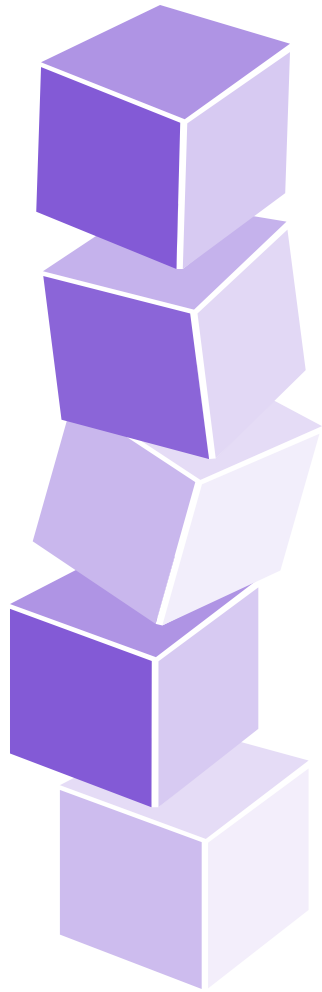
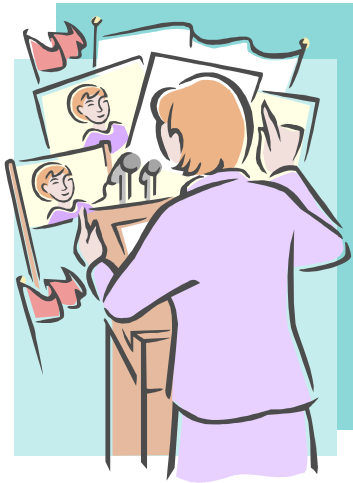


WSDCO TRAINING



April 25, 2009

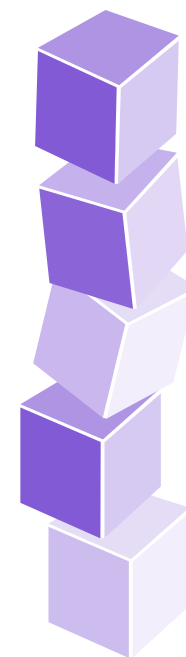
I've Just Been Elected Chair



What Do I Do Now?

Welcome!

- Welcome all Party Leaders—new and returning!
- ◆ This course is intended as a guide to help you run a successful Democratic Legislative District or County organization.
- ◆ Derived from years of experience from current and past Chairs, we offer this package in hopes of answering some of your questions.

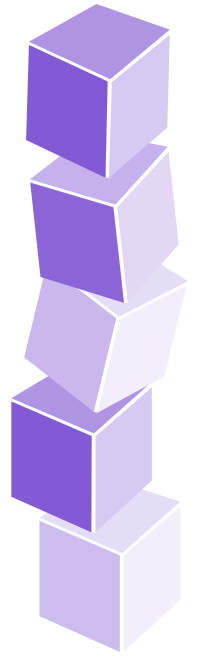


Caveat:

This guide, dedicated to educating party leaders on how to maintain a vital organization that can support the efforts of local Democratic candidates, does not include caucus/convention cycle information. A separate course is conducted in the year preceding the general election for Chairs and other party activists. The updated Chair's Hand guide does, however, have a large section on the subject.

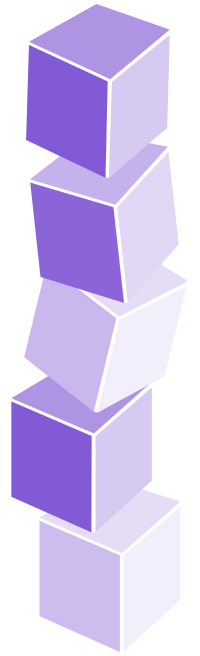
Agenda

- ◆ Mission
- ◆ Bylaws and Standing Rules
- ◆ Robert's Rules of Order
- ◆ Executive Board
- ◆ Standing and ad hoc Committees
- ◆ Strategic Planning
- ◆ Financial / Fundraising
- ◆ Recordkeeping and PDC Reporting
- ◆ Insurance Coverage
- ◆ Technology
 - . Communication and Outreach
 - . Websites and Email



Agenda (continued)

- ◆ Membership
 - . PCOs
 - . Party Building
 - . New Members
 - . Tools for PCOs
 - . Maps and History
 - . Walking/Calling Lists
- ◆ Conducting Effective Meetings
- ◆ Recruiting Candidates
- ◆ Endorsements
- ◆ Summary
- ◆ References

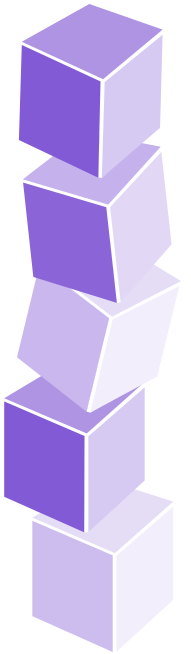


Mission

- ◆ As the Chair, your **primary responsibility** is to build and maintain a strong local Party organization that can carry out this mission:

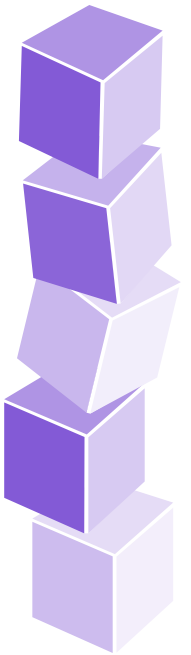
*To build and/or maintain
an effective grassroots Party organization
that can help win local elections and maximize the
Democratic vote in all elections*

*“...the best way to make an organization grow is to give people something to do...it then becomes their organization...”
- Congressman Adam Smith at a Town Hall meeting, 2005*



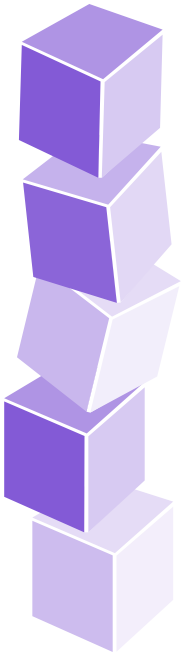
Bylaws and Standing Rules

- ◆ County Central Committees are authorized by Washington State Law and by the State Democratic Party Bylaws.
 - ◆ Legislative District organizations are authorized by the State Democratic Party whose bylaws provide that:
 - . County and District organizations are authorized to operate continuously
 - . Each group is to reorganize every two years, after the election and certification of new PCOs
 - ◆ Each County and Legislative District organization sends two representatives to the State Central Committee. Each District organization has a role in filling legislative vacancies.
- Beyond these basics, **organizations vary a great deal.**



Bylaws and Standing Rules (continued)

- ◆ Rather than a burden, bylaws are the key document in defining your organization's structure and role.
- ◆ Bylaws should be an important aid in running your organization—review them with your Executive Board to ensure viability—you will need to form a committee if significant change is required.
- ◆ Local bylaws must be consistent with Party bylaws and with State and Federal laws.
- ◆ Your membership adopts the bylaws and thereby defines the organization's structure and goals

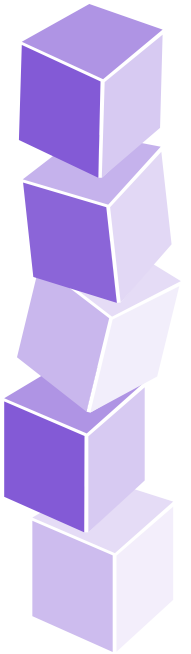


Bylaws and Standing Rules (continued)

- ◆ Standing rules can be established for special needs:
 - Endorsement meeting
 - Filling legislative vacancy
 - Nominating convention
 - Reorganization meeting

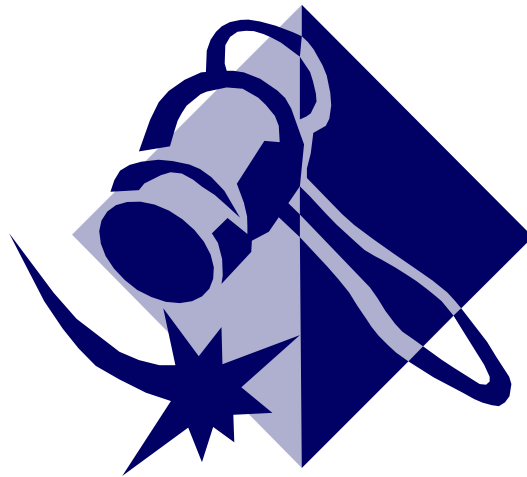
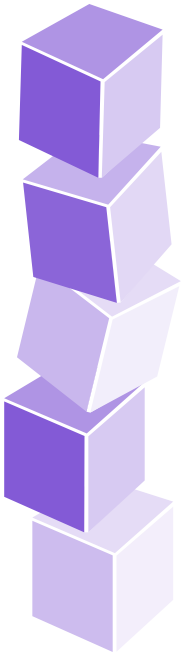
- ◆ Standing rules determine voice and voting rights.

- ◆ Voting members of the organization approve and abide by the rules.



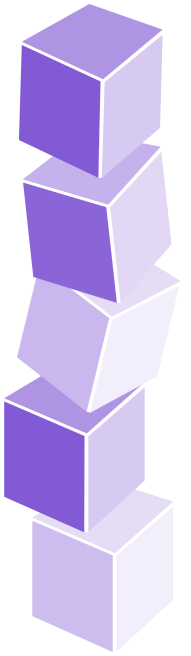
Robert's Rules of Order

- ◆ The Democratic Party uses *Robert's Rules of Order* at all levels to help keep order in our meetings.
- ◆ Most bookstores have copies available, and there are many summaries available on the internet.
- ◆ A summary of the major rules is on the CD made available to you



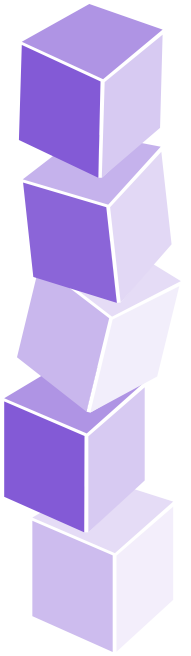
Executive Board

- ◆ Each organization elects a new board of officers at the beginning of odd-numbered years. The local set of by-laws determines how the board is structured and operates.
- ◆ The board should meet on a regular basis and in special session as situations dictate. Ensure that you are using a good location and time for all participants.
- ◆ Use board meetings to plan for general meetings, events, and support to campaigns.
- ◆ Another role a Chair plays is informing his/her Board of the issues at hand and arriving at decisions as a whole—in short, this is where the action is!
- ◆ **Involve your Board members!**



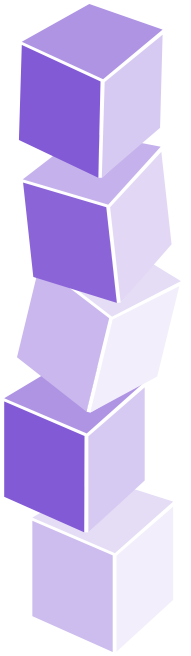
Standing and ad hoc Committees

- ◆ The Chair appoints standing and ad hoc committee chairs and committee members.
- ◆ Most organizations establish two types of committees:
 - 1) Ongoing committees are usually chartered in the bylaws and are known as **Standing Committees**
For example: finance, communications, membership, or platform/resolutions
 - 2) Short-term committees that have a definite time frame and focus on specific issues and are known as **ad hoc** committees
For example: fundraising event, festival, issue campaign



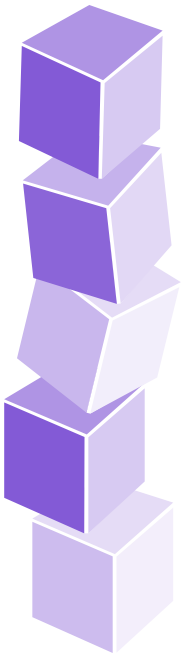
Strategic Planning

- ◆ At the beginning of a new term, the organization has elected a new set of officers and committee leaders, approved bylaws, and has a clear understanding of the group mission...
- ◆ Now, build your strategic plan around those elements for the upcoming two years
- ◆ A strategic plan is a detailed statement of your organizational plan and is often tied to milestones (goals charted by date and percentage complete).
- ◆ Measurements of your strategic plan can be made on a regular basis—monthly, quarterly, semi-annually.



Financial/Fundraising

- ◆ One of the most important volunteers in a local organization is the Treasurer. Your Treasurer will maintain the financial records, keeping a two-year record of month-by-month transactions.
- ◆ As Chair, you will work very closely with the Treasurer.
- ◆ After your election as Chair, you should have received financial records from previous years.
- ◆ Go to the banking institution your organization uses and make sure that signature cards for writing checks are updated with the names of the new officers.
- ◆ File a new C1pc Form with the Washington State Secretary of State and the Public Disclosure Commission (PDC) — this must be done each time a new Treasurer is elected.

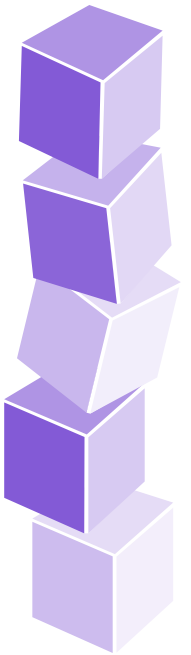


Financial/Fundraising (continued)

- ◆ As a new Chair it will be important for you to understand the basics of PDC reporting. You may want to sign up for online reporting classes with the PDC.
- ◆ Ensure that your Treasurer has an online account and password to file reports with the PDC.
- ◆ You may contact the PDC at:



Public Disclosure Commission
711 Capitol Way, #206
Post Office Box 40908
Olympia, WA 98504-0908
Telephone: 360.753.1111
FAX: 360.753.1112
Toll Free: 877.601.2828
Email: pdc@pdc.wa.gov
Website: <http://www.pdc.wa.gov>

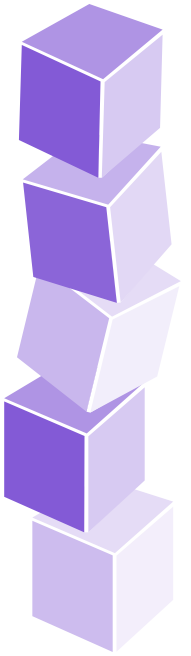


Financial/Fundraising (continued)

It is a good idea to have a Finance Committee which includes the treasurer, and is responsible for:

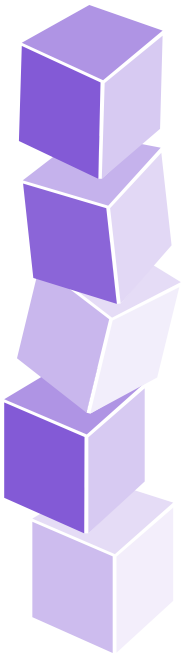
- ◆ Developing a yearly budget
- ◆ Developing a yearly fundraising strategy, including events.
- ◆ Recruiting volunteers to plan and put on fundraising events
- ◆ Insuring that proper PDC reporting is taking place
- ◆ Delivering budget performance reports at executive board and general meetings

The Chair should be an active member of this team.



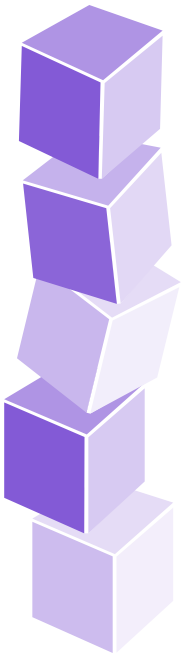
Recordkeeping and PDC Reporting

- ◆ Each organization uses some form of internal bookkeeping—spreadsheet or online package such as MS Money—to record transactions, both income and expense.
- ◆ This complements the online reporting that the Treasurer performs for the PDC.
- ◆ Weekly and/or monthly reporting can be accommodated by the recordkeeping system.
- ◆ Budgets may also be stored in the recordkeeping system for performance reporting: budget versus actual.
- ◆ The PDC publishes a reporting calendar each year; this is very important because immediately following candidate filing week through the general election, weekly reporting of income (C3's) is required.



Insurance Coverage

- ◆ State and County offices should maintain liability insurance policies not only for their offices but to cover events and festivals. The Chair should check to be certain this coverage is in place.
- ◆ If you require insurance coverage for an event, please contact the State and/or County offices to obtain a special policy rider for your event.
- ◆ This is critical during the Presidential Caucus/Convention cycles, as most public school and major event locations require insurance coverage.

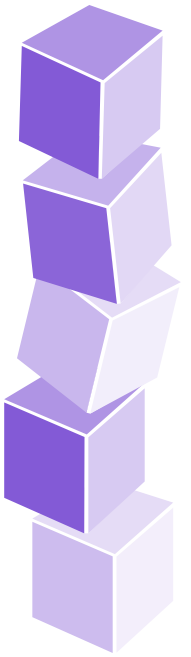


Technology—Communication and Outreach

- ◆ President Obama and former DNC Chair Howard Dean taught us how important the Internet and its many features are for communication and outreach.
- ◆ We have the abilities today to reach thousands of people with one well-placed communication.
- ◆ We can do online fundraising in the same fashion

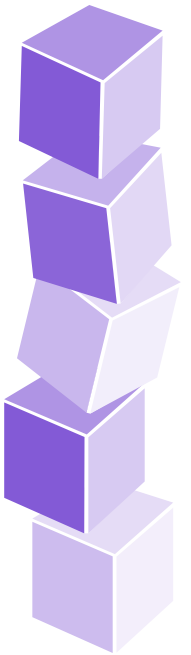


- ◆ We live in a fast moving and changing world of technological opportunities
- ◆ And, we can use “all those marvelous toys” to our advantage



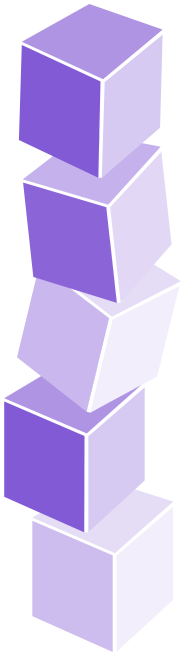
Technology—Websites and Email

- ◆ Most organizations have websites that offer:
 - Documents, such as bylaws, platforms, and resolutions
 - Lists of officers and PCOs
 - Meeting and event notices and calendars
 - Online newsletters
 - Links to other Democratic and blogger sites
- ◆ Some have added precinct maps and election history .
- ◆ The WSDCO has created an excellent website for the Chairs and Vice Chairs of all organizations across the state: **<http://wa-demchairs.org/>**
- ◆ It belongs to you — the content can only be as good as you provide. Ask questions—share processes, procedures, and training materials.



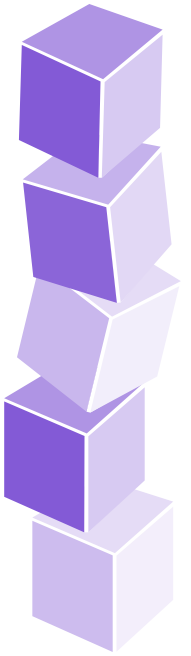
Technology (continued)

- ◆ **It is very helpful to form a technology committee**, which can perform many functions of the party:
 - . Develop and maintain the website
 - . Conduct blast emails. One product used in many groups is “Constant Contact”
 - . Provide high tech features such as online precinct maps and election history
 - . Provide new and innovative techniques to help the organization
 - . Perform basic VoteBuilder tasks for the Party
 - . Train others on how to use VoteBuilder



Membership—PCOs

- ◆ Precinct Committee Officers (PCOs) are the heart and soul of the Party—the grassroots level.
- ◆ They are the neighborhood leaders— and for some voters, the only real presence of the Democratic Party that they see and hear.
- ◆ Recruiting, training and maintaining the PCO force is one of the Chair’s most important responsibilities.
- ◆ The State Party has just updated the *PCO Hand guide* and copies have been made available to you.
- ◆ Various organizations have online and instructor-led PCO training available to you.

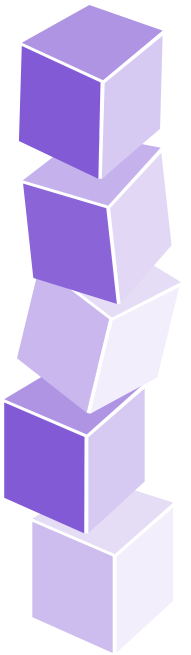


Membership—Party Building

Most organizations have a Vice Chair of Membership who forms a committee to recruit and organize PCOs and new members.

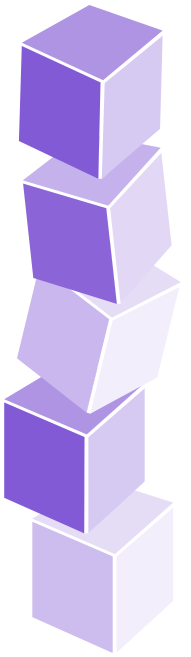
This helps to build a powerful grassroots network:

- ◆ Familiarize all with the District/County Maps
- ◆ Break the map into sections, and assign captains for each section
- ◆ Mark where you have current PCOs and strong members
- ◆ Recruit PCOs for the vacant precincts



Membership—New Members

- ◆ Recruiting new PCOs and new members is crucial to the success of your organization.
- ◆ People who were active in the previous general election campaigns are a very good source for new recruits. Most districts have access to the lists collected at the caucuses (whether in VoteBuilder or a District-level application) and use that information in many ways.
- ◆ You can also recruit new members by attending and joining community clubs, attending fairs and festivals, visiting schools, unions — wherever people are gathering in your respective district.



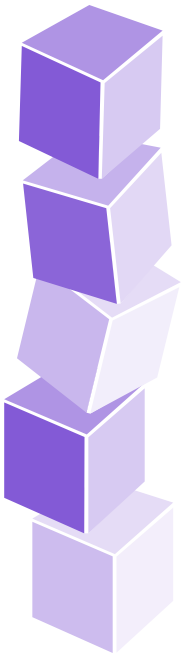
Membership—Tools for PCOs

- ◆ Precinct Maps and Election History are available at the Chairs website — for online viewing and printing.
- ◆ Work is ongoing to include all counties.

(online demonstration of the capabilities)

- ◆ The State Party maintains VoteBuilder, the software that allows you to access the lists of registered voters in your Precinct, Legislative District, or County.
- ◆ By using VoteBuilder, you can create your own calling and walking lists and much more.

(online demonstration of the capabilities)

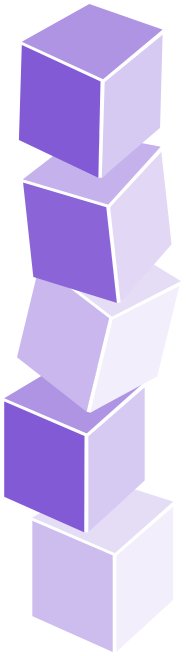


Conducting Effective Meetings

How many times have you sat through a meeting and said, “What was that about?”

You as the Party Leader can do the following:

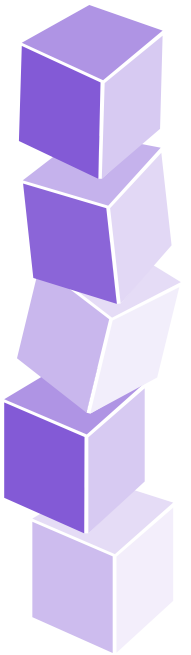
- ◆ Provide programs that are current and of interest to your group and community
- ◆ Involve the attendees—ask questions—ask for input
- ◆ Follow your organization’s traditions
- ◆ Split the meetings into two sections: 1) Start the meeting with special announcements, guests and/or a program; 2) Take a break and then follow with the organizational business.



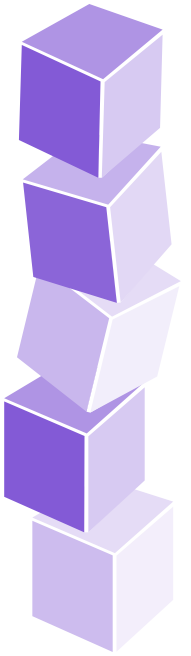
Conducting Effective Meetings (continued)

Resolutions

- ◆ Resolutions can be a blessing or a curse for your local party, depending on how they are handled. Resolutions can be the voice of the local party on matters of policy and principle; but they can also empower members who want to turn your action-oriented party into a second rate debating league.
- ◆ Limit time taken up by resolutions through clear rules, such as requiring that resolutions go first to the executive board or bylaws committee with a copy made available on website, in email, or 50 copies made available at the meeting.



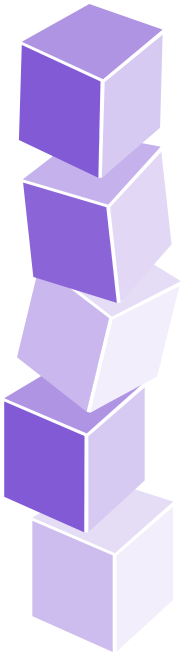
Conducting Effective Meetings (continued)



- ◆ The meetings of legislative district and county organizations are business in nature.
- ◆ ***However, you can have fun, too!!***
- ◆ Providing music, refreshments, contests, door prizes, surveys, political trivia — All make a monthly meeting more interesting for the members.
- ◆ Relax, put your plans in order and go forward to help elect more Democrats!!

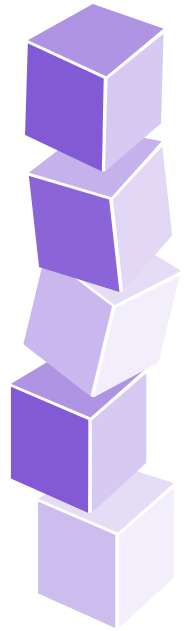
Recruiting Candidates

- ◆ Knowing the list of offices that will be on the ballots in the fall is step one. You can get this from your County Auditor in the early spring of each year. The list also shows incumbents and should be reviewed to make a list of open offices.
- ◆ Establish a Recruiting Chair and Committee.
- ◆ The committee is responsible for making contacts in the community for potential candidates and interviewing them.
- ◆ The handout, Vetting Candidates, will help you in the interviewing process.
- ◆ The Recruiting Committee can then turn over its list of candidates to the Executive Board and/or Endorsement Committee.



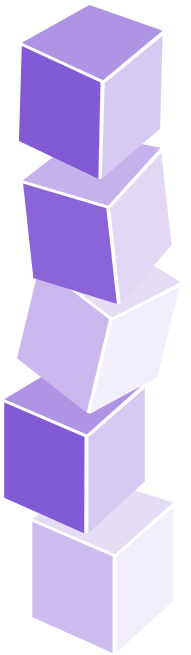
Endorsements

- ◆ Each year your organization will be asked to make candidate and issue campaign endorsements.
- ◆ The endorsement meeting will probably be one of the best attended meetings in any two-year cycle. It provides an opportunity to build the Party, with new members and financial donations.
- ◆ **These meetings will require a clear endorsement meeting procedure.** The local organization bylaws dictate voice/voting rights, ballots, and percent to achieve for endorsement (e.g., 60 percent of those voting and present, 2/3 of those voting and present, etc.).



Endorsements (continued)

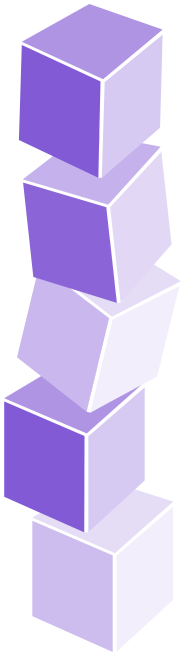
- ◆ You may require candidates to respond to questionnaires. Provide the blank questionnaires on your website for the convenience of the candidates.
- ◆ Follow-up—post results on your website, and notify each endorsed campaign that they have the right to use your organization name and that of the Chair in their advertising.
- ◆ Once your organization has endorsed a candidate, you begin the work with and for their campaign. Their campaign manager will normally contact the Chair and let her/him know their campaign's needs and wants.



Endorsements (continued)

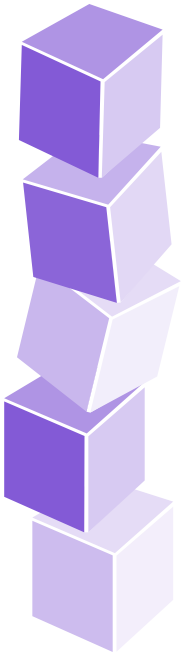
- ◆ Local organizations support many campaign activities:
 - . Doorbelling
 - . Telephoning
 - . Mailing parties
 - . Event planning and preparation
 - . Putting up signs
 - . Representing candidates as a guest speaker at meetings and/or events
 - . Donations

- ◆ It's up to you and your organization how you support campaigns—this is why it is so important to have built a strong and growing political group that will be ready when the candidates call.



Summary

- ◆ We hope the presentation today has answered some of your questions and will serve as a guide for you.
- ◆ The last page is the list of reference materials used during the presentation and made available to you today in CD format.
- ◆ We have come to the end of the prepared materials and welcome additional questions.
- ◆ Thank you for joining in the discussion today.



References

WSDCO Chairs Hand guide

Robert's Rules of Order Summary

Examples of:

Bylaws

IMAP Printing

List of Races for Primary Election
Resolution

Standing Rules

Strategic Plan

Using VoteBuilder to Create
Calling/Walking Lists

Vetting Candidates

