



# LEAGUE BASICS

*Formerly "In League"*

League Basics contains essential policy and organizational information applicable to every local and state League. League Basics offers advice, guidelines and more detailed information to help leaders develop specific methods of operation to enable a League to accomplish its goals.

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# LEAGUE BASICS

## Preface

The League of Women Voters is a volunteer organization that does a professional job. The League tackles important public issues and is a respected, trusted asset in cities and towns across the country. League leaders empower others to define and accomplish goals—for themselves, for the organization, for their communities and for the nation. Through these goals, the organization fulfills its mission and grows.

Throughout its history, the League of Women Voters has been a dynamic, changing organization, adapting procedures to meet current and future needs. League leaders make their communities stronger, healthier, and more vibrant. This handbook and the additional information available on the League Web site ([www.lwv.org](http://www.lwv.org)) are essential tools to help League leaders be more effective and to help make the organization more effective.

While there are fundamental similarities among Leagues everywhere, each League has its own special characteristics. The size, distribution and demographics of membership; time and money resources; and community/state issues all affect the structure and operations of a League.

*League Basics* contains essential policy and organizational information applicable to every local and state League. The Web site offers suggestions, advice, guidelines and more detailed information to help leaders develop specific methods of operation to enable a League to accomplish its goals.

## 1. Introduction

The League of Women Voters is a nonpartisan political organization that encourages informed and active participation in government, works to increase understanding of major public policy issues and influences public policy through education and advocacy. This is the organization's mission statement.

The League of Women Voters is organized to parallel the three levels of government: local, state and national. In some areas, local Leagues have formed Inter-League Organizations (ILOs) to address regional concerns. At each level, the League is governed by a volunteer president and board of directors.

In order to maintain its status as a part of the League of Women Voters, each local League is required to:

- **Have bylaws, the first three articles of which should be consistent with those of the LWVUS. The remaining articles must provide for democratic procedures.**
- **Establish and maintain a nonpartisan policy.**
- **Hold an annual business meeting of the membership.**
- **Hold regular board meetings.**
- **Meet its financial obligations (per member payment) to the state and national levels of the League and adopt a financial plan for sustainability and for carrying out the League's mission to its community.**
- **Have a plan for membership growth and retention that encourages a membership as diverse as the community.**
- **Act in ways that are consistent with League principles, positions and policies.**

Women—and men (since 1974)—who are citizens and at least 18 years old may join the League as voting members. Associate (non-voting) membership is available for younger people and non-citizens. Joining at any level of the organization automatically confers membership at every level, and with that membership comes the opportunity to make an impact on local, state, regional and national public policy issues.

(Best practices corresponding to each of the above requirements are listed in the Leaders section of the League Web site.)

## 2. Bylaws: How the League Governs Itself

Bylaws are fundamental rules drawn up by organizations to govern their internal affairs and their dealings with members and others. They include rules that the organization considers so important that they cannot be changed without prior notice to members and the vote of a specified majority.

League bylaws define the League's purpose and how it organizes to further that purpose. They are meant to protect the organization and to provide an operating framework.

### First Three Articles

The first three articles of the national League bylaws set forth the League name,

present the League's purpose and policy, and define membership in the League. The first three articles of all local and state League bylaws must be consistent with those of the LWVUS in order to define and maintain the unity of the organization and the powers and privileges of members.

## Remaining Articles

Leagues may decide what to include in the remaining articles of their bylaws, provided they reflect democratic procedures. Normally, they contain provisions covering the organization's officers, board of directors, financial administration, nominations and elections, program, business meetings, parliamentary authority (i.e., Robert's Rules of Order), and method of amending the bylaws themselves.

## Amending Bylaws

Boards should review their bylaws from time to time to make certain they are still appropriate based on changed circumstances or actions taken at state or national League conventions. Before starting the amendment process, a League should consider whether the desired outcome could be achieved by another method (such as a board motion, annual meeting/convention vote, or development of a new policy or procedure). Any amendments to the first three articles that are made at a national convention must automatically also be made to local and state League bylaws; approval at an annual meeting/convention is not required to make the change (but the change should be announced).

(The national League bylaws and sample bylaws for local and state Leagues, as well as guidelines for bylaws, are included in the [Leaders Section](#) of the League Web site [www.lwv.org](http://www.lwv.org).)

# 3. Political Yet Nonpartisan

Soon after the League's founding, the decision was made to take positions on issues but to neither support nor oppose any political party or candidate (appointed or elected) for public office. Today, this policy continues to ensure that the League's voice is heard above the tumult of party politics.

To ensure the credibility of the League as a nonpartisan organization, each League's board of directors is responsible for drafting and carrying out its own nonpartisan policy and for seeing that both its members and the public understand the League's nonpartisan role.

Leagues should also have a conflict of interest policy related to board members' paid employment, service on other boards (including League boards at other levels), personal lobbying, etc.

(Information about developing and implementing a nonpartisan policy, the nonpartisan policy of the national League board and sample policies for local and state Leagues are included in the [Leaders section](#) of the League Web site. Sample conflict of interest policies are also included on the Web site.)

## 4. Board of Directors

The board of directors is the administrative and policymaking team for the League. Board members often assume specific duties, but *all* members of the board are responsible for planning and decision-making in several broad interdependent areas:

- Organization and Management: membership growth and participation; adequate financing and realistic budgeting; internal/external communications; visibility; and efficient administrative operations.
- Voter Service/Citizen information
- Program: study, consensus, advocacy

The board as a whole:

- Sets priorities and goals for the organization.
- Carries out overall planning and decision-making..
- Supports membership, development and visibility activities.
- Represents and promotes the League in the community.
- Safeguards the League's reputation for nonpartisanship.

The president:

- Leads the League.
- Speaks for the League.
- Empowers and trains League leaders.
- Organizes and delegates League tasks.
- Convenes and presides over meetings.

Individual board members:

- Attend and participate in all board meetings.
- Identify and mentor new leaders.
- Promote growth and diversity in membership.
- Support and attend League activities.
- Become knowledgeable about League positions and practices.
- Explain and promote the League in the community.
- Understand and abide by the League's nonpartisan policy.
- Assist in fundraising activities.
- Make personal financial contributions, in addition to dues.

- Attend state and regional League meetings.
- Carry out individual assignments.

## Organization of the Board

Leagues operate under a variety of board structures. Many League boards assign specific portfolios or areas of focus (e.g., membership, development, communications, advocacy, voter services, etc.) to their members, while others have established three or four committees organized around priorities identified by the board. Some Leagues have created the position of president-elect to provide an automatic succession mechanism.

Establishing co-presidents or leadership teams is also a way Leagues are organizing themselves to share the duties of the president. It is important, however, for co-presidents or leadership teams to define clearly the duties and responsibilities of each. It is not necessary to change League bylaws in order to have co-presidents, rather than a single president.

Executive committees, consisting of the president (or co-presidents) and several board members, can assume specific assignments and take action on board matters between regular board meetings, in accordance with powers granted them in the bylaws.

## Making Decisions

Board meetings are held as often as needed for the board to plan, direct and evaluate the work of the League. Frequency of meetings is usually stipulated in the bylaws. The board focuses on the broad policy, program and administrative decisions that must be made and should not get bogged down in detailed planning and implementation. These are best left to committees or assigned volunteers. Agendas for upcoming meetings and minutes of previous meetings should be circulated to board members ahead of time, along with written board briefing materials for members to review. Use of a timed agenda will assure that there is an opportunity to discuss each topic and will facilitate beginning and ending the meeting on time.

Although most board meetings will probably take place in person, bylaws may authorize electronic meetings if they are conducted by a technology (such as telephone or video conferencing) that is available to all and allows all persons participating to hear each other at the same time. E-mail is useful for communications between board meetings, but official decisions may be made by e-mail only if:

- the bylaws specifically authorize them and
- discussion/debate procedures have been adopted in advance.

(The recommendations noted above comes from several nonprofit governance organizations and Roberts Rules so that any official business done via email is well handled and documented. Further information on electronic board meetings can be found

in the [Leaders section](#) of the Web site.)

## Leadership

Some leaders rise to leadership progressively through the League, while others may assume a leadership position without a lot of League experience. All, however, are committed to facilitating the organization's bold steps forward to ensure the League's success and future.

League leaders are expected to produce a wide range of results, but one of the most important ways to build the organization is by developing and mentoring new leaders. Current leaders can empower future leaders by helping them acquire the skills to build the organization's future, such as planning and setting goals, defining priorities, and maximizing resources.

## Nominating Committee

The nominating committee is charged with the important responsibility of identifying future League leaders. It is the task of the committee to promote service on the board as something that not only enhances the organization but also provides a chance for members to serve the organization—and experience personal growth.

The committee needs to be operational soon after its members are elected and operate on an ongoing basis. It should be proactive, seeking those who have particular skills of value to the organization—from among both League members and those who are not yet members. Nominating committee members should attend several board meetings in order to familiarize themselves with how the board operates and the responsibilities of the various board positions. This knowledge will assist them when they are considering the appropriate people for leadership positions. Unlike other League committees, the nominating committee is responsible to the membership, not to the board.

The nominating committee traditionally presents a single slate of officers and directors to the annual meeting or convention, although there is usually no bylaws requirement to do so. League bylaws do, however, provide for nominations from the floor.

(Information about board organization, board orientation, strategic planning, priority setting, parliamentary guidelines, and nominating committee procedures, as well as job descriptions for specific board portfolios, can be found on the [Web site](#).)

## 5. Money Matters

The board of directors bears the legal responsibility for the League's funds. In order to carry out this responsibility, procedures should be in place to ensure that

- Financial records are accurate, up-to-date and documented.
- Appropriate internal controls are in place.
- No single person has complete control over financial transactions.
- Access to computerized financial records is limited through use of a password.
- Computerized records are backed up on a regular basis, with off-site storage.
- Financial records are periodically reviewed or audited.

(For more information on financial procedures, see the Leaders section of the League Web site.)

## The League Budget

A budget is a planning instrument that reflects the goals, priorities and activities planned for the year. It is the responsibility of a local/state League board to

- Provide input to the committee charged with budget development.
- Review the proposed budget prepared by the committee.
- Revise it as necessary.
- Recommend its adoption by the annual meeting/state convention.

A well-conceived, realistic gross budget

- Reflects all anticipated income and expenses for a fiscal year.
- Shows planned growth in members, dues, contributions and League activities.
- Includes funds for sending delegates to state and national conventions (an important investment in the League's future).
- Reflects each League's obligation to support the League as a whole through the per member payment (PMP) system. (The LWVUS *President's Packet* discusses in detail how the PMP assessment and billing system works.)

Once League members or their delegates adopt the budget, the board is responsible for seeing that it is carried out. Expenses should be recorded and allocated in the same fashion as they were budgeted, and the board should approve any significant expense requests that were not budgeted. The board can revise the budget to respond to changed circumstances, for example if a grant or donation comes in that was not anticipated in the budget, the board has the authority to make those kind of adjustments. Having said this, it is usually the case that Boards do not make major changes in the overall level of expenditures authorized or the general direction of League emphasis approved at the annual meeting or convention.

## Development

The League of Women Voters at all levels must be adequately financed in order to operate and achieve its goals. And each level of the League is responsible for the financial well-being of the League as a whole. Financial support for League activities comes from members (who are our most dedicated and committed source of funds) and

from the community (individuals, foundations, corporations and businesses).

Fundraising, more aptly termed “fund development,” is a year-round effort, not just a once-a-year fundraising drive. It must be built into every activity and project on the League’s agenda, and it is every board member’s responsibility. In addition to using contacts and making fundraising calls to ask for support for League projects and general operations, another way for a board member to assist with this effort is by making a contribution that is significant for his/her means.

It is reasonable to ask League members to make additional annual financial contributions, over and beyond their dues payment. In addition to mailings, telephone solicitations and personal visits, a League is encouraged to have its Web site includes the capability to receive contributions via a secure system.

Since most giving comes from individuals (not corporations and foundations), Leagues should plan their fundraising efforts accordingly. No matter what development methods are used, remember that appreciation and recognition help to ensure repeated gifts.

(For more information on League development methods/fundraising tips, see the [Leaders section](#) of the League Web site.)

## Tax Status

For tax reasons, the League maintains two legal entities to carry out its mission. The LWVUS and nearly all state and local Leagues are 501(c)4 organizations, which means that contributions to them are not tax deductible. An individual cannot deduct League dues on his/her income taxes as a charitable contribution because the League is established as a lobbying organization.

The League also maintains an education fund—the League of Women Voters Education Fund (LWVEF). It is a 501(c)3 organization, which means that contributions to it are tax-deductible for the donor. It is through this side of the League that voter information and citizen education activities are carried out at the national level, many through grants from foundations. A number of state Leagues and a few local Leagues also maintain education funds. Many of the educational activities conducted by state and local Leagues are eligible to be funded with tax deductible monies.

As a service to Leagues, the State and Local Grants Program of the LWVEF banks funds raised by local and state Leagues that are earmarked for local/state educational activities, thus freeing Leagues of the legal and fiscal red tape that operation of such a fund entails. (There is no charge for this service.) The key criteria for ensuring that such a project is “educational” are:

- No lobbying will be associated with the event/publication, although advocacy is acceptable (see below for more information about advocacy vs. lobbying).
- The event/publication will be offered to the general public.

- Questions for candidates will be neutral/nonpartisan.
- All candidates will be treated equally.

In addition, a state or local League may authorize a transfer from its account to the LWVEF general operating account in lieu of paying a portion of its PMP. (See the LWVUS [President's Packet](#), available on the League Web site, for further information.)

The Internal Revenue Service has developed detailed regulations on tax-deductible and non-tax-deductible contributions. For example, specific language must appear on reply forms for fundraising letters indicating whether or not a person's contribution to the League will be tax-deductible. When putting on a fundraising event, the League must be sure to let donors know what portion of the event ticket price is tax-deductible (if any).

The IRS also has detailed reporting requirements and restrictions on certain activities that are funded with tax-deductible monies. Voters' guides and candidate debate activities are sometimes reviewed to ensure that they do not give the impression of favoring any particular candidate. Questions should be unbiased, even on issues where the League has a position, so as to not reflect or suggest a bias or preference for or against any candidate's views. Events exhibiting even an unintentional bias may jeopardize the League's tax-exempt status. Leagues are strongly encouraged to refer to publications such as [Face to Face: A Guide to League-Sponsored Debates](#) (published by the LWVEF) and [The Rules of the Game](#) (published by The Alliance for Justice) to ensure that their events meet all legal requirements.

While most educational activities conducted by Leagues can be funded with tax-deductible resources, it is strongly recommended that the 501(c)4 (the local League - rather than 501(c)3 Education Fund) host most of its events. This procedure is recommended because direct membership recruitment can take place at an event hosted by a 501(c)4 organization (the local League). The event can be funded with a grant from an education fund, provided that the membership materials to be distributed are funded by the 501(c)4 organization (local League) itself. League moderators and leaders can and should encourage people to join the League from their presentations at the podium or include membership ads in voters' guides, again as long as the ad is paid for with 501(c)4 money.

League volunteers may hand out brochures that describe the League to the audience, announce the availability of these materials from the podium, and even encourage individuals to sign up to receive additional information about the League (which can then be followed up by a mailing or e-mail notice).

Leagues using education fund monies should create an agreement between their 501(c)4 and 501(c)3 and make a grant to cover educational activities sponsored by the League. (See voter services section and the Fiscal and Compliance Issues under "Essential League References" of the Member Section of the Web site for detailed information on the use of education fund monies and procedures for using the LWVEF State and Local Grants Program.)

Note that it is possible for certain advocacy—but not lobbying—activities to be carried out using tax-deductible monies. Advocacy is a broader concept than lobbying. The League advocates for change through the education of policymakers and the public, and education is a legitimate use of such funds as long as care is taken to be sure that lobbying does not take place. Lobbying is defined as an attempt to influence specific legislation, transmits a point of view on a specific piece of legislation to elected officials or their staffs, as well as a call to action urging the public to contact their legislators about a specific piece of legislation. Lobbying activities must be funded through general operating funds (501(c)4).

## 6. Membership

Members are the League's most valuable asset. They give the League clout, visibility and credibility. The organization's strong grassroots system distinguishes the League from other organizations; the League is *the* organization where hands-on work to safeguard democracy leads to civic improvement.

Members belong to all three levels of the League—local, state and national. Member categories (e.g., individual, household, student, associate, life member) are defined by the LWVUS Bylaws. Membership dues make up a significant portion of the income in most local League budgets. Dues levels are set by each local League, and collecting dues is the responsibility of the local League. A proactive and structured dues renewal process is important to member retention.

Leagues are responsible for paying a per member payment (PMP) for each locally recruited member to the LWVUS and their state League. National PMP is set by delegates at the national convention, and state PMP is set by delegates at the state convention.

Leagues need to recruit new members to continue, advance and hopefully expand their good work. A growing, thriving membership enables the organization to succeed in accomplishing its goals and fulfilling its mission. Membership recruitment is the result of intentional actions by both leaders and members and occurs mostly at the local level. However, no matter how dynamic a local League may be, membership growth does not just happen. It requires planning, year-round attention and a strong partnership among all levels of the League. Information to assist in membership recruitment and retention can be found in the Member Section of the LWVUS website.

In addition to its leadership role in building an organization that will attract new members and promote the involvement of current members, the board of directors—collectively and individually—is responsible for:

- Building membership recruitment efforts into all League activities.
- Designing activities that will appeal to diverse groups.

- Individually promoting the League and League membership at every opportunity.

The key is to *ask* people specifically to join the League. No opportunity is too small or too big to promote League membership.

Though members belong to all three levels of the League, it is usually at the local level that they experience what it means to belong to the League. The local League has an essential role in making that experience satisfying and enjoyable. Since members who are engaged in the work of the League are more apt to renew their memberships, each member should be given an opportunity to contribute his/her individual talents in a way that is satisfying and flexible. The goal is to ensure that all members feel that their involvement with the League, whether active or supporting, is essential to the League's strength and success.

(Tips for membership directors, a job description, information on diversity policies and examples of dues structures can be found on the [Web site](#).)

## 7. Communications

Everything a League does involves communications: voter services, Citizen information, advocacy, membership, fundraising, etc. The target audience may be internal/external or both. The key is making sure that your League's message is focused, that it is heard and understood, and that it will have the maximum impact on the intended audience. To be effective, a communications strategy cannot be undertaken as an afterthought. It must be built into every activity and project on the League's agenda.

### Visibility

The League's visibility in the community or state depends largely on how successful it is in getting stories carried by the print and electronic media. This requires knowing the media and how they function, analyzing the political forces in the community working for or against a particular issue, taking the pulse of public opinion, making a realistic assessment of the League's resources that can be committed to a particular project, and recognizing and promoting the League's niche or perspective on a story. (Note that template press releases on League issues, projects and member recruitment are frequently available on the League Web site. Additionally, a "Communications Tool Kit" can be found in the Member Section of LWVUS website. It has been created to help promote your League's image and activities and build a communications strategy into every activity on your agenda.

**Every League needs a permanent address and phone number.** For those without offices, this should be a post office box and a telephone with voice mail, both of which need to be monitored routinely and often. To facilitate a uniform image of the League, it is advisable for every League to use the League's registered (trademarked) logo on all

publications, League letterhead and the Web site. ([Downloadable logo files and standards for use of the League logo are on the League Web site.](#))

## Web site

Every League should have its own Web site, which should be linked to the national League Web site. A Web site is the League's face to the community—both the public and its members. It should be informative—but not so densely packed with information that it cannot be read easily. It should be a useful way for the public to become informed about League issues and about election information. The Web site should be well designed, easily navigable, and updated on a regular basis. Its URL should be short, easy to remember and as widely publicized as possible so that people can find it. LWVUS encourages Leagues, especially those without websites, to use League Easy Web (LEW), created by the LWV of California. It is an easy to use and affordable option. (Additional information about LEW can be [found here](#)).

## E-mail

E-mail is an essential tool for communication among different levels of the League and between members of a given League. It is essential that every League have access to e-mail and that members' e-mail addresses are included in the national League member database so that they will receive regular updates sent out by the national League Board and staff.

## Newsletter

A local League's most basic tool for communicating with its members and the larger community is its newsletter. Every League should name its newsletter *The Voter* and include the League's registered logo on the masthead. The board's role is one of setting overall policy for the content and tone of the newsletter. A good newsletter should be an effective tool for membership involvement and retention; it should convey a sense of enthusiasm about the League's accomplishments and expertise as well as communicate information to both members and the public.

# 8. Voter Services and Public Information

The League's Voter Services and public education activities provide information about public issues, including those on which we have a position. Voter services activities are designed to provide citizens with unbiased, factual information that they can use as a basis for reaching their own decisions.

Over the years, the League has built an excellent reputation for providing the public with accurate, nonpartisan services and information on elections and on governmental and public policy issues. The League's voter services activities are designed to provide citizens with unbiased, factual information that can be used as a basis for understanding

the election process and reaching their own voting decisions. The League's citizen education activities, on the other hand, provide information on public issues, including those on which we have a position; by law and League policy, it is not necessary to present both sides of an issue in such situations. In other words, Leagues may educate the public about a particular point of view or "side" of an issue (e.g, a League could hold a forum about why the death penalty should be abolished without including experts/panelists in support of capital punishment).

It is the responsibility of the board of directors to ensure that voter services activities and lobbying activities are kept clearly separate. Voters' guides and other voter services materials must not contain statements of League positions, and League positions on ballot issues must not be discussed at voter services events. A reader or candidate should not be able to "guess" the League's position based on the wording of a question.

Educational activities may be funded with either operating funds or tax-deductible monies—either through direct sponsorship or through grants. (See below for information about conducting membership recruitment at educational programs and tax considerations.) If tax-deductible monies are used, there are IRS regulations that must be strictly followed. If the event is an election event, then additional regulations from the FEC and FCC (if broadcast) must be followed. Some recommended publications on the legal aspects of voter services work are [\*Face to Face: A Guide to League-Sponsored Debates\*](#) (published by the LWVEF) and *The Rules of the Game* (published by The Alliance for Justice), as well as IRS publications.

## Voter Services

Leagues carry out a variety of election-related services, which may include:

- Making registration and voting information available through a variety of means, including a Web site ([www.VOTE411.org](http://www.VOTE411.org)).
- Organizing voter registration and get-out-the-vote campaigns that target groups that have traditionally not participated in elections.
- Publishing voters' guides/candidate questionnaires, often in foreign languages as well as in English.
- Sponsoring candidate meetings, debates and interviews.
- Providing speakers on election issues, such as voting procedures and ballot measures.

## Candidate Meetings/Debates

Sponsoring candidate debates requires careful decision-making by the whole board to protect the League's nonpartisanship. Leagues are strongly advised to adopt careful, objective candidate participation criteria *before* each election season gets underway and before the candidates are known (e.g., at the League's January board meeting). For example, the League might require evidence that a formal campaign is being waged, i.e., existence of headquarters, campaign staff, issuance of position papers and campaign appearances. Such criteria can then be used to determine which candidates

are eligible to participate in the League's debate, should the League choose not to invite all candidates.

A League may stage a debate even if some invited candidates decline to appear as long as the debate is not televised and more than one candidate for a given office appears. FCC regulations require that a debate sponsor not proceed with a debate unless at least two candidates for the same office appear at the same event. Some states may have comparable requirements for state and local elections. Leagues should refer to the [Guidelines for State and Local Debates including "empty chair" debates](#) (on the League Web site) and the LWVEF publication [Face to Face](#) for step-by-step guidance on legal requirements and technical considerations in staging candidate debates. Sample candidate participation criteria also are available on the League Web site.

## Working with Other Groups or Allied Organizations

In providing voter information, Leagues often work with the media and other organizations that endorse candidates. In deciding how to work with such groups, a League needs to consider carefully how its participation might affect its nonpartisan status or the public's perception of the League's nonpartisanship. The board must make sure that the ground rules are set to ensure that the activity is conducted in a strictly nonpartisan manner. It also is important to make clear that the League cannot waive its nonpartisan policy or any procedures that ensure fair treatment of candidates. The same is true when a League cooperates with a newspaper or other media outlet to produce or distribute election information. Guidelines for broadcast events should include a prohibition on airing selected portions of the event by either the candidates or the media.

## Public Information

### Observer Corps

Observer Corps are a structured way for individuals to exercise their right to know. They provide a valuable service to the community. They help ensure that citizens are aware of the decisions that impact their lives and they promote government transparency and accountability.

An observer is an individual who attends a governmental meeting, notes what happens at the meeting, and reports back to the League and through the League to the community. By attending public meetings of local governmental bodies/agencies, observers learn more about what their government is doing. They learn about the issues facing their community and are empowered to take action, if warranted. They also learn *how* issues are being addressed.

Observers keep elected and appointed officials on notice; they let them know that someone is watching what decisions are being made and how they are being made. They help ensure that the issues facing their community are being handled "in the sunshine," in the open. Ideally, observers are monitoring both the issues being discussed as well as the process by which they are being discussed. While not every item up for discussion will relate to a League's priorities, ensuring that the meeting is being conducted in an open

and acceptable way is critical to all of the League's efforts and the health of our democracy.

Observer programs are *not* vehicles for individuals to work personal or partisan agendas. Observers generally do not “act” on issues in these meetings unless serving as a designated spokesperson for the League, observers should not provide commentary or testimony on issues on behalf of the League. Instead, observers attend meetings to gather information. Through the process, their presence encourages better, more transparent government.

## Public Education Year-Round

Public education encompasses all of the other issue-related or process-related activities that Leagues undertake to help members and the public understand and participate in government and politics.

For example, the League can sponsor or cosponsor meetings on government operations, the political process, or a hot issue in the community or it can join with educational or academic bodies in organizing and running high school, college or adult education programs. It can work alone or with other groups to explore an issue or to provide political know-how about testifying, petitioning, or any other technique for getting something done in the community. It can also present educational forums about issues on which the League has a position, provided that the discussions focus on issues of concern rather than the merits of specific pieces of legislation, no lobbying takes place and no call to action is issued. These events are good times to include membership, media and fundraising components.

## Financial Considerations

As a general rule, voter services and citizen education events can be funded using tax-deductible monies. However, the safest and most flexible way to structure such events is for a League to host the event in its own name but to fund the event, in whole or in part, with a grant from an education fund. Those who attend then may (and should) be actively solicited for membership and for contributions. Membership brochures may be distributed—but remember that grant monies may not be used to pay for them; the grant from the education fund must be restricted to the costs of providing the educational content. One more advantage of the League hosting the event is that the League itself will then own the list of attendees, who can be solicited for membership and support.

The same principle applies to voters' guides. If a printed voters' guide is funded using tax-deductible monies, then any “ad” promoting League membership must be funded through the League's general operating funds.

(Further [education fund information](#) that includes fiscal compliance, IRS Guidelines and how to use tax-deductible monies to fund voter services/citizen education events and activities is available on the League Web site.)

## 9. Overview of Program

The League's program consists of those governmental issues that the League has chosen for concerted study and action at the national, state or local level. The program process is specified in the bylaws and includes the following steps:

- Formal adoption (by members at an annual meeting or by state/national convention delegates) of an issue for study.
- Member study and agreement on broad concepts.
- Formulation of a position by the appropriate board of directors.
- Action as directed by the board of directors.
- Annual or biennial re-adoption of the position.

Local Leagues may work simultaneously on local, state, national and (if applicable) regional program issues, but action may be taken only in those areas where there is member understanding and agreement. Issues reflect community concerns and range from local park facilities to election reform, from childcare to nuclear waste disposal, from air pollution to international trade, from mental health to energy policy. (The national League's positions on issues can be found in [Impact on Issues](#) on the League Web site.)

### Studies and Program Adoption

League program arises from the suggestions of members. At every level of the League, the board of directors is responsible for reviewing and discussing these suggestions, formulating them in appropriate language, and recommending all or some of them for adoption according to procedures specified in the bylaws. A local League's "action" or advocacy program is determined by members at its annual meeting; state and national programs are voted upon by delegates at state and national League conventions. In the course of the program adoption discussion, members often give suggestions to the board on scope of inquiry, timing, emphasis and ways to handle the study and/or action phases. ("How to do a study" is available in the [Action Chair toolbox](#) on the LWVUS website.)

### Reaching Member Agreement

Before the League can take action, members must agree in broad terms on what they think about various aspects of the policy issue. The nature of the issue will affect how it is studied and how positions are reached. The board usually selects the method to be used: consensus (where agreement is reached using League responses to specific questions) or concurrence (where agreement or a vote on a pre-stated position is required).

The technique most often used in the League for reaching member agreement is consensus by group discussion. It is not a simple majority, nor is it unanimity; rather it is the *overall sense of the group* as expressed through the exchange of ideas and opinions, whether in a meeting of the full membership or a series of smaller discussion meetings.

Regardless of the method used, it is essential that members have an opportunity to become informed before being asked to make decisions on the issue under consideration. It is through this process that League members become educated on a given issue, and this is what makes subsequent League action on that issue uniquely credible and respected. During the study phase, members have an opportunity to examine the facts and key pro/con points. They are encouraged to discuss the political realities of action and to contribute ideas for the board to consider when it formulates an action strategy after a position is reached. If the League has a position on a given issue, action can be taken as appropriate. The issue does not need to be studied each time action is thought to be necessary.

## Formulating League Positions

A League's position reflects membership understanding and agreement on a particular public policy issue. In formulating a position, either prior to seeking member agreement through concurrence or following member agreement through consensus, the board must keep in mind the importance of wording the position in terms broad enough to enable the League to initiate, support or oppose a variety of specific legislative and executive proposals over a period of time.

Determining whether consensus has been achieved and how it should be expressed is the responsibility of the board. Through an interpretive process, the board first evaluates the reports of member views and then determines the broad areas of agreement and disagreement that emerge.

Once a League board has finalized a position on an issue, it is announced to members and can be shared with the public. It becomes part of the League's position statements, and the board can begin taking action on it immediately. Like all statements of position, it must be readopted each year by League members at the annual meeting (or biennial convention) in order to remain on the program of issues for possible action.

A local League's views during a regional, state or national study do not constitute a final League position and should not be publicized, either to members or to the public. In this case, each local board's responsibility is to report its members' areas of agreement and its level of member participation to the regional, state or national board. In turn, the appropriate board analyzes the member agreement reports from local Leagues, develops a position statement that reflects member thinking and announces the position to members and the public. That position is then available immediately to be used as the basis for action.

## *Impact on Issues*

The publication *Impact on Issues: A Guide to Public Policy Positions*, contains all LWVUS positions agreed to through study, consensus and concurrence. It provides invaluable information and history for Leagues wishing to take action. National positions can serve as the basis for action at the state and local levels, as well as nationally. You may wish to contact the LWVUS for assistance in applying national positions locally or in your state. (Hard copies of *Impact on Issues* are available for purchase through the LWVUS store on the League Web site, or an electronic copy can be downloaded from the [Leaders section](#) of the Web site. Most state and local Leagues will also have a publication that shares state and local positions on the issues)

## The League's Principles

In addition to positions on public policy issues, *Impact on Issues* lists the League's Principles. These are broad "concepts of government" to which the League subscribes. They can serve as a basis for support for: responsible, responsive, efficient, representative government; protection of the right to vote of every citizen; support for free public education; and international cooperation, for example. However, since they are broadly worded, caution should be used in applying them to specific issues.

## Key Points of the Study Process – Local Leagues and Members:

It is important to remember that the study process is a cooperative effort between the local League board and the study committee. It is the board's responsibility to monitor the entire process to ensure that the membership is able to come to consensus in an unbiased and nonpartisan atmosphere. ("How to do a study" is available in the [Action Chair toolbox](#) on the LWVUS website.)

# 10. League Advocacy

League advocacy is based on member study and agreement on selected issues and involves concerted efforts to achieve public policies consistent with League positions. League lobbying promotes or opposes specific pieces of legislation. The LWVUS public policy positions are the official statements of position for each program area and reflect the program adopted by the most recent national Convention

## Working Together to Influence Public Policy

The process used in formulating positions and in taking action at the grassroots level makes the League unique and sets the League apart from other organizations. The fact that we are members not only of a local League, but of a state League and of the League of Women Voters of the United States as well, makes us a powerful force.

Effective lobbying on national program issues relies on a partnership among all League levels—lobbying in Washington, DC, and constituent lobbying at home. This one-two

punch gives the League a special impact in influencing national legislation.

**Lobbying activities and voter services activities must be kept completely separate, and voters' guides and other voter services materials and publications must not contain statements of League positions.**

## Advocacy vs. Lobbying

Advocacy is a broader concept than lobbying. While lobbying can be part of an advocacy strategy, advocacy does not necessarily include lobbying. Lobbying is defined as an attempt to influence specific legislation, both legislation that has already been introduced in a legislative body and specific legislative proposals that the League or others may either oppose or support. Lobbying includes action that transmits a point of view on a specific piece of legislation to elected officials or their staffs, as well as action urging the public to contact their legislators about a specific piece of legislation. Lobbying activities must be funded through general operating funds (501(c)4).

Advocacy activities, on the other hand, can sometimes be funded with tax-deductible monies. This is the case even when only one side of an issue is presented, as long as no call to action on a particular piece of legislation is issued. Such activities can include: (1) developing public policy briefs that analyze issues and provide detailed information and recommendations for addressing them through specific reforms and (2) providing forums for discussing issues and educating policymakers and the public.

## LWVUS Lobbying

In DC, the LWVUS president and staff testify on Capitol Hill and lobby Members of Congress through phone calls and office meetings. The LWVUS frames the substantive issues and develops political strategies, targets key Members of Congress and implements lobbying activities. Day-to-day lobbying of Members of Congress, their staffs and congressional committees is carried out by the League's professional staff lobbyists. At the direction of the LWVUS, the League's volunteer Lobby Corps of about 20 DC-area League members lobbies each month when Congress is in session.

While it is the job of the national board to take the lead in national action and to keep League action synchronized, national legislation is every League's and every member's business. Lobbying in DC is highly important, but direct lobbying of Members of Congress by their constituents often is the key to persuading them to adopt the League position. Many League members belong to the national League's Grassroots Lobby Corps. This online network of activists gets the League message to Congress in a highly effective way. Members of the network receive e-mail action alerts from the LWVUS and then respond by sending quick, targeted, and sometimes last-minute, messages to Members of Congress on priority issues before key votes. Any League or individual League member interested in lobbying Congress on LWVUS positions is encouraged to join the Grassroots Lobby Corps by going to the League Web site.

The LWVUS Bylaws provide that Leagues may act on national legislative issues only in conformity with positions taken by the LWVUS (see *Impact on Issues*). This helps to

ensure that the League speaks with one voice, which is essential for our effectiveness as an advocacy organization. A League board may choose not to respond to a particular call to action, but it may not take action in opposition to a position articulated by the LWVUS. Similarly, state Leagues are responsible for determining action policies and strategies on state issues and ensuring that the League's message is consistent throughout the state.

It sometimes happens that a local or state League may want to take action at the federal level on an issue that is not currently an LWVUS priority. In this case, consultation with the LWVUS staff is required. After consulting with the LWVUS, a League may only lobby their own Members of Congress—and Senators, in the case of a state League. It is never appropriate for a League to lobby another League's Members of Congress. (See the *President's Packet* for more information about taking action at the federal level.)

## Taking Action in the Community

Interpretation of a League position is the responsibility of the board that oversees that position. Local League boards are responsible for interpreting their own positions before taking action. Similarly, the LWVUS board interprets national positions, and state League boards interpret their own state positions. Uniform interpretation is essential for the League's effectiveness.

A local League contemplating action on a community issue should consider the following:

- Does the League have a position that supports the proposed action?
- Do members understand and would they agree with the proposed action?
- Is it a priority for the League?
- Does the League have a unique role to play or would the League's assets (time and money) be better spent on other activities?
- Does it have some chance of success or make an important statement for the League?
- Are other organizations or a coalition already working on the issue?
- What action techniques would be most effective?
- How will the League deal with controversy?
- How can members be involved in the proposed action?
- What kind of community involvement would best support the League's efforts?

A local/state League may want to take action by using a national League position at the local/state level (i.e., not lobbying Members of Congress or the state legislature). If the local/state League board judges that its members are knowledgeable and support the action to be taken, it can act without clearance from the LWVUS board. Leagues may wish to consult with the LWVUS Board or staff for background on action previously taken at all levels of the League based on a particular position. Most state Leagues also do not require clearance for state positions to be used locally.

League members should be encouraged as individuals to contact their legislators regarding League priority issues. Members, of course, are always free to take action on any topic, as long as it is clear that they are speaking as individuals, not for the League (i.e., they should not mention that they are League members in their communications). It is important to remember that only the League president (or designee) speaks in the name of the League.

## Speaking with One Voice

“Speaking with one voice” is one of the most important tenets of the League. The national League is responsible for determining strategies and action policies that ensure that the League’s message on national issues is consistent throughout the country. Similarly, state Leagues are responsible for a consistent state message, and local Leagues must cooperate to ensure that regional issues are addressed in a consistent matter by neighboring Leagues.

Only the president (or designee) is permitted to speak for the League in an official capacity. However, members are encouraged to take action on League topics as individuals. For example, when responding to an LWVUS Action Alert, a local League president would send a message on behalf of the organization (i.e. on League letterhead); members might contact the same official as individuals (i.e., not mentioning their affiliation with League).

## 11. Conclusion

Being a League leader is rewarding and challenging. League leaders across the country enthusiastically share stories of their experiences and personal growth, recounting unique and exciting opportunities that only leadership in the League provides. They are proud of the positive impact that the League has on community, state and national issues and their role in facilitating the League’s activities.

The LWVUS Board and staff are ready to assist Leagues in their efforts to make their communities healthy, strong and vibrant. Board liaisons and national staff can be contacted via e-mail or phone. Contact information is available in the For Members section of the League Web site.

# 12. Appendices

## APPENDIX I

### Glossary of League Lingo

There are certain terms that are unique to the League of Women Voters- "League Lingo." Some are listed here to help new members.

**ACTION:** Promoting the League's positions on local, state and national public policy issues to government officials, the media and the public.

**ACTION ALERT:** Request from the LWVUS or state League to take action in support of a League position.

**ANNUAL MEETING:** Local year-end business meeting to elect officers and directors, vote on bylaw changes and adopt a budget and program of work for the next year.

**ASSOCIATE MEMBER:** A non-voting member of the League, such as a person under 18 years of age or a non-citizen.

**CONSENSUS:** Collective opinion of a substantial number of League members, representative of the membership as a whole, after objective study of an issue.

**CONCURRENCE:** Agreement by League members with a position on an issue reached by a small group of members or by another League.

**CONVENTION:** A state or national League meeting held every other year at which delegates elect officers and directors for the biennium, adopt program, make bylaw changes and adopt a budget, usually for one year. Local Leagues send delegates to state convention, local and state Leagues send delegates to national convention.

**COUNCIL:** An assembly of delegates held in alternate years to adopt a budget and assess program developments. Local Leagues send delegates to state council, state Leagues send delegates to national council.

**EDUCATION FUND:** The tax-deductible arm of national, state and large local Leagues, handling funds to be used only for educational purposes, not for action on issues.

**LIFE MEMBER:** A person who has been a member for 50 years or more. Life members are excused from dues payment and their Leagues pay no per member payment (PMP) for them.

**ILO:** Acronym for an Inter-League Organization, formed by local Leagues within a county, metropolitan area or region to act on issues that are beyond the local League area in scope.

**MAL:** Acronym for Member-At-Large, a member who resides outside the area of, and is not enrolled in, a local League.

**MAL UNIT:** A state-recognized group of Members-At-Large, in an area where there is no local League.

**PMP:** Acronym for Per Member Payment, the amount of money paid to the LWVUS and the state League

on behalf of each member.

**POSITION:** A statement of the League's point of view on an issue, arrived at through member study and agreement (consensus or concurrence), approved by the appropriate board and used as a basis for League action.

**PRINCIPLES:** Governmental standards and policies supported by the League as a whole. They constitute the authorization for adoption of program at all levels.

**PROGRAM:** Selected governmental issues chosen by members at the local, state and national levels for study and action.

**PROGRAMS:** Plans for speakers, discussion or other activities for League meetings.

**UNIT:** Groupings of members within large local Leagues to provide more opportunity for discussion. Units may be time-oriented (day, evening, lunch hour), geographically oriented, or both.

**VOTERS GUIDE:** Nonpartisan publication giving candidates' qualifications and positions on selected issues.

**VOTERS SERVICE:** Year-round activity to help citizens be politically effective and to encourage their participation in the political process. Registering voters and presenting factual, nonpartisan information on candidates and election issues are basic voters service activities.

**VOTING MEMBERS:** All League members who are U.S. citizens and at least 18 years old.

**WEEKLY LEADERS UPDATE:** A LWVUS electronic mailing to all League board members sent out weekly. It includes information from the national League on Advocacy issues, Membership and League Support, Education Fund projects and grants and other important items of interest to League leaders.

## **APPENDIX II**

### **APPENDICES FOR LEAGUE BASICS (full download – available on web):**

#### **Additional Resources - Bylaws**

- A: Amending Bylaws
- B: Decision Making By Electronic Means
- C: Sample Local Leagues Bylaws

#### **Additional Resources - Governance Policies**

- D: Developing and Implementing a Diversity Policy (Sample Included)
- E: Developing and Implementing a Nonpartisan Policy
- F: Nonpartisan Political Activity Policy
- G: Sample Local League Nonpartisan Policy
- H: Samples of Conflict of Interest Policy

#### **Additional Resources - Board of Directors**

- I: Job Descriptions for Local League Officers
- J: League Management Models
- K: Board Orientation
- L: Local Board Meeting Basics
- M: Tips for Successful Meetings
- N: Tips for Successful Annual Meeting

#### **Additional Resources - Financial Procedures**

- O: Fiscal and Compliance Issues FAQ
- P: Money Matters Part 1 - Financial Management
- Q: Money Matters Part 2 - Using Your Education Funds

#### **Additional Resources - Membership**

- R: 7 Keys to Grow Your League Membership
- S: Tips for the Membership Chair
- T: Tips for the Membership Growth

#### **Additional Resources - Communications**

- U: Basics for Writing on the Web

#### **Additional Resources: Advocacy**

- V; League Principles
- W: Legislative Action: Working Together to Influence Public Policy

#### **Additional Resources: Education**

- X: LWVEF Guidelines For State And Local League Debates Including “Empty Chair” Debates

Y: Tips for Voters Service chair  
Z: Key points for a League study

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