



**NEW LEADERS
BOOT CAMP
WORKSHOP*
HANDBOOK**

*Held at the LWVMI Convention, May, 2023

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WELCOME TO THE

NEW LEADERS BOOT CAMP HANDBOOK

Welcome to the *New Leaders Boot Camp Handbook*. It's designed to support those who are new to leadership positions in their local Leagues with important facts, resources, and helpful suggestions from League leaders who have shared their expertise and experience.

The 2023 LWVMI Convention featured a workshop session called New Leaders Boot Camp. This handbook is a compilation of information provided during the workshop, plus additional materials, and resources, with each section prepared by the topic presenter.

There is a page with sources of information that will be helpful to all leaders. There are also sections devoted to specific topics. New leaders are encouraged to review all topics, since many topics will affect everyone who is serving on their local board. For example, all board members should be familiar with the content of the *Communications* section. *Advocacy* is another topic that all board members should be familiar with.

Everyone will find the last segment, *Suggestions for Newly Developing Leagues*, helpful. All Leagues should be continually developing, and board members are the leaders in this process.

There is a page of contact information for workshop presenters. They are all very willing to share their expertise and experience, so email them if you have questions.

If a topic of interest hasn't been included, contact the LWVMI board for information. A list of board members and their areas of responsibility is on the LWVMI website at lwvmi.org/board-of-directors/.

INFORMATION FOR ALL LEADERS

Resources for League Operation and Management

LWVUS LEAGUE MANAGEMENT site has information about the Making Democracy Work agenda, communications, operations and governance, a calendar of upcoming events and trainings, and a full library of other resources and tools available on the site.

<https://www.lwv.org/league-management>

LEAGUE UPDATE NEWSLETTER sent by-weekly by LWVMI to all state and local League presidents, and other engaged League leaders who sign up. It includes important information about grant opportunities, communications resources like graphics and talking points, information about upcoming webinars and trainings, and much more.

<https://www.lwv.org/league-management/league-update-newsletter-sign>

LWVMI MEMBERS SECTION on the LWVMI website has state resources for local Leagues. It includes: a calendar of League events, LWVMI Operations, voter service tools, advocacy tools, miscellaneous League resources, League Links newsletters and women's suffrage resources.

<https://lwvmi.org/members/>

LEAGUE BASICS contains essential policy and organizational information for local Leagues. It contains advice, guidelines, and some detailed information to help leaders develop methods of operation to enable a League to accomplish its goals. Available on the LWVUS website.

<https://www.lwv.org/league-management/league-fundamentals/league-basics>

LEAGUE LINGO is a glossary of terms unique to the League of Women Voters. On pages 23 and 24 of League basics.

LEAGUE AND MEMBER RIGHTS AND RESONSIBILITIES

From LWVUS: As you are aware, the LWVUS Governance Committee has been developing League and Member Rights & Responsibilities Policies over the past year.

Our field of Leagues has long asked for written definitions of what it means to be a League and what it means to be a League member. After years of research, legal review, professional consultation, and LWV member input, the LWVUS Board approved the final policies at their spring meeting at the end of April.

LWVUS League Management site. <https://www.lwv.org/league-management>. Search League Responsibilities Policy and Member Rights and Responsibilities Policy.

For more information: Camilla Davis, cdavis.lwvmi@gmail.com

COMMUNICATIONS

LWVMI Communications Committee

A new committee was formed in March 2022. Currently we have 10 members, including the LWVMI co-presidents, who are experts in advocacy, social media, LWVMI Webpage, graphics, and audio/visual technology. We meet monthly and report to the LWVMI Board of Directors.

Our role is to provide support and guidance to League members for communicating with the public and encourage communications between local members.

Communications Guidelines – Handbook available on the LWVMI website for all your communication needs.

- Local League Website Management
- League Approved Logos/Templates/Graphics
- Social Media Best Practices
- Presentations/Videos
- Narrators' Bureau
- Filming/Recording Waivers, Release Forms
- Letters To the Editor
- Opinion Editorials (Op-ed)
- Press Releases
- Flyers, Posters
- Disinformation
- Guides To Verifying Sources/Information

The Local League Communications Network is made up of League members throughout Michigan who have a role or an interest in messaging. Currently there are 31 members, representing 18 Leagues in MI. Every League in Michigan is encouraged to have at least one member in this Network. It's a great way to get to know each other and share information.

For more information: Kathy Poore, kpoores@wowway.com

INFORMATION FOR PRESIDENTS

IMPORTANT BASIC INFORMATION

- ✓ Know your board members and their areas of responsibility.
- ✓ Access your League's email account. If your League doesn't have one, set one up.
- ✓ Know your League's social media accounts. Review their content.
- ✓ Know your League's mailing address. Set up a PO box, if necessary.
- ✓ Have your board members sign the conflict-of-interest policy.
- ✓ Have your board members sign the nonpartisan policy.
- ✓ Ensure that those in higher or visible leadership positions do not endorse or contribute to political campaigns.

FINANCIAL FACTS

- ✓ Know the difference between C3 and C4.
- ✓ Know that PMP means Per Member Payment.
- ✓ Review your League's financial position and its plan for sustainability and carrying out the League's mission.
- ✓ Add your signature to your League's bank account.
- ✓ Discuss the option of Directors & Officers Liability Insurance with your board.
- ✓ Record your League's EIN Number.

VOTER SERVICE

- ✓ Work with your Voter Service Director to learn more about local elections, election officials, and election laws.
- ✓ Know what services your League offers for voter registration drives. You will get calls.
- ✓ Know what voter education services your League offers.
- ✓ Learn the steps to hold a candidate forum.
- ✓ Be familiar with VOTE 411 – know what information voters can find.
- ✓ Participate in voter service activities whenever possible.

MEMBERSHIP

- ✓ Review your League's plan for growing, developing, and retaining membership through the DEI lens.

- ✓ Know the calendar items your board has scheduled (Observer Corps activities, Voter Service Activities, informational meetings, and programs, etc.)
- ✓ Learn what information is available in your League's database and get access so you can look at it.
- ✓ Know the difference between Geographic Units, Member-at-Large State Units, and Independent Leagues.

COMMUNICATIONS

- ✓ Review your League's social media platforms. Know who is responsible for posting. Get posting access for yourself.
- ✓ Review your League's newsletters. Ask to see newsletters before they are sent.
- ✓ Review your League's website and know who is responsible for posting on it.

ADVOCACY

- ✓ Know the protocols local Leagues must follow as it relates to advocacy positions.
- ✓ Know where to find your local League's positions, LWVMI positions (<https://lwvmi.org/lwvmi-positions/>) and LWVUS positions (<https://www.lwv.org/impact-issues>).
- ✓ For more information about Advocacy, see the Advocacy section of this Handbook.

GET HELP WHEN YOU NEED IT!

- ✓ LWVMI's Membership and Leadership Development committee offers support for League leaders. Contact the LWVMI Vice President for Membership about connecting with a coach to help guide you in your new role.

For more information contact: Camilla Davis at cdavis.lwvmi@gmail.com

INFORMATION FOR TREASURERS

League of Women Voters of Michigan GUIDE TO FINANCIAL POLICIES & PROCEDURES

Sound financial policies and procedures increase the likelihood that:

- Financial information is reliable.
- Assets and records are not stolen, misused, or destroyed.
- Policies, laws, and regulations are followed.

What “internal controls” on finances should a policies and procedures document address?

- Authorization and approval
- Proper documentation
- Physical and computer security
- Early detection

Authorization and approval:

- Segregation of duties – ideally, the same person should NOT:
 - Deposit funds AND record deposits
 - Write checks AND receive and reconcile bank statements.

Income--proper documentation:

- Open the mail **promptly**.
- Record, copy and endorse checks upon receipt.
- Prepare deposit and deliver to bank **promptly**.
- Deposit all cash received (don't use cash received to pay bills or replenish petty cash).
- Reconcile income with deposits.

Expenditures—proper documentation:

- Board authorizes check signers.
- Require more than one signature for checks over a certain amount.
- Obtain approval for each transaction, either through the budget or through the board.
- Provide and maintain documentation for each check written.

Physical and computer security measures:

- Checks:
 - Pre-number checks.
 - Secure blank checks with a lock.
 - Limit access to blank checks to authorized person(s).

- Computer records
 - Limit access and protect with passwords.
 - BACK UP records on a regular basis.
 - Store backups securely at another location/in the cloud.

Annual financial review--early detection:

- A financially astute person who is not part of the financial team reviews financial records
- Reviewer follows LWVMI financial review procedure.

**League of Women Voters of Michigan
FINANCIAL REVIEW PROCEDURE**

1. Bank statements

- Check recorded receipts against the deposits on bank statements.
- Investigate discrepancies.
- Verify bank reconciliations.
- Account for all checks by number.

2. Dues

- Check dues collected during the year against the current membership total.
- Investigate discrepancies (life members, scholarships, discounted student members).

3. Vouchers

- Check records against vouchers.
- Are expenses backed by an invoice or voucher?
- Are items debited to the proper account?

4. Budget

- Compare income and expenses with budget.

5. Education Fund Account with LWVUS (if applicable)

- Compare deposits of tax-deductible funds with the records of LWVUS Ed Fund.
- Check transactions with the LWVUS Ed Fund.

6. Sample Month

- Verify income and expense totals.
- Verify individual categories.
- Check beginning balance and ending balance.
- Make necessary adjustments.

7. Return to bank statements.

- Check beginning and ending balances in each account.
- Make necessary adjustments.

8. Prepare report.

- "We/I have reviewed the books of the League of Women Voters of _____ as of _____, examined the records of revenue and expenditures and traced beginning and ending cash balances to bank statements. The books are an accurate reflection of the financial condition of the League of Women Voters of _____ as of _____ and the results of its operations and cash flows for the year."
- Sign statement.

League of Women Voters of Michigan YOU JUST BECAME TREASURER FOR YOUR LOCAL LEAGUE

- A. Find out which financial institutions your League uses. Work with the past president and past treasurer to add your name on all accounts. This usually involves going to the bank in person and filling out a form. Make sure you know the process for obtaining the regular bank statements.
- B. Check with the past treasurer about any policies regarding the responsibilities of the treasurer, i.e., some Leagues require two signatures for checks over a certain amount.
- C. Talk to the president and membership director to understand how money will come to you for deposit. Ask if membership checks are sent to you, or if someone else gives you the checks for deposit. Find out if your local League uses an online payment system (i.e., PayPal) and how to use it.
- D. League of Women Voters of Michigan sends checks and bills to the local League presidents. Make sure you have a system to get that material from your local League president.
- E. Find out if there are bills that can be paid routinely, and if there are bills that have to be approved by the board. Ask how you will know when it is appropriate to pay bills requiring board approval.

- F. Check the balance according to the last bank statement against your records at least monthly, and make sure the statement and your records match. If not, talk to others to get the information needed for them to reconcile.
- G. Learn whether your local League has a separate organization to receive donations to an education fund, or if your local League uses the LWVUS Education Fund.
- H. Ask the current president if the format and frequency of previous treasurer's reports are sufficient for review at each board meeting. Prepare reports that meet the needs of the board.
- I. At the end of the fiscal year for your local League, set up a peer financial review to assure the accuracy of the books and record-keeping system.
- J. Use the attached calendar to ensure you file important documents in a timely manner, including the E-file 990N postcard for the IRS, payments for Per Member Payment (PMP) to LWVUS and LWVMI, and annual financial reports for LWVMI.

League of Women Voters of Michigan
LOCAL LEAGUE TREASURER RESPONSIBILITIES BY MONTH

Monthly	Receive and deposit any income; pay bills that are submitted & approved Document revenue and expenses Reconcile bank statements Prepare and distribute financial reports for board meetings
July	Close out books for previous fiscal year; by 8/1 send to LWVMI: year-end revenue & expenses, net assets, proof of having filed 990 N by Nov. 15. Arrange for a peer financial review of financial records for the year Pay initial PMP payments to National and State League (can be paid quarterly, July, October, January, and April) Pay general liability insurance fee to State League (included in bill for PMP)
August	Work with membership chair on dues collection, according to your League's practices (annual or rolling collection) Pay LWV of Lake Michigan Region dues, as applicable
September	--
October	Pay second installment of PMP
November	E-file 990-N (postcard) with IRS by Nov. 15 (for fiscal year July 1-June 30)
January	Pay third installment of PMP
February	Work with budget committee to develop proposed budget for next year
March	Present budget to local board for approval. Publish to membership.
April	Pay final installment of PMP
May	Present financial report and proposed budget at local League's annual meeting Pay LWVMI for Directors & Officers liability insurance, if opting in
June	Receive insurance bill from State League

League of Women Voters of Michigan INSURANCE OVERVIEW

REQUIRED FOR LOCAL LEAGUES GENERAL LIABILITY INSURANCE

LWVMI carries General Liability insurance on behalf of itself and local leagues. All local Leagues must participate and thus do not need to carry their own liability insurance. Liability insurance is required because every League has the risk of a lawsuit in case of an injury or fall at any of its meetings or events.

Cost for this coverage is \$0.90 per member. The total amount is based on the number of members a local League reports to LWVUS at the end of January. LWVMI adds the charge to each local League's bill for annual Per Member Payment (PMP) to LWVMI.

The General Liability insurance policy covers all local members and local Leagues against claims by others. It is a comprehensive liability policy and covers, but is not limited to, the following situations:

BODILY INJURY AND PROPERTY DAMAGE LIABILITY (limit \$1,000,000)

PERSONAL INJURY OR ADVERTISING INJURY (limit \$1,000,000)

FIRE DAMAGE (limit \$100,000)

MEDICAL PAYMENTS (limit \$5,000)

LITIGATION COSTS

If a local League is sued, the insurance company covers all costs of defending the suit.

CLAIMS

In the event of an incident that might lead to a claim, no member or employee of the LWV should admit to any liability. The LWV member or employee should secure as many facts as possible and **immediately contact** the LWVMI office or President, who will then notify the insurance agent.

SPECIAL SITUATIONS

A local League may be asked by the city or the owner of a facility to provide an insurance rider for an event in addition to LWVMI's General Liability

policy. Note: A rider is different from providing proof of General Liability Insurance. If a rider is needed, the local League must call the LWVMI office at 517-484-5383 or email office@lwvmi.org as far in advance as possible. LWVMI will then apply to the insurance agent for the rider. LWVMI needs the date, time, and place of the local League event. The cost to the local League is \$100.

OPTIONAL FOR LOCAL LEAGUES
EXECUTIVE LIABILITY OR DIRECTORS & OFFICERS LIABILITY
INSURANCE

LWVMI carries Directors and Officers (D&O) Liability Insurance to cover decisions made by the LWVMI Board of Directors (limit \$1,000,000). Prudent nonprofit organizations carry this coverage to protect their volunteer boards.

Local Leagues may participate in LWVMI's D&O Liability Insurance for \$100 per year. Participation means each local League's board is covered by LWVMI's \$1,000,000 policy.

In 2022, all local Leagues in Michigan chose to participate, which speaks well of the Michigan Leagues!

A local League may discontinue coverage at any time by providing notice and a signed Cancellation Request Form.

Local Leagues that wish to continue their participation in the LWVMI D&O policy will need to pay the fee when they receive an invoice in May or June 2023.

League of Women Voters of Michigan IRS Status & Obligations of Local Leagues

➤ **Nonprofit and Tax Exempt Status**

Local Leagues in Michigan derive their nonprofit and tax exempt status from the LWV of Michigan. The LWVMI is incorporated as a nonprofit with the State of Michigan, and has 501c4 tax exempt status from the federal Internal Revenue Service (IRS). LWVMI has a group exemption, which allows it to share its 501c4 tax exempt status with local Leagues, which are LWVMI's "affiliates" or "subordinates." For local Leagues to maintain their tax exempt status, each must annually e-file IRS Form 990-N (see below for details). Each Local League has its own EIN (Employer Identification Number). LWVMI must apply for an EIN for any new Local League.

Three local Leagues (Dearborn-Dearborn Heights, Grosse Pointe, Kalamazoo) have Education Funds that are incorporated with the State of Michigan and have the type of IRS tax exempt status called 501c3. LWV Grosse Pointe in 2019 opted to operate entirely from its 501c3 organization. The State League also has a separate Education Fund incorporated with the State of Michigan as a nonprofit organization and with 501c3 status. These are separate from LWVMI and its affiliates (local Leagues).

What is the difference between 501c3 and 501c4 nonprofit status with the IRS?

- 501c3 status is for organizations whose primary purpose is charitable, religious, educational, scientific, or literary. 501c3s may not endorse or donate to political candidates but may engage in some lobbying. * For organizations with annual expenditures of \$500,000 or less, the limit is up to 20% of the organization's expenditures. Dues and donations to these organizations are tax deductible on one's federal tax return.
- 501c4 status is for social welfare organizations and local associations of employees. A 501c4 may endorse and donate to political candidates** and engage in lobbying* to achieve its social welfare purpose. Neither dues nor donations to these organizations are tax deductible on one's federal tax return.

*Lobbying as defined by the IRS means an organization communicating with government officials or employees—or asking for such communication by members of the organization or the general public--with regard to bills, acts, resolutions, ballot measures or the like.

**The IRS allows 501c4s to endorse and donate to political candidates.

Note that the League of Women Voters is a nonpartisan organization, meaning it neither endorses nor donates to political candidates or parties.

Can local Leagues without a separate 501c3 Education Fund accept donations that are deductible on donors' federal tax returns?

Yes, LWVUS (National) has an Education Fund that accepts donations on behalf of local Leagues. The LWVUS Education Fund then awards ("grants") the donated funds to the local League upon request by the specific local League to reimburse qualified expenditures.

➤ **Required Filing with the IRS: Form 990-N**

Local Leagues are required to e-file IRS Form 990-N annually by November 15. This form is for tax-exempt organizations whose [gross receipts](#) are [normally \\$50,000 or less](#).

About filing

- The Form 990-N electronic-filing system moved from Urban Institute's website to IRS.gov in February 2016. All filers must register at IRS.gov prior to filing their next Form 990-N. This is a one-time registration; you won't be asked to register again when filing next year.
- Form 990-N must be completed and filed electronically. There is no paper form.
- Use the Form 990-N Electronic Filing System (e-Postcard) [User Guide](#) while registering and filing.
- For filing system and website issues, see [How to File: Frequently Asked Questions](#). If site issues are unresolved, call TE/GE Customer Accounts Services at 877-829-5500. A representative will file your Form 990-N information.
- Organizations should continue efforts to file, even if late.

Form 990-N filing due date

Form 990-N is due every year by the 15th day of the 5th month after the close of your [tax year](#). You cannot file the *e-Postcard* until after your tax year ends.

Example: If your tax year ended on June 30, the *e-Postcard* is due November 15 of the same year. If the due date falls on a Saturday, Sunday, or legal holiday, the due date is the next business day.

If your 990-N is late, the IRS will send a reminder notice to the last address it received.

Penalty

While there is no penalty assessment for filing Form 990-N late, organizations that fail to file required Forms 990, 990-EZ or 990-N for three consecutive years will [automatically lose their tax-exempt status](#). Revocation of the organization's tax-exempt status will happen on the filing due date of the third consecutively-missed year.

Information you will need for Form 990-N

1. [Employer identification number](#) (EIN), also known as a Taxpayer Identification Number (TIN).
2. [Tax year](#)
3. Legal name and mailing address
4. Any other names the organization uses
5. Name and address of a principal officer
6. Web site address if the organization has one
7. Confirmation that the organization's annual [gross receipts](#) are \$50,000 or less
8. If applicable, a statement that the organization has terminated or is terminating (going out of business)

Ready to file?

After you have read the information above and the User Guide, use the [Form 990-N Electronic Filing System \(e-Postcard\)](#) page to start the process.

Tip: At the 990-N page, type your League's EIN; hit enter. The name LWVMI comes up. Hit enter again. On the next page the local League's name is shown; hit enter. On the third page enter the local League's address and treasurer's name as the contact person; hit enter to submit the form.

For more information contact: Denise Hartsough at denise.hartsough@gmail.com.

ADVOCACY

TAKING ACTION IN THE LEAGUE

Prepared by LWVMI 2/16/22.

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LWVMI TAKING ACTION

League of Women Voters of Michigan (LWVMI) takes action when it is necessary to contact state officials, i.e., Governor, members of the Michigan House of Representatives or Senate or Directors of state departments.

All LWV action is based on program or positions arrived at by consensus or concurrence among the membership. Local Leagues may ask LWVMI to take action at the state level by submitting a support/oppose form found on the LWVMI website. State positions are available at www.lwvmi.org and LWVUS positions are in Impact on Issues at www.lwv.org.

1. The LWVMI Board receives recommendations from its Advocacy Committee on what action to take on specific proposed bills. The Advocacy Committee recommends action to the LWVMI Board of Directors. See more information on Advocacy Committee.
2. The LWVMI Board of Directors has the responsibility to:
 - Evaluate specific legislation against LWV positions and decide whether or not LWVMI will support or oppose it.
 - Decide the kinds of action which will be most effective.
 - Determine the timing of the action.
 - Notify local leagues and state officials.
3. Action is called for when:
 - The state legislation, ballot issue, or ballot proposal is significant for achieving LWV goals.
 - An effective contribution can be made by LWVMI efforts. Note: LWVMI does not take a stand on every bill, issue or proposal that falls within LWVMI program.
4. Action may involve one or more of the following:
 - Letters and calls to Michigan House of Representatives, Senate members, Governor, or
 - state departments.
 - Testimony before legislative committees or at agency hearings.
 - Press releases, letters to editors, op eds, etc.
 - Contact or work in coalition with other statewide groups for coordinated action.
 - Action alerts to our members urging individual member action.
 - Litigation

5. Local Leagues and members may contact a state official (for example, a state legislator, Secretary of State, Department of Environmental Quality) to advocate on state legislation or policy decisions **only** if they have been authorized to do so by LWVMI. Action Alerts sent to individual League members by LWVMI constitute the required authorization.

This is extremely important so that League Advocacy activities are coordinated, and the League is able to speak with one voice.

League members who are speaking as League members or on behalf of the League may not publicly express views in opposition to League positions.

Article X, Section 3 of the LWVMI Bylaws states: Local LWVs and ILOs may act on state program only in conformity with positions taken by the LWVUS or the LWVMI. *Members may act in the name of the LWVMI or the LWVUS only when authorized by the appropriate board.*

THE ACTION ALERT PROCESS

An Action Alert is a notice from LWVMI board to all LWV members that action is needed on state legislation. The Action Alert usually goes to all local LWV members, but occasionally a "limited" Action Alert is issued to a few LWV members whose legislators serve on a particular committee considering a bill of importance to LWVMI or are key legislators on an issue.

Individual Member Response if there is no Action Alert: Individuals can always advocate as individuals, communicating with legislators as a responsible and informed citizen but they cannot reference LWV membership.

EFFECTIVE LWV ACTION IS TRULY DEPENDENT ON THE INDIVIDUAL MEMBER.

LWVMI ADVOCACY COMMITTEE POLICIES

1. The Advocacy Committee Chair is appointed by the LWVMI Board of Directors. The committee members are recommended and appointed by the Vice President of Advocacy with the approval of the LWVMI Board of Directors.

2. The Advocacy Committee will review legislation and recommend action to the LWVMI Board of Directors. Members and others will use the support/oppose forms on LWVMI's website submitted prior to the meeting.
3. With the approval of the Advocacy Committee chair, members of the Advocacy Committee may attend legislative committees and complete attendance cards representing LWVMI. Following the meeting written reports will be emailed to Advocacy Committee Chair.
4. Members of the Advocacy Committee may help draft testimony or action alerts.
5. Members of the Advocacy Committee may prepare background materials for distribution to local League members after approved by the Advocacy Committee. Authors will be acknowledged in materials. Materials will be distributed to local Leagues by the LWVMI Board of Directors.
6. Testimony will only be presented by President or his/her designee. Advocacy Committee members may help with the preparation of the testimony.
7. Members of the Advocacy Committee may be appointed by the LWVMI Board to represent LWVMI in coalitions or other ad hoc groups. Information about these activities will be shared at the Advocacy Committee meetings.
8. The Advocacy Committee Chair will be responsible for setting meeting dates, preparing an agenda and written minutes of the meeting for the LWVMI Board of Directors.
9. Members of the Advocacy Committee may not do any lobbying, advocating for or against legislation, with members of the state legislature or executive branch, unless designated.
10. The committee will meet monthly prior to the board meeting unless the chair cancels the meeting because there is no business.

LWVMI ADVOCACY POLICY

SETTING LEGISLATIVE PRIORITIES

The LWVMI board adopts annually a set of legislative priorities to guide its advocacy work in the Michigan Legislature. The goals are:

- to enhance the League's effectiveness by concentrating resources on priority issues.
- to build the League's credibility and visibility by projecting a focused and consistent image.
- to ensure that the League has sufficient issue and political expertise to act knowledgeably.
- to enable the League to manage resources effectively.

In setting legislative priorities, the board considers the following:

- Opportunities for the League to make an impact.
- LWVMI strategic plan.
- Member interest.
- Resources available to manage effectively.

The board regularly reviews the legislative priorities and is prepared to make adjustments should new opportunities for effective action emerge.

Requests from Local Leagues for Permission to Act at the State Level

All action at the state level must be authorized by the LWVMI board. This includes any effort aimed at influencing the decision on a state issue, such as communicating with an elected or appointed official, joining a coalition, taking part in a press conference or rally, or writing a letter-to-the-editor. A local League wishing to work in this way must consult with the LWVMI about the intended action.

The process is designed to help make League action as effective as possible, to ensure that the League speaks with one voice, and to coordinate and reinforce the League's advocacy messages. LWVMI board will review the action request to determine that it is consistent with League positions.

Requests for permission to urge other Leagues/members to act on a state issue

The LWVMI has sole responsibility for contacting local Leagues and League members about state issues.

Requests for Endorsement of Initiatives Sponsored by Other Organizations

If the issue is statewide in scope, the LWVMI is the appropriate level to endorse the initiative. If the

LWVMI declines to endorse the initiative, endorsement by local Leagues will not be appropriate.

The LWVMI will endorse such an initiative if:

- the action will further a current LWVMI advocacy priority, and/or
- LWVMI endorsement would enhance an important relationship with the organization making the request,
- resource demands associated with the endorsement are compatible with efforts to achieve current LWVMI advocacy goals, and
- in evaluating the impact of the endorsement on League resources, the LWVMI feels the implications for the state office, the LWVMI board and local Leagues is worth it.

Adopted by LWVMI: 10/6/2011

GUIDELINES FOR LOCAL LEAGUES TO TAKE ACTION

1. Advocacy at the local level using a local position.

Local Leagues can take positions on local issues and contact their local officials on issues that the local League has a position with approval by the local League Board of Directors.

2. Advocacy at the local level using a state position.

If local Leagues want to contact a locally elected official, i.e., the mayor, county commissioner or school board members, state positions may be used. However, the local League cannot act where state legislation is required. Of course, voter service can be done on any ballot question or any community issue.

These positions of LWVMI may have application for local level advocacy:

Children and Youth	Libraries
Education	Prisons
Election Laws	Social Services
Great Lakes Ecosystem	Solid Waste Management
Health Care	

In addition, the Taxation and Budgeting positions might be used, particularly if no local study has been done. In the absence of a local school financing position, local Leagues can neither support or oppose local millage questions.

The state, and LWVUS, Land Use positions can be used to support the concepts that planning should be done and that citizens should participate in the planning process. In order to comment on the details of a local plan, however, a local study must be done first.

Intergovernmental Relations within Michigan does not take the place of a local or area study for advocating at the local level.

3. Advocacy at the local level using a national position.

National positions are listed on LWV's website as well as published in Impact on Issues. Local Leagues can use these positions to lobby at the local level without permission of LWVUS. However, no advocacy can be done at the national level by a local League unless an Action Alert is received from LWVUS.

LWVUS & ACTION

The following must be used if a local League wants to advocate at the national level, i.e., President, members of U.S. House of Representatives, U.S. Senate or members of U.S. departments, i.e. the Department of Treasury.

CRITERIA FOR APPROVING REQUESTS FOR ACTION

The LWVUS board adopts annually a set of legislative priorities to guide its advocacy work in Congress.

The goals are to:

- enhance the League's effectiveness by concentrating resources on priority issues.
- build the League's credibility and visibility by projecting a focused and consistent image.
- ensure that the League has sufficient issue and political expertise to act knowledgeably.
- enable the League to manage resources effectively.

In setting legislative priorities, the LWVUS board considers the following:

- Opportunities for the League to make an impact;
- Program decisions made at convention and/or council;
- Member interest, and
- Resources available to manage effectively.

The board regularly reviews the legislative priorities and is prepared to make adjustments should new opportunities for effective action emerge.

Requests from State/Local Leagues for Permission to Act at the Federal Level

All action at the federal level must be authorized by the LWVUS board. This includes any effort aimed at influencing the decision on a federal issue, such as communicating with an elected or appointed official, joining a coalition, taking part in a press conference or rally, or writing a letter-to-the-editor. A state or local League wishing to work in this way on a federal issue or at the national level must consult with the LWVUS about the intended action.

As part of this consultation process, the state/local League is asked to provide the following information in writing:

- the proposed action and the message to be conveyed;
- the LWVUS position on which the action is based; and
- evidence that the issue is a priority for that state/local League.

Leagues are asked to provide this information on the State and Local League Request Form for Federal Issues which can be found in the Take Action section of www.lwv.org.

If a local League is requesting permission to contact its U.S. Senator(s), on an issue that has not been the subject of an LWVUS Action Alert, it should provide evidence that has not been the subject of an LWVUS Action Alert, it should also provide evidence that the action has been authorized by its state League. Appropriate LWVUS Board and staff will review the action request to determine that it is consistent with League positions and that it will not interfere with LWVUD action on a priority issue. Requests should be sent to lobbying@lwv.org.

ACTION WHEN NO LEAGUE POSITION EXISTS

Remember that an LWV can be effective without taking a position.

Education of the public is an important method of taking action in certain situations, for example, when there is no time to arrive at a position or where taking a position would result in divisiveness in the LWV or the community.

Holding public information meetings which present all pertinent information in an impartial manner can be very useful in bringing public opinion to bear on a problem.

Voter service on issues, as well as candidates, across local LWV lines can also be useful where voting is involved. Both should be coordinated, joint efforts.

The state Board will be glad to help with coordinating joint projects.

CONSIDER THE FOLLOWING

IN DECIDING TO ADVOCATE, ANSWER THE FOLLOWING QUESTIONS:

1. Does the contemplated advocacy fall within the state positions? Is it

consistent with the intent of the position? Is it a means of implementing the position?

2. Are the local members informed and in general agreement? If they are not informed, can the information be presented, and their reaction assessed within the time available?
3. How effective will the League and this advocacy be?
4. Is the advocacy strictly local? If other governmental units beyond your LWVs boundary or other LWVs are affected, see League Basics (www.lwv.org) guidelines on advocacy involving more than one governmental unit and League.
5. Does this local advocacy activity fall within the priorities of this local League?

IN STUDYING

Local Leagues can do studies on local issues only, i.e., a school millage, performance of schools, or use of renewable resources.

For more information: Judy Karandjeff at jkarandjeff@aol.com

VOTER SERVICE

VOTER SERVICE

WHAT TO KNOW

WHERE TO FIND RESOURCES

Be familiar with:

- ✓ All aspects of Michigan Election Law. Information at [Michigan.gov/vote](https://michigan.gov/vote).
- ✓ How elections are conducted in your community.
- ✓ The key players in local elections. (e.g., clerks, city councils, mayors.)
- ✓ How high school voter registration drives are conducted in your area.
- ✓ What steps are needed to hold local candidate forums. Know the role of the organizer, the moderator, and any other leadership positions. *
- ✓ The basics of how Vote411 works, even if your League has a Vote411 Administrator. Information at [Vote411.org](https://www.vote411.org).
- ✓ Vote411 messaging resources on social media.
<https://www.lwv.org/vote411messaging>

Take advantage of the resources:

- ✓ Zoom meetings for Voter Service leaders. Contact the VP for Voter Service to get on the contact list.
- ✓ * A candidate forum handbook is currently being prepared by a LWVMI Voter Services team, with a projected release date of June, 2023. It will be available as a local League resource on the LWVMI website.

For more information contact: Judy Florian at jflo@comcast.net.

MEMBERSHIP

INFORMATION AND RESOURCES FOR MEMBERSHIP LEADERS

BASICS

- Know what information is included in your Leagues database and get access to it. If you are not the database manager, contact the person who is responsible for it.
- Make sure you receive information about new members as quickly as possible, including join date and contact information.
- Have and maintain a list of all your League's members, including contact information.

KNOWLEDGE TO HAVE

- Know how much your League charges for dues and be prepared to explain PMP. Know how much of your League's dues goes to LWVUS and how much goes to LWVMI, and what your League keeps.
- Know that local League membership is counted on January 31 of each year.
- Know what your role is in your League's membership renewal process. This includes knowing when dues must be paid to maintain membership.
- Know your League's DEI policy and make your League's board is familiar with it. Promote using the DEI lens when planning League activities.
- Know the difference between a Geographic Unit, a Member-at-Large State Unit, and an Independent League, and what your League's status is.

NEW MEMBERS BASICS

- Send a welcome letter (or email) to new members as soon as they join.
- Contact new members as soon as possible, preferably by making a phone call. Use email, if necessary.
 - Inquire about their interests and skills.
 - Ask if you can connect them with others who have similar interests.
 - Know what volunteer opportunities there are and who is in charge.

- Welcome new members by name in each newsletter your League sends.

MEMBER *MAINTENANCE*

- Know what activities your League offers and who the contact person for each activity is.
- Get involved in planning your League's programs and activities so you can promote these activities with the membership.
- Check out the League Messaging Calendar on the LWVUS website. It recognizes dates of significant events that have the possibility of becoming League activities. <https://www.lwv.org/league-management/templates-graphics/suggested-messaging-calendar>
- Keep track of which members attend which events. A list might be helpful if you are looking for active members or members with specific interests.
- Periodically check to make sure members are receiving League communications. This may involve making personal calls (OK to recruit help) or sending emails.
- Put something about membership in each newsletter your League sends out.

MEMBERSHIP RESOURCES FROM LWVMI

- Join the *Membership Leaders' Network*. This is a monthly Zoom meeting with information about topics of interest for membership leaders and includes the opportunity for members to share successes and challenges with each other. Contact the LWVMI Membership VP for more information.
- Visit the LWVMI.org website and explore what is available there. Look in the Members section.

For more information contact: Camilla Davis at cdavis.lwvmi@gmail.com.

SUGGESTIONS FOR NEWLY DEVELOPING LEAGUES

Ideas to help your League to grow, thrive, and prosper.

1. Track your progress!

- a. Start a progress report right away (*sample available*)
- b. Note each time your league does a new thing
- c. Include most everything (later you will begin to see the trends and the importance)
- d. Include a monthly tally of your membership numbers
- e. Save samples of things (paper and/or electronic)
- f. Take pictures of your steps and your events
- g. This acknowledges and celebrates each success
- h. It impresses current members (who may not be active yet) and it attracts new members to see all that is being accomplished
- i. You can use for newsletter ideas
- j. You can use it for fundraising and for your applications for MAL and local League status

2. Get noticed

- a. Purchase a nice League sign early on to post outside of all meetings and events
- b. Get some basic League t-shirts to wear when you are at community events
- c. Hold membership meetings in a public place and allow walk ins
- d. Send out media releases about the new League in town and advertise meetings on community calendars
- e. Hold informational sessions on your new League and what you are up to at libraries and/or restaurants
- f. Start an email list of people who express any interest in the League and find reasons to send personalized emails
- g. Establish VOTE411 a.s.a.p., get some bookmarks printed and give them to your members to hand out
- h. Organize a small team of members to educate on voter registration and rights and send them out to events all summer long with League and registration material (with obvious League shirts and signs). This does not lead to lots of registration but creates great community awareness that the League is in town!
- i. Establish social media and website as soon as you can

- j. Find compatible community groups and ask for 5 minutes to talk about the League
- 3. Remember to keep your focus on Voter Services
 - a. It's the League's core work
 - b. It's why most people join
 - c. It is the easiest thing to keep non-partisan
- 4. Start an Observer Corps
 - a. Your government officials will get to know you and will (mostly) appreciate your interest
 - b. Helps connect you to more parts of your service area (helps with recruiting volunteers and finding area venues for League programs)
 - c. Helps members learn about local government
 - d. Helps inform your voter service activities
 - e. Provides a nice entry to the League for new volunteers
 - f. Hold fun gatherings with observer volunteers to talk about observations
 - g. If there is not a "know your community" resource start one (good new member project)
 - h. See LWVMI website for excellent resources
<https://lwvmi.org/miscellaneous-league-resources/>
- 5. Educate yourself and your membership - Focus early meetings on League basics
 - a. Explore and encourage members to explore LWVUS and LWVMI websites. Especially the member sections. (on lwv.org scroll to bottom of home screen and click "League Management")
 - b. Use the League Basics manual for topic ideas
(<https://lwvmi.org/wp-content/uploads/2022/02/League-Basics.pdf>)
 - c. Make non-partisanship a part of your meeting culture and educate regularly about it
 - d. Learn and educate about League positions
(<https://lwvmi.org/lwvmi-positions/>
https://www.lwv.org/sites/default/files/2023-02/LWV_ImpactOnIssues2022-2024.pdf)
 - e. Educate about the League speaking with one voice. This is very important for new Leagues. New members are often very excited and want to speak openly about their participation in the League. Help them understand what is okay and not okay to voice.

- f. Find member(s) comfortable researching League topics and/or positions and then ask them to share what they learned at a membership meeting
 - g. Use current League resources to create simple Voter Registration Voter Education packets and share and educate at membership meetings
6. Include some fun easy bonding activities
- a. Movie and snacks – Iron Jawed Angels, Spotlight, etc.
 - b. Walk in community parades together as League (make sure you are not positioned next to partisan groups)
 - c. Get together to make signs for marches, rallies or parades
 - d. Celebrate your progress together
7. Begin identifying leaders right away
- a. Pay attention to who attends meetings regularly and observe their participation
 - b. Make a personal ask for them to help you lead
 - c. Are there members who geek out on organizational development? Nab them to help
 - d. Are there members who enjoy and are good at engaging other members versus “I” want to do this? Nab them to help.
 - e. Create leadership team/committee as soon as you are able. Even though they are not an official board present the names and ask members to approve of your list.
 - f. Hold both leadership and membership meetings but include plenty of business at early membership meetings so all members have a good idea of what is being decided (that helps engage members in the process and helps you spot new leaders). Later you can add more program topics to membership meetings (that attracts guests – a hopefully new members).
8. Be cautious early on with projects but be open to member interests and strengths
- a. Try and mostly keep projects within your priorities
 - b. Don’t let projects stretch you too thin (make sure you have the volunteers and the resources before agreeing)
 - c. A Project Event Proposal Form (and guidelines) was very helpful in getting members to think through a project idea and gives your leadership/board a tool to review project ideas. ([sample form and guideline sheet available](#))
 - d. Have an enthusiastic “cheerleader” on your team to give you the “we can do this” nudge when you need it.

9. Take advantage of your mentors
 - a. Attend the meetings for your mentor local League when you can to see how they do things
 - b. Call/zoom regularly with local League mentor and your LWVMI coach
 - c. Have lots of questions for your coach – don't just view it as a check in
 - d. Use your "status" to allow you time to make good decisions – "I'll have to check with my mentors on that" "We should check with our mentors first" "LWVMI and our mentors suggest that we start with a voter services focus before branching out"
 - e. Mentors can help a lot if you are struggling with strong willed members
 - f. All of the above lets the mentors get to know you and trust you

10. Participate in activities offered by LWVMI
 - a. Right away find ways to participate. Start slow but try. It is a very good learning experience.
 - b. Let the LWVMI priorities guide you for first project choices
11. Committees/teams that were helpful to establish early on
 - a. Membership committee very helpful step in keeping aware of and welcoming all new members. Very quickly they established a new membership orientation. (*sample packet available*)
 - b. Establishing project specific voter services teams was very helpful (e.g. voter registration, candidate forums, vote411). It helped to spread out the work and responsibilities and got more members involved.
 - c. An "education" committee (not schools) to plan for educating membership was very helpful for planning membership meetings
 - d. Begin creating a list of your committees, networks and groups with descriptions and contact information. This will change and evolve a lot at the beginning but it helps you think through how your structure is developing and provides a tool to keep members informed.

12. Advocacy – take it slow
 - a. Even our 2nd and 3rd full years of action priorities were "to participate when possible in alerts and activities recommended by LWVMI and LWVUS" versus generating our own local advocacy priorities.
 - b. An advocacy request form was very helpful in getting members to think through an advocacy request and gives your

leadership/board a tool to review advocacy ideas. (*sample form available*)

- c. When you do establish special focus groups, they should still always be a “League group first” and secondarily an environmental, gun safety, education group.
 - d. A new committee should start their group by learning about and understanding current League positions on the topic.
 - e. A good idea is to have the group educate themselves and then have them educate membership.
13. Establish a to do calendar for leadership/admin
- a. Calendar planning is central to our on-going board functioning (*sample available*)
 - b. It serves as a useful tool for new leaders during times of transition
 - c. Goal planning sheets for projects help committees, teams and board stay on target
14. Priorities
- a. Get in the practice of setting yearly priorities (*early sample lists available*)
 - b. You can keep it very general and simple at first
 - c. Get input from membership. Share it with membership. Ask them to approve. We continue adopt annual priorities along with our annual meeting election slate and bylaws changes.
15. Transitioning from Geo Unit to M-A-L to Independent League
- a. Get your hands on a copy of the LWVMI Guide to Financial Policies and Procedures. It is excellent!! Use it.
<https://lwvmi.org/wp-content/uploads/2021/09/LLTreasurerinfopkt7.4.2021.pdf>
 - b. Have someone start tracking your income (donations and membership) right away even though it goes through your mentor League (when you are a geo unit) or LWVMI (when you are a M-A-L state unit). This establishes a good practice of staying aware and monitoring income (and expenses).
 - c. Our League practice has always been to retain the entire membership dues for PMPs. Once the PMPs are paid only then is the balance considered to be available for general funds for spending.

This list was created by Darlene T. Allen, League of Women Voters of Marquette County 3/2/2023. This list was not reviewed by LWVMC board and it is not an official LWVMC document.

LWV of Delta County Marquette County Geographic Unit was established 4/2017, transitioned to Marquette County M-A-L State Unit on 2/9/2019 and was recognized as League of Women Voters of Marquette County on 11/8/19.

For more information contact: Darlene Allen at dthomsona@gmail.com.

NEW LEADERS BOOT CAMP

PRESENTER CONTACT INFORMATION

- Darlene Allen, Past President of Marquette Area --
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- Lynne Kochmanski, Washtenaw County Voter Service --
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- Judy Karandjeff, LWVMI Advocacy Committee Chair --
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- Kathy Poore, LWVMI Communications Chair --
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*Lynne substituted for Judy Florian, LWVMI Vice President for Voter Service -- jflo@comcast.net

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