For example: "Focus: A study of the feasibility of recycling in Hometown. Scope: Study the range of possible methods of recycling waste products, with particular attention to paper and to public collection methods."

In evaluating the new studies proposed through the program planning process, the board should review proposals using the following essential criteria:

1. The issue must be one that can be solved by government action.
2. The issue can be addressed by the government(s) included in the basis of organization of your League. For example, if the issue must be addressed at the county level, your League must be a county League or must study the issue together with all Leagues in your county. If the issue must be addressed at the state level, since your League cannot act at the state level, you must lobby other Leagues in the state in order to get the issue included on state program.
3. The issue must fall within the principles of the League of Women Voters of the United States.

Additional criteria to consider before taking on new studies include:

1. Is this issue **politically relevant**? Does it need government action? Will it have long term impact? Will there be member and community support and interest?
2. Can the League **be effective** on this issue? Is there a unique role for the

League? Can the League be visible on this issue?

3. Is this issue **timely**? Is the issue moving in the political arena? Are there opportunities for League advocacy and/or education?
4. Is this a **manageable** issue for the League? Are there sufficient members and resources to make a difference? Is the member interest strong enough to sustain League activity? Are there potential allies for coalitions in the community?

Methods of Member Agreement

Consensus

This is the traditional and preferred League process. It involves arriving at substantial agreement among the members after study of facts. It is not the will of the majority, nor is it a poll or vote of the members. Consensus does not require unanimity.

Typically this method involves informed free discussion addressing critical questions raised by the study, considering all points of view and considering consequences of any decision, both apparent and hidden. When the participating members can come to basic agreement and feel commitment on the question, this is consensus.

This is the preferred agreement method because members not involved in the study committee may be able to add new information and new perspectives. Also the whole is greater than the sum of its parts. Thus, the wisdom of the discussion group is often more profound than could be obtained by a simple tally of member opinions.

Written Tallies

If circumstances warrant, opinions may be gathered by taking tallies either at a meeting or by asking members to respond to questions mailed to them. Even here, substantial agreement – not just simple majority – is required.

Concurrence

This is a method in which members are asked to approve or disapprove of a position statement proposed by the board. Often this will be a request to concur (or agree) with a position arrived at by some other League which has studied the issue or with a statement compiled by the study committee or the board. Background materials will be shared.

Tips from past presidents ... #7

Take a deep breath . . .

Position Statements

A position statement is a commitment to act, the goal of every study adopted by the League. Its wording forms the basis for any action to be taken. The study committee drafts a position statement, based on member agreement. The board approves it.

The statement is derived from consensus/concurrence reports and states the intent and point of view of the members. It does not go beyond what was covered and agreed upon. The wording should be broad enough to enable the League, over a period of time, to initiate, support, or oppose a variety of legislative and/or executive proposals. Use LWVO and LWVUS position statements as examples.

The League board may immediately act on the new position. You do not need to wait until a vote on the program at annual meeting. Among the first actions the board should take are to publicize the position statement to the members, and to announce – through a press release and/or on the League’s web site – the new position and how it was determined.

3. Program: Action and Advocacy

Political action is really the League’s reason for being. We were formed out of one of the largest and longest action campaigns this country has ever witnessed – the fight for women’s suffrage. Many of League’s concerns take long-term dedication. The battles for civil rights, educational opportunities, and environmental protection keep reemerging in new ways over many generations.

Aside from the immediate practical consequences of getting a specific piece of legislation passed, taking action has added benefits for the League. Leagues become stimulated, more vital organizations, as they take action. Credibility is established as legislators and others see League’s careful preparation and reasonable approach. Even if they don’t agree today, they may come to respect us and look for our input tomorrow. Members learn more about how to approach leaders, and Leagues become more effective as they continue to take action.

Determining When to Take Action

Action by the local League at the local level always needs support of the local board, whether working under local, state, or national positions. Local Leagues wishing to lobby state or federal officials need to coordinate their efforts with LWVO or LWVUS. (To work through the many different combinations of level-of-position and level-of-government in

determining how to take action, check out the publication “Taking Action” from LWVO.)

Local boards should use the following guidelines when deciding whether to take action on a specific issue:

- Leagues act only when they have a written local, state, or national position or are acting under LWVUS principles. During the study process, no action may be taken.
- Leagues may never take action in opposition to a League position. The League speaks with one voice once a position is reached, and the minority abides by this decision. Leagues may, of course, decline to take action.
- Leagues must separate voters service and action. These activities have different purposes and traditions. Tax laws also require that Education Fund money be used only for education, not action.

No League can possibly be active on all League positions at once. To focus your League’s efforts, consider:

- Is this issue a top priority for our League?
- Is the timing right? Is the political climate ripe because of government and/or citizen interest? Are League members knowledgeable, supportive of the position, and willing to help? Are other credible groups likely to be willing to join forces? Is there an urgent need?
- Is our input likely to have a substantial effect?
- Does our impact matter even if immediate success is unlikely?
- Can League credibility and influence be enhanced by our action?
- Do we have the time and money to meet our goals?

Sometimes there is no relevant position, or members are sincerely divided, or an issue threatens to turn into an emotional, divisive community battle. In those instances, citizen education may be more appropriate.

Action must be coordinated so that League speaks with one voice. Local positions may not be in conflict with state and national positions. In case of conflict, national and state positions take precedence over local League positions. The state League encourages consultation whenever there is any ambiguity in action options. Local Leagues should contact the state office for clarification. This provides an opportunity for communication in both directions about the possibilities for action and about the most appropriate techniques.

When local League boards determine action to take *locally* – even

Tips from past presidents ... #8

I’ve always liked the quote from Alexander Wolcott: “I am tired of hearing that democracy doesn’t work – it isn’t supposed to work. We are supposed to work *it*.”

Tips from past presidents ... #9

The national League-sponsored e-mail lists are a great way to involve our members (even those who don't want to or can't come to meetings). It wasn't that long ago that you had to be where the politicians were to really be an active lobbyist. Members didn't receive legislative updates more than once a month, and by then, the news was often old. Now any member can sign up for the Grassroots Lobby Corps or for e-mail lists on important issues, and they can get the latest information. It also helps our volunteer lobbyists in DC, because they have access to our members' expertise.

using state or national positions – no consultation with LWVO or LWVUS is necessary. When local Leagues wish to lobby state or federal elected officials – even, for example, the U.S. representative from your League's area – the local League must coordinate efforts with the LWVO or LWVUS so that we're all “on the same page.”

LWVO and LWVUS encourage action by local League boards and individual members on specific state and national issues. Local constituents' voices are highly valued by legislators. When Action Alerts are issued, the state and national Leagues rely on local Leagues and members to get the message out. The state and national Leagues need local League participation in state and federal action efforts. At the same time, our volunteer lobbyists are busy in Columbus and Washington, DC, representing local League members and supporting their efforts. The LWVO, specifically:

- determines an Advocacy Agenda every year, to focus League efforts within the state on a manageable number of issues,
- boasts an effective and respected volunteer lobby corps who follow the day-to-day and behind-the-scenes action at the Statehouse,
- publishes books and pamphlets to aid in taking action, including *Agenda for Action* (all LWVO position statements), “Taking Action” (a guide for how to use League positions at all levels of government), “There Oughta Be a Law” (lobbying tips along with details on how a bill becomes a law in Ohio),
- issues Action Alerts when local action is critical,
- updates members on the status of legislation the LWVO is following through the *Ohio Voter* and e-mailed Legislative Updates,
- strengthens League efforts by working in coalition with like-minded organizations,
- trains League members in effective advocacy techniques at statehouse day and convention,
- prepares campaign material for state ballot issues the LWVO is supporting or opposing,
- provides sample letters to officials, letters to the editor, speeches, talking points, etc. on key issues.

Members can also support advocacy efforts through background research. **Observers corps** observe local government boards, commissioners, city councils, etc. They do not take action on their own, but report to the board and membership on current developments relating to program

priorities. Completing the **legislative interviews** requested by LWVO gives our volunteer lobbyists in Columbus information they can use when working with members of the legislature.

Action Strategies

General

- Know where the power is.
- Know the people you wish to influence.
- Know the League and its positions.
- Know the issue. Be armed with good solid information.
- Know the opposition.
- Know your allies, and line up their support.
- Be businesslike and respectful of the rights of others.
- Follow up. Thank your supporters, let non-supporters know you noticed.

Letters and E-mail

- A courteous, brief, to-the-point letter will be given attention. Original messages, not copies of letters or e-mails composed by others, get more attention.
- Send an official letter from the president, perhaps co-signed by an informed member.
- Encourage personal letters from members, at the direction of the board. **Because the president is the only official spokesperson, letters ought not to mention the League.**

Personal Contacts

- Some officials are easily reached by phone. With others, setting an appointment to meet in person will be effective. Plan your agenda. Go in pairs if possible.
- Testimony and official statements should be typed and copied for the members of the group to whom you are speaking, as well as for the media. Look on the LWVO web site for examples of testimony.
- When League wants to examine how some law is working out in practice, League members may monitor how the law is being administered. To gather information, members may attend meetings, visit

Tips from past presidents ... #10

Legislators rely on their aides, so treat a meeting with an aide as seriously – and respectfully – as you would a meeting with the legislator herself. Legislative aides are also likely to have more time to spend with you.

Levies and other ballot issues

Some Leagues have felt pressure to take a stand on important local levies and other local issues. The same principles apply to these as to any action. It is particularly important to be sure that the League has done a previous study and has a relevant position. It is important to research the exact conditions leading to this particular levy request. No matter how much respect League has for the agency requesting funds, we owe it to the public and ourselves to review budgets, attend board meetings, understand any opposition, and gather other needed information.

agencies, and gather data from interviews with people. Reports of monitoring projects may be issued to the public as well as to the appropriate officials.

- Sometimes members can aid in drafting bills. The League might lead the way in proposing legislation or assist appropriate legislative or administrative committees in the wording of a law or regulation they are considering.

Reaching the Public (and officials too)

- Letters to the editor or editorial columns, signed by the president
- Personal letters (not mentioning the League) from members, at the direction of the board
- Information on your web site (*not* a voter service part of the site)
- Newspaper advertisements
- Circulation of petitions
- Rallies and demonstrations
- Speakers bureaus
- Radio talk shows
- Blogs

Working with Coalitions

Join with other local groups in order to share information, plan, coordinate strategies, and maximize resources. Before joining, consider:

- Who are their members? Are we comfortable with such characteristics as their history, action methods, funding, nonpartisanship?
- Would working with them meet our goals? Is this item a priority for us? Can League accomplish more with them than without them?
- What is League required to provide? Money, time, expertise?
- How will the coalition organize its work? Will League have adequate input in decision making?

The League has not chosen easy goals, and our stands often pit us against formidable foes. However, the variety of the League program means that adversaries on some issues are allies on others. Such is the fascination of political action. This, then, is how a multi-issue, multi-level, informed-citizen organization participates in government – year after year, always with many irons in many fires.

4. Membership

How many times have you heard this: “Oh, no thank you. We have enough members already”?

Didn’t think so.

More members mean more workers to carry out our important mission; more money; more power when we lobby. They bring new ideas; they move us out of ruts; they become new leaders. They help stave off burnout; they keep the organization alive; they become our friends.

Proven Recruitment Techniques

- Ask people personally.
- Ask people personally.
- Ask people personally.
- Bring a new or prospective member with you to meetings – not just the first time but several meetings in succession. (People are generally shy.)
- Think about why you joined – offer that to others. Think about why you stayed – offer that to others. Think about what a particular prospective member needs and wants – offer that.
- Publicity for League, public service announcements, letters, and coffees are helpful tools. They help create an atmosphere in which your personal appeal is more likely to work.
- Work with other organizations – to sponsor a candidates night or to support a school levy – especially with organizations whose membership is different from yours. Open up your study committees to non-members. Then ask these people to join.
- Offer incentives, if your budget and bylaws permit. Perhaps a student membership, or a three-month trial membership.
- Have your board carry membership materials with them.
- Don’t decide for someone else whether they are too busy or too “whatever” to join. Just ask, and let that person make his own decision.

For more membership recruitment ideas, see “Member News & Views,” the Diversity Toolkit, and *In League US*, which also has statistics and survey results about why people join. Attend state and national meetings and trainings.

Tips from past presidents ... #11

I still use a technique I learned at a League workshop years ago. It gave me a way to talk about the League – or any organization – engagingly but succinctly. Just spend a few minutes preparing three sentences: 1) the mission of the organization, in your own words; 2) a statistic about it; and 3) some way the organization has touched your life.

For New Members

LWVO and LWVUS have many materials and products (bumper stickers, pins, etc.) available. Check the web sites for the latest items. At the same time, don't be tempted to overdo materials. It's better to have someone ask for more information than to overwhelm someone with too much.

Involve New Members

1. Develop new member kits. These might contain:
 - A welcome letter from the president
 - *New Member Handbook* from LWVO
 - The latest edition of the *Voter*
 - Local, state, and national program in summary form
 - A League publication or two, perhaps on a topic that is a priority this year
 - A questionnaire about the member's interests. (Be sure that the completed questionnaire gets to a board member who can help match those interests with an activity.)
 - Membership and board lists
2. Hold orientation sessions where new members can socialize with current leaders and learn more about League.
3. Offer to take them to meetings and introduce them to other members.
4. Offer them specific opportunities to participate. Avoid squashing enthusiasm, even if it seems misdirected at first.

Utilize Active Members

- 1 Ask each active member to do something, since **involvement and personal satisfaction are the keys to retention**. Use the database to match tasks to interests.
- 2 Make sure the job you are asking someone to do is:
 - well defined and manageable
 - explained as important for specific reasons
 - clear in its relationship to the work of the League.
- 3 Encourage communication.
4. Be flexible about meeting times, locations, topics, format, etc.

Hold On to Formerly Active Members

(people in transition or who have other priorities now)

1. Call on them for advice on issues they were once involved in.
- 2 Personal notes or separate mailings can assure them that League understands that they have new commitments, but will always value their contributions at any meeting they wish to attend.

3. Be ready to welcome them back to active status when they are ready.

Respect Inactive Members

1. We should indicate their wish to not participate in the database and honor it.
2. Our responsibility is to keep them from feeling guilty. They should feel comfortable just paying their dues and moving in and out of League activities as time commitments and priorities change.
3. Remind inactive members (and yourself) how valuable they are. Their dues work for League when they cannot. Those dues help support the activities of the League. Their numbers swell our ranks and increase our credibility. They serve as goodwill ambassadors for League wherever they go.

5. Funding the League

While the purpose of the League is not to raise funds, we need resources to carry out our work. Fund raising can have additional benefits as well. Fund raising projects can increase the visibility of the League. Members can learn leadership, marketing, and management skills as they work to fund the League. Program interests can be served, e.g., a house tour fund raiser could stress energy conservation features; an elected official directory could be sold to big companies for distribution to their employees.

There are many ways to raise funds. What your League chooses to do will be a function of the available person-power, your financial goals, and your board's imagination.

Dues

Dues support the functioning of *all* levels of League. Your League's membership dues should cover your PMP (per member payments) to the national and state Leagues (and to an inter-League organization, if you are a member) plus an amount that will support the local League. If dues don't at least cover PMP, then every new member can drain financial resources rather than add to them. It is risky to depend upon outside contributions or special event fund raising to cover required PMP. League stability should depend on membership support and not upon outside sources.

PMP

- PMP (per member payment) is the basic cost that must be paid to LWVUS and LWVO. When a member joins – and pays dues to – a local League, she becomes a member of the state and national Leagues automatically; and part of her dues supports League activities at the state and national level.
- All local Leagues must pay PMP to retain their standing as a League.
- The PMP amount is determined by a vote of the delegates to convention. The amount of financial support the local League sends to state or national is the number of members times the PMP. (There are some exceptions: one-half PMP is owed for student members and for additional members of a current member's household, and no PMP is owed for life members.)
- A local League can use tax deductible funds to pay up to 25% of PMP.
- PMP translates into a strong, vibrant, nationally-respected organization, active on government issues, citizen education, and local League growth and development.

Tips from past presidents ... #12

Dues are more than just income for your League; they increase the commitment of your members. And in a culture where we value something more if it has a price tag attached to it, dues remind members of the value and importance of the League.

Finance Drives

Conducting a phonathon, or sending a compelling – or amusing – letter is an efficient way to raise money. In addition to asking current members, try soliciting contributions from:

- former members
- former contributors
- partners in advocacy or citizen education efforts
- small and large businesses, including those where League members work
- individuals and businesses mentioned in financial section of newspapers, in *Who's Who*, etc.
- government officials

Web-Based Solicitations

A “make a contribution” page should be part of any League web site. If your League has the capacity to accept payment by credit card and the capacity to set up a secure site, this is the most effective way to garner on-line contributions. Otherwise, your site should give clear instructions about to whom to address, and where to send, a check.

Planned Giving

A planned gift could be a bequest through your will, but that’s not the only option available for planned giving. A life-income gift trust can be established for the benefit of the League and the donor. A life insurance policy can make a substantial gift at a relatively low cost. A transfer of stocks can provide tax benefits to the donor during her lifetime. Help educate your members about the personal financial and tax benefits of a planned gift. More information is available on the LWVUS web site.

Special Projects/Events

Special events and projects can be used to supplement finance drives and increase your League’s visibility, but they may cost a great deal more. Carefully investigate the return for your time, energy, and money. Possibilities include:

- Special parties: local League anniversary party, state of the city luncheon, etc.
- Auctions
- Speaker events

- Sales of League publications
- Sales of League products: calendars, t-shirts, tote bags, etc. (Take advantage of the opportunity to market to members from other Leagues at convention, and on the LWVUS web site.)
- Sales of League services: moderators for candidate debates, election reporting, etc.
- Sales of advertising in newsletters, Voters Guides, etc. (Clarify your League’s policy on accepting advertisements first.)

Grants

Foundations may be willing to fund special projects or publications. Consider seeking a grant to turn your local study report into a publication that can be made available to the public.

When the LWVO and LWVUS Education Funds receive foundation grants, they may offer pass-through grants to local Leagues working on the project.

Underwriting

Businesses and organizations are often willing to provide funds to support publications, debates, seminars, conferences, projects. In recent years, LWVO has been successful in securing underwriting for portions of state convention, such as an awards luncheon or a training session.

In-Kind Contributions

Many businesses, individuals, or organizations are willing to provide printing or copying, use of phone banks, loaned personnel, office space or meeting room space, or supplies such as paper.

Tax Deductibility

Generally speaking, money given to the League is not tax-deductible. Checks made out to the local League and deposited in the local bank account can be used for all operations of League including **action** and **membership development**. This is known as “hard money.”

Tax deductible (“soft”) money can be accepted only by a League of Women Voters *Education Fund* (LWVOEF) and can only be used for educational activities. It may never be used for lobbying activities or membership recruitment. Checks must be made out to any League of Women Voters Education Fund (LWVEF, LWVOEF, or locally if you have such a fund). They cannot be deposited in a local back account that does

Fund Raising In Action

One local League has turned its major fund raising event into a major good-publicity-generator for the League. The Metro Columbus League gives its “highest honor,” the Democracy in Action award, each year to a person who embodies the League’s mission. The event costs money to implement, but it earns hard money through corporate sponsors (whose names are mentioned in all publicity, the *Voter*, at the event, and in the event’s program book), sales of ads in the program book, patrons (individuals – usually League members or friends of the honoree – whose names are listed in the program book), and general ticket sales.

Tips from past presidents ... #13

Sometimes I can see my board members' attention wander when it's time for the budget report. So it's my job to bring them back into focus. The budget is *not* just the treasurer's concern. Every member of a nonprofit board has a "fiduciary responsibility" for the organization.

(For more on the board members' fiduciary responsibilities, see the President's Packet from LWVUS.)

not have this IRS tax-deductible designation.

Some local Leagues have their own education fund account. Or, any local League may choose to open a local League account with the LWVOEF (League of Women Voters of Ohio Education Fund) to accept tax-deductible contributions.

In order to accept deductible contributions, the LWVOEF was established in 1982 as a 501(c)(3) organization. It operates exclusively for supplementing and extending the citizen education aspects of League work. The LWVOEF accepts funds from local Leagues that are:

- unrestricted gifts to be held for a local League until a project is proposed by that League and approved by the LWVOEF board, or
- restricted gifts for a local League project approved by the LWVOEF board.

A new LWVOEF local League account may be opened by two methods:

- The local League sends the LWVOEF office a check for \$25.00 or more made out to the LWVOEF specifying that an account is to be opened in the name of the local League.
- The state League opens an account for a local League in order to share a portion of a contribution to the state League.

There is no charge to local Leagues using the LWVOEF, and a \$25.00 balance is all that is needed to keep the account open.

When a local League wants to use the funds in its account, the purpose must be pre-approved by the LWVOEF board. The state League is responsible for ensuring that the 501(c)(3) regulations are met, so this approval process protects the tax-deductible status of all the education fund accounts it holds. There should be no delay in accessing funds if the project is a simple Voters Guide or candidates night. Plan ahead for a larger project; gain LWVOEF board approval before submitting project proposals to a corporation or foundation for funding.

For more details, the Ohio League has a very useful publication called "How to Set Up and Use the League of Women Voters of Ohio Education Fund." Order it free from the LWVO office or download from the LWVO web site.

In addition, the LWVUS web site has a number of resources on financial management, including an e-mail list specifically for development and fund raising.

6. Communications

The League newsletter, often called the *Voter*, is a vital tool for communicating with members and potential members. Web sites help Leagues reach out to an even broader audience. But whatever the mechanism, our message must be clear and consistent.

The *Voter*

The *Voter* is the basic tool for communicating with members. It conveys not only information but image. The **president must proofread** copy and has the final say as to what is actually included. Committees may want to plan a general outline of topics for the year and assign articles ahead of time for timeless materials.

Content

To get the bigger picture of what every issue should contain, LWV Illinois recommends that you hang a copy of your *Voter* on the wall across the room from you. Pretend this is some other League's newsletter and take a critical look. Answer the following questions:

1. Is the name of the League or the name of the newsletter prominently displayed?
2. Can you read the print – too small, too fancy, too blurred, too crowded?
3. What is your overall look – crowded and messy or some white space around stories, some variety in sizes of print or headlines?

Now look at the newsletter up close.

1. Have you included how to contact your League (president, membership person, editor, mailing address, phone, and e-mail)?
2. Have you prominently displayed your calendar?
3. Have you included a President's letter?
4. Do you have a variety of stories, written by several writers? (Action or observer reports, brief minutes of meetings or committee reports)
5. Has your letter been proofed for typos, capitalization, and punctuation errors?
6. Have you used pictures or graphics of any kind?
7. Can you include a brief biography of officers or board members, new members?

Tips from past presidents ... #14

Don't give in to the urge to fill every bit of space on the page. A little white space makes a page more inviting and easier to read. I'd rather use a few more sheets of paper to design a publication that people will actually read than to "save paper" by designing something no one will pick up.

Every year...

Once a year, the *Voter* should contain everything your membership needs to know before annual meeting (see bylaws for dates):

- complete listing of local program
- any proposed bylaws changes
- budget and financial report
- nominating committee report

8. Do you have an ad page or supporter page? How does it look?

9. Does your newsletter project a positive image? Is it upbeat? Or is it whining about membership and attendance?

10. Did you include a membership form?

Writing tips:

- Professional writing should be in the third person. After the first use of the complete name of the person in the article, just the last name may be used. Check the spelling of all names.
- Use present tense unless referring to a specific event in the past or future.
- Be direct. Use an active not passive voice.
- Break up long sentences. Delete unnecessary words.
- Use quotes or personal references to maintain interest.
- Capitalize the League, local Leagues, and our League.
- Proof your writing several hours later or the next day.

Avoid including in the *Voter*:

- Results of local consensus on state and national items – since the final position will probably differ in some ways from yours, it may confuse people.
- Conflict and unresolved problems within the League and between levels of League are better handled in a more private way. Keep in mind the broad audience receiving the *Voter*.

Logistics

- Familiarize yourselves with copyright law, and don't reproduce copyrighted items.
- Familiarize yourselves with postal regulations. Take advantage of bulk rates if you can.
- Take advantage of *Voter*-ready material from LWVO and LWVUS.
- Download the official League logo from the LWVUS web site. Pay attention to the guidelines for using the logo.
- Keep membership, mailing, and e-mail lists up to date.
- Decide how to use the internet to distribute the *Voter*. Will it be e-mailed to some/all members? Will it be posted on your League's web site?

- Decide how to format the *Voter* for the web. Will the web version have the content of the print edition, but not the formatting? Or will it be converted to a PDF (portable document format) before it is posted?
- Send a copy of your *Voter* to the appropriate state and national board members and to other participants in a *Voter* exchange.

The LWVUS web site has additional materials on publishing an effective *Voter*. In addition, there is an e-mail list specifically for *Voter* editors.

Web Page

Does your League really need a web page?

Only if you want to provide your members with convenient access to the kind of information they could otherwise only receive by attending every meeting and reading your mail. And only if you want to inform, activate, and involve multitudes of people who might become educated citizens, contributors, or members.

The LWVUS web site offers assistance and templates for producing an attractive, effective, and League-looking web site. There is also a web-master e-mail list, so League web masters can share tips and concerns.

Content

Remember, your web site is read by members of the League and members of the general public. Therefore, the president must have final approval of everything on the web site.

Voter service sections of your web site must be very separate from membership or advocacy sections.

The board should devise web page policies about issues such as:

- who has the access needed to change or add to the web site (the web master and president, of course, and perhaps a very limited number of others)
- approval process for posting information on the web site
- whether/under what circumstances to link to non-League web sites
- when to remove information from the web site
- the content (calendar, membership information, donation information, *Voter*, Voters Guide, study materials, directory of elected officials, action alerts, etc.)

Tips from past presidents ... #15

Spell-check doesn't catch everything. I remember once when a paper our League was about to hand to elected officials announced that the League supported *pubic* meetings. It was only funny because we caught it in time to do it over.

Tips from past presidents ... #16

It takes about two minutes to read aloud one typed and double-spaced page.

- the look
- whether publications the League typically sells can also be downloaded from the web site
- how contributions generated by the web site will be accepted (check or credit card)
- to whom e-mail generated by the site should go
- how to keep voter service separate from advocacy and membership
- how often the site is updated

As web site technology evolves, the support and training provided by LWVO and LWVUS to local Leagues will also evolve.

Public Relations

Public relations is the art and science of building relationships between an organization and its key audiences. As the League of Women Voters, we start with an advantage. The public has already heard of the League of Women Voters, and – even if they aren't entirely clear on what we do – have a generally positive impression of the organization.

Good public relations work will maintain that name recognition and positive reaction as well as educate our members and the public about our positions and voter service activities. This knowledge has the potential to make our materials more sought-after and therefore more likely to make a difference, to make membership in League more attractive, and to increase funding for the League.

Professionals say that one person should handle PR, but that every member should be aware of the effort. The PR person is not necessarily the president, although the president is the official spokesperson for the League and responsible for approving all messages. The PR person can be the one who does the ground work, opening doors for the League's message to reach its audience.

Content

- Voters service is what we are best known for. Be sure to publicize all related activities.
- League publications should be publicized, such as stories of the League presenting a new publication to the library, school, or mayor.
- League programs, including study topics, reports on meetings, annual meetings, and conventions, all provide good material. Also, routine announcements of meetings should be made prior to the meeting.

- League positions can be advocated in letters to the editor and guest editorials. These are sent over your president's signature.
- Finance drives can be supplemented by stories on services provided by the League and the financial need to continue and expand them.

Strategies

Work with newspapers:

- Make personal contact with city editor or editor of all newspapers (including weeklies and special interest papers) and introduce your successor before leaving the job.
- Keep a one-to-one relationship with your contact person; occasional lunches are nice.
- Learn deadlines and preferred format.
- Don't forget to thank and congratulate your contacts when appropriate.
- Don't be afraid to say "I'll have to get back to you on that."

Work with radio and TV, including cable and public networks:

- Make a personal visit to station managers.
- Let them know what we can offer, such as experts on issues we study, nonpartisan voter information, moderators for candidate forums, public service announcements.
- Learn their preferred format and procedures.

Be creative in finding other ways to share information about the League:

- speakers bureaus
- fair booths
- visual displays at banks, libraries, candidate meetings, etc.
- sales of League publications at public meetings
- web site

Tools

Media advisories are used to announce an upcoming event and invite media to cover it.

Press releases are news stories, such as agreement on a new position after thorough study, or the election of a new League president. They can also provide background information or supplement late breaking news. For example, if there's a news story about a toxic spill in an area stream,

Tips for writing PSAs

Allow two and a half words per second, so

25 words 10 seconds
50 words 20 seconds
75 words 30 seconds

Submit a typed script, separating lines of copy as the announcer would read it, with natural breaks.

Use pronouncers for names or unusual words. "President Smythe (pronounced "Smith") has invited the public..."

Send script to the Public Service Director of each radio station.

Allow two to three weeks lead time.

Sample format:

Public Service Announcement
From: LWV of YourTown
Contact: Carrie Catt, 999-5555

For use October – November
10 seconds

ANNOUNCER:

Politics is not a spectator sport.

The League of Women Voters reminds you...

that October 8th is the last day to register to vote...

in the November election.

the League could provide additional background information on area water pollution that it gained in a recent study.)

The basic format for media advisories and press releases is the same. You can find examples on the state and national web sites.

Public service announcements (PSAs) are used to communicate *one* idea to a radio or television audience. They usually last no more than 60 seconds but can be as short as 10 seconds.

Additional resources are available on the LWVUS and LWVO web sites. State and national meetings often have excellent workshops on public relations and working with the media.

7. Membership Meetings

Broadly speaking, there are two kinds of membership meetings Leagues should hold to maintain their good standing: regular membership meetings and an annual meeting.

Regular membership meetings are typically monthly. The content is usually determined by the program/advocacy committee. If the membership is small, each monthly meeting might be a general meeting, meaning all members are invited. If the League is large or particularly active, general meetings tend to be unwieldy. In that case, the League divides itself into "units," and those units hold monthly meetings.

The annual meeting is always a general meeting. It is the meeting that gives members a chance to elect officers, adopt program, adopt the budget, and amend the bylaws.

Unit Meetings

Units are small groups of League members and other interested persons (ideally 10 – 20 people), meeting in a convenient location at regular intervals to participate in discussion of subjects and issues of League concern. Units may be organized on the basis of geographical area and/or time of day.

The overriding purpose of unit meetings is member participation in program development in all its stages: program planning, information giving, consensus, and plans for action.

Other important functions of the unit meeting can be:

- orientation of new members

- development of experts in various aspects of League program
- development of skills in evaluating and interpreting data, formulating problems, and formulating solutions to problems
- development of confidence – as members defend their viewpoints against the questions of other Leaguers, modify their opinions in the light of new information received, and then restate them in a way that others can understand, they are also developing the confidence to do lobbying and public speaking in the future
- preparation for leadership in the League and in the community
- opportunity for board and nominating committee to observe member strengths

Role of the Discussion Leader

A good discussion leader releases the creativity of the group, and helps them arrive at conclusions that are better than those any one person could formulate. Impartiality, organizational skills, an ability to keep an eye on the time, and tact are important in this role.

1. Keep discussion on track. The discussion should proceed in an orderly manner toward a specific objective (e.g., consensus, an action plan).
 - a. State goals at the beginning and keep them well in mind.
 - b. Outline of areas to be covered, with rough time limits,.
 - c. Formulate some provocative questions to ask in order to guide discussion.
 - d. Be aware of repetitiousness. Tactfully move on.
 - e. Be aware of conversation straying from the purpose. Bring wanderers into focus (e.g., “That is interesting, but let’s get back to...”).
2. Accept and encourage all points of view. All sides of the issue should be examined.
 - a. Encourage an atmosphere of respect. Be sensitive to the feelings of the participants.
 - b. Reticent members may need encouragement (e.g., “John, from your experience in..., would you...?”).
 - c. Vocal members may need restraint (e.g., “Excuse me, Jane, before you continue, may I ask if anyone else has a comment on this point.”).
 - d. Call attention to points that haven’t been considered (e.g., “Does anyone have information on...?” or “Has anyone considered...?”).

Meeting Logistics

Think about:

1. When to meet (e.g., morning, lunch, evening, best day of week).
2. Where to meet (e.g., convenience, attractiveness, public facilities vs. private homes).
3. How to invite members and public (e.g., *Voter*, news media, signs, phone calls).
4. Provision for discussion leader, recorder, child care, supplies.
5. How to welcome and encourage those who attend (e.g., name tags, personal greetings, coffee/foods, circle seating arrangement).
6. Announcements to be made (e.g., League news, next meeting).

- e. Refrain from injecting your personal beliefs and attitudes.
3. Help the group clarify their thinking.
 - a. Be alert to areas of agreement and announce them as they become clear.
 - b. Use conflict constructively (e.g., “Are there aspects of these two views which are acceptable to all of us?” or “Since we do not seem able to resolve this difference now, could we move on to the next point? Perhaps further discussion will reveal additional information on this issue.”).
 - c. Rephrase and summarize.
 4. Bring discussion to a close.
 - a. Restate the purpose of the meeting and the main topics covered.
 - b. Restate the agreements reached.
 - c. Restate points on which diverse views were not resolved.
 - d. Restate any plans for action formulated by the group.
 - e. Thank the participants.

Role of the Recorder

1. Relieve the discussion leader of responsibility to take notes or trust memory.
2. Record main points of discussion, points of agreement, majority and minority opinion, and final decision. This is especially necessary for a consensus meeting.
3. If needed, read portions of notes to the group for clarification and correction.
4. Prepare summary report. For consensus, this report, along with reports of other units, will form the basis for the position statement.

Annual Meeting

This important meeting’s required activities and deadlines are usually spelled out in your League’s bylaws. Generally speaking, members at annual meeting:

1. Elect a board representative of the membership.
2. Adopt local program that reflects the interests and capabilities of the membership.

3. Adopt a budget that allows the League to meet financial obligations to other levels of League, allows for growth, and has flexibility.
4. Review or amend the local League bylaws.

Timeline

1. Soon after the last annual meeting (certainly by fall) **set a date** and time for the next one. Consult bylaws for timing.
2. **Appoint annual meeting chair** and committee early, especially if they will coordinate the work of the budget committee, program planning, etc. If this committee plans the logistics but not the content, then work can begin a few months before the scheduled annual meeting.
3. **Bylaws committee** meets early in fall since proposed changes must go to LWVO board for comment early in December.
4. **Nominating committee** needs to begin four or five months before member notification deadline. Consult bylaws for that date.
5. **Budget committee** may want to work closer to notification deadline so more financial information about preceding year will be available.
6. Three months before meeting, **request input** from members on program and possible board members. Also, **plan arrangements**: menu, name tags, guest speakers, honors to be awarded, etc.
8. Two months before meeting, the board determines **recommended program** (positions to retain, to drop, and new studies), based on member input through program planning.
9. **At least one month before the meeting, notify members of everything they can expect to vote on – program, bylaws, budget, members to the board.** This gives members time to lobby other members to support or oppose certain proposals.

Role of the Bylaws Committee

Bylaws are the basic regulations by which your League is governed. (Details should be handled in board policies, not in the bylaws.) Bylaws should not be unduly restrictive and should seldom require modification.

The first three articles of your bylaws must conform with the first three articles of the LWVUS bylaws. Changes made at national conventions may be incorporated into local League bylaws as an editorial change. Please note that the kinds of membership listed in Article III are the only kinds of membership in the League. Some Leagues have more complex dues structures, but these are not a different type of membership.

Tips from past presidents ... #17

There's a lot of business to take care of at annual meeting, but don't forget to have fun. This is one meeting that many members attend – and it's generally not because of those fascinating bylaws changes. Annual meeting is a time to reconnect with friends and celebrate the League. So, spend some time talking about accomplishments, pat yourselves on the back, do a silly skit or make up a song, recognize the special efforts of some member, and, above all, have a good time.

Talent Scouts

Be creative and optimistic in identifying the talents, skills, time requirements, and people you will need.

- Solicit suggestions from the membership, board members, and the president (who must not participate in this committee – this is the only committee on which the president does not serve in an ex-officio capacity).
- Interview current board members individually to discover if they wish to continue and to learn how board members work with each other.
- Get testimonials from current board members about their exciting experiences, skills learned, how they kept the job manageable etc. This can be used to persuade others. If necessary, potential nominees can be encouraged to talk personally to some enthusiastic ex-board members.
- Attend board and League meetings to observe people first hand.

When you make one change in your bylaws, be sure to check for consistency among your bylaws. Several other sections may need to be amended.

Proposed bylaw changes must be submitted to state League for review before they are submitted to your membership. The due date in LWVO office is usually December 1st. Be sure to include both old and proposed wordings and an explanation of why the change has been proposed. The board may wish to modify the proposals after receiving LWVO comments.

Proposed bylaws and explanations should be distributed to the membership, usually one month before annual meeting. Check your bylaws for requirements.

Role of the Nominating Committee

First determine which officer and board director positions need to be filled. Your bylaws will help with this. There may also be some unexpired terms to be filled. Since this committee is so important to the healthy functioning of the League, give special attention to finding successors to the nominating committee – people who know many people and who are tactful, persuasive, and discreet.

The local nonpartisan policy should be reviewed so that only appropriate persons will be asked to serve and so that you can explain its implications to potential board members.

As you deliberate, think about balance and vitality. A healthy board is not a static one. In general, **it is not wise to keep the same person in the same position for more than two terms**. Try to balance seasoned members for continuity with new members for fresh ideas. Also try to represent differing points of view in your community.

Invite potential candidates to serve.

- The approach should be positive. Make this a special invitation to this special person. Keep in mind the testimonials you have heard, your own positive experiences with League, the reasons you believe this specific person would contribute a lot and gain a lot from the experience.
- The approach should be candid. Be clear about expectations that board meetings must be attended and that involvement extends to total board planning and policy making, not just a specific job. Avoid assigning jobs if possible. The new president and board need to have flexibility to set new priorities and organize in new ways.
- Avoid panic. Some refusals and dropouts are to be expected. Never

offer a position to someone unqualified – better to leave it open. Be confident in the value of League.

A report to the board of your slate before notifying membership is a courtesy. The board does **not** approve the work of the nominating committee. The slate should be published for the membership. Check bylaws for the required date. Also, publicize the fact that the membership may present additional nominations from the floor.

Role of the Budget Committee

The treasurer and president are ex-officio members of the budget committee. The chair and two or three other members, all appointed by the board, complete the committee. It is good to have one person marvelous with detail and one who is philosophical and sees the big picture.

The bottom-line task is to construct a balanced budget where all income (including dues, cash or in-kind contributions of members and others, advertising income, fund raising projects, grants, interest) equals all expenses (including operating costs, board and committee expenses, training and convention representation, support for other levels of League, publications, voters service, advocacy, educational expenses).

A worksheet with proposed budgets and actual income and expenses for the last several years will help.

Expenses need to be examined first.

- Think about the League's priorities and plan to spend appropriately to meet them.
- Think about new services, projects, or equipment. You may need to begin accruing funds for them.
- Support for other levels of League is essential. Make sure you know the proposed PMP figures for state and national.
- Do you need to begin reimbursing for more expenses, to consider having an office, or hiring permanent or temporary staff?
- Make sure estimates are realistic. Look at what was actually spent this year including accurate listing of members' expenses which were given as contributions. Have each committee anticipate changes for next year depending on their priorities.

Income must to be found to match these expenses.

- Are dues high enough to cover PMP and some service to the League?
- Can you charge for some services now provided free?

Tips from past presidents ... #18

I'll be honest. As a new League president, I didn't have time to thoroughly read all of *In League US*, *Impact on Issues*, *Agenda for Action*, the *Voter Service Handbook*, and the *President's Packet*. I am really glad, though, that I took the time to look through all of them. I found answers to many questions. I was alerted to ideas and issues beyond my own League experience. And I was able to copy and forward some great information to my board members.

- Consider using the LWVO Education Fund so you can solicit tax deductible contributions.

Reserves

- It is a good idea to have a cushion of reserved savings to equal about three or four months' expenditures. Reserves do not need to be built to large amounts.
- Many Leagues also build some earmarked reserves – for example, savings for a publication, for equipment, or for convention expenses, allowing half to accumulate each year.
- If you plan to use some reserves in this year's budget, they can be listed in income under "income from reserves" and under expenses as "reserves for..." The rest of the reserves are not listed in the budget, but are part of the treasurer's report.

Prepare a budget for board approval and recommendation for adoption by members. Check bylaws for time members must be notified. Plan to have budget ready for board approval one or two months prior to publication for the membership. Finally, plan a lively, imaginative presentation for annual meeting.

Role of the Program Committee

The board, with the assistance of the program committee, must present a recommended local program to the membership. Usually bylaws require that complete wording of both recommended and not recommended items be published one month before the annual meeting. See the program section starting on page 16 for a more complete discussion of local program, how it is developed, and program planning.

Once ideas are discussed and definite proposals made, the board recommends:

- current positions to be retained (changes in wording can be proposed if no substantive changes are made)
- current positions to drop
- current positions to expand by additional study
- new studies to be undertaken. Complete wording of the study proposal and the scope of the study is approved.

All other specific proposals from the membership become not recommended items and are also published.

The membership will not vote on whether to do state or national studies, update "Know Your Community" booklets, etc. The board may

want to inform the members of plans for such activities, but they are not considered local program.

Informing Members

So, you've meticulously followed the bylaws, notifying members of all the issues up for a vote at annual meeting, and now that it's over, everyone is ready for a break. Go ahead and take a break, just remember to publish the outcome of all those annual meeting votes in the next *Voter*.

Tips from past presidents ... #19

Enjoy it. It's all worth it!

Sample Agenda

Call to order (Number required for a quorum is _____, according to Bylaws)

Secretary's Report

Treasurer's Report (including auditor's report)

Bylaws

Proposed Bylaw Amendments

Discussion

Adoption of Amendments

Budget

Budget committee presentation

Discussion

Adoption

Program

Proposing items

Presentation of recommended program items

Presentation of not-recommended program items

Vote (after each non-recommended item) for consideration

Board rebuttal of each item voted consideration

Adoption of Items

Discussion of items (recommended and not-recommended voted consideration) and voting individually in order of presentation.

Nominations and Elections

Report of Nominating Committee

Nominations from the floor

Election of Officers and Directors

Other Business

Adjournment

Guide to Information Available from the National and State Leagues

RESOURCES	WHAT'S IN THEM	WHERE TO FIND THEM
League Administration		
<i>In League LWVUS</i>	Sometimes referred to as the "League Bible." Comprehensive information about League structure, leadership roles, and policies. Essential reference for any League president.	No longer available in hard copy; download from the LWVUS web site.
<i>In League In Ohio</i>	An Ohio-specific supplement to <i>In League LWVUS</i> . A vital resource for League presidents in Ohio.	One free copy is sent to each League when a new edition is printed. Purchase from the LWVO office. Also, download from the LWVO web site.
Weekly President's Updates (from LWVUS)	Timely information about on-going projects, new opportunities, and more. Also includes the Post-Board Summary following each LWVUS board meeting.	E-mailed weekly to all state and local League presidents most weeks of the year.
Presidential Update (from LWVO)	Key information about on-going projects, new opportunities, deadlines, etc. "Must-have" resource for presidents replaces the LWVO Post-Board mailing.	E-mailed bimonthly to all local League presidents in Ohio. Other League members subscribe by contacting LWVO. Archived issues are on the LWVO web site.
"For the New and Not So New Board Member"	Brochure overview of board member responsibilities and tools for success.	Free in limited quantities. Contact the Ohio League office to order.
LWVUS Bylaws	The most basic document about how the organization functions. Updated and reissued after each national convention.	Posted on the LWVUS web site.
LWVO Bylaws	The most basic document about how the LWVO functions. Updated and reissued after each state convention.	Posted on the LWVO web site.

RESOURCES	WHAT'S IN THEM	WHERE TO FIND THEM
Program and Advocacy		
<i>Impact on Issues</i>	The basic resource on LWVUS positions, with all official position statements, background, and past action. Updated after national convention. Vital for participating in local, state and national program planning and action.	One free copy is sent to each League after convention. Additional copies can be purchased by contacting pubsales@lww.org , or download from the LWVUS web site.
<i>Agenda for Action</i>	Complete list, history, and guide to state positions that form the basis for League action at the state and local levels. Updated every two years, after state convention	One free copy is sent to each League when a new edition is published. A summary is on the LWVO web site. Purchase by contacting the Ohio League office.
“Taking Action: How to Use Local, State, and National LWV Positions”	Decision-making tool guides local Leagues on using local, state, and national positions to take action.	Purchase by contacting the Ohio League office.
LWVUS Action Alerts	Issued as legislative action is needed at the federal level. A good way to engage new members and potential members.	E-mailed to state and local leaders to be shared with their members. Members can join the “Grassroots Lobby Corps” to receive alerts themselves. Archived alerts are on the LWVUS web site.
LWVO Action Alerts	Issued when local lobbying can play a critical role on a state legislative matter. Includes action needed, background info, and talking points.	E-mailed to local League presidents and any member who requests to be on the e-mailing list. Contact the LWVO office to subscribe. Also posted on the LWVO web site.
Program materials/kits	LWVUS or LWVO program and/or study materials on specific issues, often meeting-ready materials about “hot” topics with an action component. Kits are often dependent upon outside funding and therefore not produced on a regular basis.	Kits are announced in League communications, and most are posted on the LWVUS or LWVO web sites.
“Creating Communities of Inclusion”	Tips on creating broad-based community coalitions, with models and guidance to activists.	Download from the LWVUS web site.
LWVO Legislative Updates	The latest information on state-level action on League positions, written by LWVO volunteer lobbyists.	E-mailed to local League presidents and any member who requests to be on the e-mailing list. Contact the LWVO office to subscribe. Also posted on the LWVO web site.

RESOURCES	WHAT'S IN THEM	WHERE TO FIND THEM
Membership		
“Member News & Views”	Newsletter with membership tips, local League success stories, and leadership articles.	E-mailed to all local and state League presidents and membership chairs. Archived issues are on the LWVUS web site.
“Member Database Instruction Manual”	Shows, screen-by-screen, how to update member records, add a new member, and inactivate members.	Contact membership@lww.org for an electronic copy. Members of the Field Support staff also provide training via telephone.
Diversity Toolkit	Guides Leagues through a series of exercises to explore how to become more externally oriented and to engage their communities more fully.	A limited number of hard copies are available by contacting membership@lww.org.
Membership brochure	Effective message and graphic design highlight brochure that has space for Leagues to insert their address and dues information.	Purchase by contacting pubsales@lww.org. Or download from the LWVUS web site.
Voter Service		
<i>Face to Face: A Guide to Candidate Debates</i>	Comprehensive handbook on debates for any elective office. Based on the experience of LWV debate sponsors at all levels.	Download from the LWVUS web site.
<i>Voters Service: A Handbook for Ohio</i> (A little old, but still valuable)	Ohio-specific info on registering voters, publishing election information, hosting candidate meetings, poll watching, and more.	Purchase by contacting the Ohio League office.
Financial: Education Funds		
Guidelines for Education Funds	Guidance on appropriate and inappropriate uses of education fund or 501(c)(3) monies. Helps Leagues set up an education fund account with the LWVEF.	Download from the LWVUS web site. For more information, contact grantservices@lww.org.
How to Set Up and Use the LWVO Education Fund	Guidelines for establishing a fund with the state League to receive tax-deductible grants and donations.	Free from the Ohio League office, or download from the LWVO web site.

RESOURCES	WHAT'S IN THEM	WHERE TO FIND THEM
For Members and the Public		
Ohio Voter	LWVO quarterly newsletter with info about state legislation, candidates and issues, studies, meetings, etc.	Mailed to every Ohio League member. Archived issues are on the LWVO web site.
LeaguE-Voice e-newsletter	Monthly electronic newsletter from LWVUS has timely updates about national legislative efforts, press statements, news, and member-only features.	Distributed to all members for whom LWVUS has an e-mail address. Members and nonmembers can subscribe themselves. Archived issues are on the LWVUS web site.
“Welcome to the League: A Handbook for New Members”	Informative guide to League history, activities, lingo, and more. Generic enough for any League and easily customizable.	Purchase by contacting the Ohio League office.
League Overview Brochure	Informational brochure about the programs and mission of the League. A useful tool when meeting with external groups and/or new donors.	Purchase by contacting pubsales@lww.org .
Other		
On-line discussion lists	There are several of these member-only on-line forums. Some are issue-specific, and others relate to organizational topics such as development, outreach, and web site development.	Individuals can subscribe themselves through the LWVUS web site. There is a specific list for League presidents.
“Member-At-Large Unit Handbook”	Guidelines for managing and maintaining an MAL Unit.	Purchase by contacting the Ohio League office.
LWVUS/EF Annual Report	Produced annually. Can be helpful for Leagues approaching corporate sponsors or foundations.	Order copies from development@lww.org , or download from the LWVUS web site.
Keep in Touch		
League of Women Voters of Ohio office	17 South High Street, Suite 650 Columbus, OH 43215 614-469-1505 877-LWV-OHIO (877-598-6446)	www.lwvohio.org
League of Women Voters of The United States office	1730 M Street, NW, Suite 100 Washington, DC 20036 202-429-1965 general 202-429-4343 fax 800-424-2937 (leaders only please)	www.lwv.org (Includes a members-only area. Register on the site.)

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May 2006