



# MASSACHUSETTS

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## DEMOCRATIC PARTY

## Media



## 2021 Preliminary Call to Convention

*The Massachusetts Democratic Party, in fulfillment of the “Charter of the Democratic Party of the Commonwealth of Massachusetts,” hereby calls a convention for the purpose of adopting a party platform.*

*The convention will occur on September 25, 2021 and the final schedule will be announced in the Final Call to Convention, which will be published in August, 2021.*

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# Welcome Letter from Chair Gus Bickford

Dear Democrats,

First, thank you for attending your local caucus for the 2021 MassDems Convention. By joining us today, you're one of thousands of Democrats coming together to elect the delegates who'll discuss and decide on our Party Platform this fall. Much has changed since our last platform convention in 2017, my first as Chair. In that year's letter to caucus attendees, I emphasized the importance of caring for one another and our country in the years ahead.

Since then, we've faced countless challenges, and COVID-19 has presented us with one of our greatest yet. In the midst of a pandemic, caring for one another has never been more important. Offering Democrats the opportunity to caucus virtually ensures that no person has to choose between their health and having their voice heard. I can't tell you how much I appreciate your dedication and cooperation as we move forward with a caucus season and convention unlike any other.

This year, I'm grateful for the opportunity to revisit our platform. Under the Biden-Harris administration, Massachusetts has the opportunity to emerge as a shining example of what's possible with Democrats in office. That's why taking back the Governor's Office in 2022 must be our top priority. To tackle the crises of our time—a global pandemic, growing economic inequality, a reckoning on racial justice, and an impending climate emergency—we need a leader willing to take bold action. While Governor Baker, Lieutenant Governor Polito, and their Republican colleagues try to hold Massachusetts back, Democrats have marched forward.

The work we do this year—that you do today by being at your caucus—will lay the groundwork for our success in 2022 and beyond. This caucus is just the beginning of many conversations we'll have over the next few months about our own vision for our Commonwealth and country. Our diversity and tenacity are what make our party strong, and I anticipate that you'll bring the same passion and consideration to our platform hearings between August 2nd and 14th.

Lastly, we are committed to ensuring that all delegates are able to attend our convention, regardless of financial standing. I commend the local committees and elected officials who subsidize the fee for their delegates and alternates. Students, seniors, and persons with disabilities are eligible for a reduced rate of \$50, and any delegate in need is encouraged to apply for a fee waiver.

Whether you're a first-time attendee or a veteran caucus-goer, thank you again for your participation and I look forward to seeing you at the 2021 MassDems Convention this fall!

Sincerely,



Gus Bickford

Chair, Massachusetts Democratic Party

# 2021 Method of Selecting Delegates

1. The Massachusetts Democratic State Committee shall convene in-person or virtual caucuses in each ward and town for the purpose of electing the apportioned number of Delegates and Alternates to the Convention, except that, in the case of cities, a waiver may be granted by the Democratic State Committee Chair or designee for a ward or several wards to hold the caucus outside the ward but within the city and provided that the chairs of all wards seeking to caucus at the same site must sign a waiver request at least 9 days prior to the requested date. Said waivers shall be granted except in unusual circumstances where failure to grant such a waiver will increase the opportunity for participation by registered Democrats. Should several wards in a city meet together, they must caucus separately by ward for the election of Delegates and Alternates.
2. One Delegate shall be allocated to each ward or town and the remainder on the basis of a formula giving equal weight to Democratic Party registration in accordance with the Charter and to the average vote for Democratic candidates in the last general elections for the offices of Governor and President; provided that the total number of Delegates elected shall be no more than those elected in 2006. Provided however that town and ward committee Chairs shall be ex-officio Delegates who shall not be included in the total number of Delegates allocated for the caucus. The percentage of persons chosen as Affirmative Action/Minority Add-Ons shall be no less than the percentage so chosen in 2006.
3. The number of Alternates for wards and towns: 2 or fewer Delegates shall have 1 Alternate, except that the number of Alternates shall not exceed the number of Delegates; 3 Delegates shall have 3 Alternates; 4 - 20 Delegates shall have 4 Alternates. For every 10 Delegates or fraction thereof above 20 Delegates there shall be 1 additional Alternate: 21 – 30 shall have 5 Alternates, 31 – 40 shall have 6 Alternates and 41 – 50 shall have 7 Alternates. Said Alternates shall be ranked according to the number of votes each receives. Tie votes shall be decided by lot; if no such election has occurred because the Alternate Candidates are uncontested, then such rank shall be determined by lot. Should the results remitted to the State Party not include a ranking of alternates, party staff will determine alternate ranking by lot immediately upon receipt of the results.
4. It shall be the responsibility of the chairs of the Democratic ward and town committees to call and chair a local caucus to be held no earlier than **June 15, 2021 and no later than July 31, 2021**. Caucus start times shall be no earlier than 9 AM on Saturday or Sunday and no earlier than 5 PM on a weekday, and to promptly notify the Democratic State Committee of that time and virtual meeting link by **June 8, 2021**. If the chair of a ward or town committee is unable to serve as described above, the next highest-ranking officer of the committee shall be responsible for serving in that capacity.
5. On the day of the scheduled caucus, the Chair of the Democratic State Committee or his/her designee may, with the advice and consent of the General Counsel or his/her designee and the Chair of the Rules Committee if possible, declare or grant a postponement and rescheduling of a ward or town caucus due to an emergency on the day of the scheduled caucus that substantially impairs the ability of registered Democrats to participate in the caucus on that day. Any such postponement shall require full and proper public notice for the rescheduled date satisfactory to the Democratic State Committee Chair or his or her designee.
6. It shall be the responsibility of the chair of the local committee to make every reasonable effort to notify all registered Democrats no sooner than thirty and at least seven days before the local caucus. For example, if the caucus is on June 15, 2021 then publication must occur between May 16 and June 8, 2021. The minimum notice to the local Democrats shall consist of an announcement indicating date, time, virtual registration link and purpose of the meeting appearing in [www.massdems.org](http://www.massdems.org) and submitted to local newspapers or other

online local media with at least one documented communication with the local paper and one newspaper or online newspaper of Affirmative Action and Outreach if available. Each ward and town committee shall inform the Chair of Democratic State Committee, in writing, no later than June 8, 2021, of the date, time and location of the ward or town's caucus.

- a) If a meeting has not been scheduled and announced on [www.massdems.org](http://www.massdems.org) by June 8, 2021, any ten registered Democrats, residing within the affected ward or town, may be authorized to call such a meeting, provided that each sign a request for such authority from the Chair of the State Committee to be submitted by June 15, 2021.
- b) If a ward or town committee fails to schedule such a caucus and a caucus is not called as outlined above, the State Committee Chair, or his or her designee, in consultation with the district State Committee members, may do so. A caucus called by either of the above methods must be scheduled and held prior to July 31, 2021. A caucus called by either of the above methods must be duly noticed, in the manner prescribed above. If a caucus is called by petition, it shall be the responsibility of the petitioners to publicize the caucus. If a caucus is called by the Chair of the Democratic State Committee, it shall be the responsibility of the Chair, or his or her designee, to publicize the caucus. The Chair of the Democratic State Committee shall appoint a temporary caucus chair, when a caucus is called by one of the above methods. The temporary caucus chair shall bring to the caucus a copy of the official registration of the Democrats in the locale. The first order of business at the caucus will be the election of a caucus chair. The caucus chair is not an Ex-Officio Delegate by virtue of chairing the caucus.
- c) For the 2021 caucuses, the Party is strongly encouraging Wards and Towns to hold their caucuses virtually and using the Zoom application (or other online meeting application regularly used by the committee). The Party will be sharing limited Zoom licenses with trained caucus meeting attendants to help Chairs run their caucuses and voting. These licenses will be distributed on a first come first served basis. Wards or Towns that choose to hold in-person caucuses must do so following all current COVID safety requirements and provide a virtual option for those that are not comfortable attending an in-person caucus.

7. The local chair shall bring to the caucus a copy of the most recent official registration of Democrats in the locale. Only registered and pre-registered Democrats from that ward or town shall be allowed to vote on any matter at the local caucus. Pre-registered Democrats must be 16 years old by June 15, 2021 and must be pre-registered by the time of the caucus. Any person not shown on said party registration list must either provide proof of Democratic Party registration (or pre-registration) or register (or pre-register) prior to the close of the caucus registration period. Registration shall open at least 30 minutes prior to the stated time of the Caucus and remain open until all persons presenting themselves by 15 minutes after the stated time of the Caucus have registered (including any in the virtual waiting room). For example, if a chair publicized the time of their town's caucus as 5:00 pm, registration must open by 4:30 pm and must accept all registrants who are in the waiting room by 5:15 pm. Ballots shall not be distributed until all such persons are registered and registration has been closed. Those voting must be present at the caucus. There will be no absentee or proxy voting at any local caucus for any reason.

The chair will call the caucus to order at the time determined for the commencement of the caucus in accordance with Section 4. There shall be only seven items on the agenda. The chair shall recognize questions pertaining to agenda items. (Agenda item (g) must begin within one hour after caucus is called to order.) No caucus shall have the right to waive the reading of any document or communication included in this agenda.

- (a) Information concerning the **2021 Massachusetts Democratic State Convention** with special emphasis upon the responsibilities of Delegates who will attend.
- (b) Discussion of “Affirmative Action and Outreach” as outlined in the Party Charter and Statewide Affirmative Action and Outreach Plan. The Chair shall also inform the participants that any candidate who is not elected as a Delegate by the caucus and is a person with disabilities, LGBTQ+, minority or youth, is eligible to apply to the Democratic State Committee for selection as an add-on Delegate as outlined in Section 31b.
- (c) Review of the **“Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention”** with an emphasis on the one ballot election procedure.
- (d) Explaining that certain Democratic Party officials are ex-officio Delegates to the convention and that they each automatically attend the convention as full voting Delegates. The Chairs of ward and town committees at the time of the convention are **not** included in the total allocation for their delegation and need not seek election as elected Delegate and are equal to all other Delegates.
- (e) Reading of the letter from Chair.
- (f) Highlight the Delegate Fee Waiver process.
- (g) The nomination and election of Delegates and Alternates.

A link to the “Preliminary Call to Convention for the Massachusetts Democratic Party” must be announced at each local caucus.

- 8. The caucus is an open Democratic Party meeting; no person shall be denied admittance. Participants who are not registered Democrats from the locale hosting the caucus may be directed to a viewing link or may be removed from the meeting if they are disruptive as determined by the chair.
- 9. No persons shall be excluded from any stage of the Delegate selection process for failure to pay a cost or fee. There shall be no admission or expense charged at the local caucus. Donations may be solicited as long as the caucus location is not in a public building.
- 10. There shall be no quorum requirement for the local caucus.
- 11. No person may vote in more than one Delegate selection caucus.
- 12. Discrimination on the basis of race, sex, age, color, creed, national origin, religion, sexual orientation, gender identity, ethnic identity, economic status or disability in the conduct of Democratic Party affairs is strictly prohibited.
- 13. Affirmative Action and Outreach, as outlined in the Party Charter and Statewide Affirmative Action plan, shall be a priority concern of the organizers of each local caucus. The caucus location must be fully accessible to persons with disabilities and publicized as being so. A waiver may be granted by the Executive Director of the Party if no accessible facility exists within the ward or town. Ward and town committees shall make every effort to encourage full participation by all Democrats with particular concern for each of the designated target groups: Blacks, Hispanics, Asian-Pacific Americans, Native Americans and Cape Verdeans; and outreach programs to persons with disabilities, lesbians, gay men, bisexuals, transgender people, workers, youth, low and moderate-income people, and senior citizens in the Delegate selection process. The chairs of each caucus



shall announce to the participants the Affirmative Action and Outreach goals during the caucus before any vote is taken.

14. Delegates and alternates apportioned to each ward and town must be gender balanced (within one, in the case of odd numbers) with non-binary gender Delegates and alternates not being counted in either the male or female category.

One open ballot will be used for the initial election of self-identified male, female and non-binary candidates. Should only self-identified male and female candidates be nominated, the committee may use separate male and female ballots.

For elections on one ballot, the distribution of seats will be determined by the election results with the candidate receiving the highest vote, determining which gender gets the first Delegate allocated. If there is a tie for highest votes between two or three candidates (ie: male / female or male / female / non-binary), determination of the first Delegate allocated will be determined by lot (e.g. putting numbers in a hat or flipping a coin).

The Delegate or alternate positions will then be distributed by alternating genders with non-binary candidates not counting towards a gender. If there is a tie for last Delegate, an additional ballot will be used to determine the outcome of the tie.

**Towns with 1 elected delegate allocated may elect:**

Either 1 female, 1 male or 1 non-binary delegate

**Towns with 2 elected delegates allocated may elect:**

- a) 1 female delegate and 1 male delegate OR
- b) 1 female delegate and 1 non-binary Delegate OR
- c) 1 male delegate and 1 non-binary delegate OR
- d) 2 non-binary delegates

**Towns with 3 elected delegates allocated may elect:**

- e) 2 female delegates and 1 male delegate OR
- f) 2 male delegates and 1 female delegate OR
- g) 1 female delegate, 1 male delegate and 1 non-binary delegate OR
- h) 2 non-binary delegates and 1 female delegate OR
- i) 2 non-binary delegates and 1 male delegate OR
- j) 3 non-binary delegates

**Towns with 4 elected delegates allocated may elect:**

- a) 2 female delegates and 2 male delegate OR
- b) 2 female delegates, 1 male and 1 non-binary delegate OR
- c) 2 male delegates, 1 female delegate and 1 non-binary delegate OR
- d) 2 non-binary delegates, 1 female delegate and 1 male delegate OR
- e) 3 non-binary delegates and 1 female delegate OR
- f) 3 non-binary delegates and 1 male delegate OR
- g) 4 non-binary delegates

And following the above examples, if there are enough opposite gender candidates for the slots allocated, the delegates are distributed equally by gender (within one), with non-binary individuals not counting towards the gender totals. If a caucus does not have enough candidates of one gender, then the delegate slots filled can be uneven by more than one, as long as they follow the distribution examples above.

15. Other than those Party and elected officials specified in Sections 31 and 32, no person shall serve as an automatic or ex-officio voting Delegate.

16. Voters must be informed by the chair of the caucus of the number of Delegates to be elected.

17. Alternates shall be elected after Delegates by the same method. If an elected Delegate certifies prior to the convention that he or she is unable to serve, or the Ward or Town Chair or State Committee Member so certifies, the Chair of the Democratic State Committee upon verification shall issue credentials to the ranking Alternate of the same sex from that same ward or town (to the extent that there is no Alternate that fits the qualifications for said Delegate position, then there will be no substitution); and if the Ward or Town Chair or that Alternate certifies that he or she is unable to serve, then the Chair of the Democratic State Committee, upon verification, shall issue credentials to the second ranking Alternate of the same sex from the town or ward in which the Delegate resides. Delegates and Alternates will receive convention sign in credentials in the mail prior to the convention if their payment is received or fee waiver is accepted by August 13, 2021. Those who pay or submit a fee waiver after this date may expect to receive their convention sign in credentials in later mailings prior to the convention or at the convention itself. Alternates with credentials will be permitted to replace certified elected Delegates of the same sex when possible, from their own town or ward, in accordance with the process, procedure and timelines determined in the Rules of the 2021 Convention.

(a) The Committee shall not elect alternates for Ex-officio Delegates, minority, disabled, Youth and LGBTQ+ Add-on Delegates. Ex-officio and add-on Delegates will not be replaced by Alternates.

18. Candidates must be registered Democrats at the time of the caucus within the ward or town from which they are running as Delegates. Only registered Democrats from that ward or town at the time of the caucus shall be allowed to vote on any matter at the local caucus. For these purposes, a registered Democrat is a duly registered voter who has enrolled in the Democratic Party or a pre-registered Democrat who must be 16 years old by June 15, 2021 as specified in section 7 of this document.

19. A candidate for Delegate or Alternate at the local caucus must be present and give his or her written consent to nomination. An exception may be made for a person serving in the Armed Forces of the United States who advises his ward or town chair of his/her desire to be considered for election prior to the caucus. If there are not enough candidates present to fill all delegate and alternate positions, two-thirds of those present and voting at the local caucus may move to have a candidate's name placed in nomination despite the candidate's absence, provided that the candidate has notified the chair of his or her interest in running. If there are fewer present candidates than delegate or alternate positions then present candidates are deemed elected. For example, if there are four male delegates to be elected and three male candidates for delegate are present, and two absent candidates' names are placed in nomination, then the three present candidates are deemed elected and the caucus votes on the two candidates who are absent.

20. No person, when registered as a Democrat, who publicly supported and/or endorsed any candidate whose announced intention was/is to oppose a nominee of the Democratic Party, in the current or a previous partisan election may be nominated, elected or seated as a Delegate or Alternate. For previous support the period of time during which such person will be prohibited from participating as Delegate or Alternate is:

- For U. S. President and statewide offices: four years from the date of the election in question.
- For all other offices: two years from the date of the election in question.



21. Nominations shall be made from the floor and will include the candidate's name and self-identified gender. Nominations must be made and votes cast separately for each candidate for Delegate or Alternate and not for the slate as a whole, although slate making shall not be prohibited.
22. Use of the Unit Rule is prohibited as required by the State and National Charter, i.e. every vote shall be cast individually and no delegation may bind its members to vote with the majority.
23. Nominations are closed by two-thirds (2/3) of those present and voting or by general consent. The names of all candidates for Delegate and Alternate must be posted before balloting begins; however, names of candidates who are unopposed for a position need not be posted.
24. Nominations can be reopened by a majority of those present and eligible to vote.
25. Each candidate will be allowed to make a two-minute speech. The provision allowing each candidate to make a two-minute speech may be waived or amended by a vote of two-thirds (2/3) of those present and eligible to vote.
26. Persons eligible to vote may vote for as many person(s) as they wish, up to the maximum number of persons to be elected.
27. Voting shall be by written or electronic ballot and the use of tellers to be appointed by the chair of the caucus; except that candidates who are unopposed for a position may be deemed elected and no ballot is required.
28. Election at local caucuses shall be by a plurality of those present and voting; that is, those candidates receiving the greatest number of votes on the first ballot will be elected. A runoff will be conducted in the event of a tie vote. The tally shall be announced.
29. The chair of the caucus shall fill out the form certifying the election of local Delegates and Alternates to which must be appended a listing of the voting on each ballot.
- a) The chair of the local caucus must mail their complete caucus results to the Massachusetts Democratic Party seven days after the caucus or no later than August 6, 2021. The results include: delegate and alternate certification forms, consent to nominate forms (with vote tabulation form appended), chair certification forms, and caucus attendee sheets. The registration fee of **\$75.00** per delegate must be mailed or completed by the Delegate/Alternate and received by the Party by **August 13, 2021**. A late fee of **\$15.00** will be due with each Delegate/Alternate registration postmarked after **August 13, 2021**. This fee may be reduced if the convention is not held in person.
- b) Ward and town committees are strongly urged to pay the registration fees for delegates. Delegates seeking a low-income waiver of the registration fee must complete and file a letter of application, using the enclosed form to submit by mail or may submit an online form available at [massdems.com/convention](https://massdems.com/convention). Only completed forms will be considered. They may require additional written documentation relating to the delegate's financial circumstances.
- c) If the caucus book has not been received by September 1, 2021, no one shall be seated in the Ward or Town Chair's ex-officio delegate position.
30. The State Committee Chair shall appoint a Credentials Committee that will meet prior to and during the Convention to determine any disputes regarding the issuance or validity of credentials. Challenges to the credentials of any Delegate or Alternate shall have been submitted to the Credentials Committee no later than

one week prior to the start of the Convention by written challenge submitted to the headquarters of the Democratic State Committee. All those whose credentials are challenged shall be notified and afforded due process. The decision of the Credentials Committee shall be final and not subject to appeal or further challenge. The Credentials Committee shall devise a plan for the distribution of delegate and alternate credentials; the Chair of the Credentials Committee shall be charged with the implementation of such plan.

**31. (a.) The following Massachusetts Democrats shall serve as ex-officio Delegates to the Convention with full voting privileges:** Democratic Members of Congress, Democratic Constitutional Officers, Democratic Members of the State Legislature, Democratic Mayors, Democratic County Elected Officials (from the following list: Clerk of Courts, County Commissioner, County Treasurer, District Attorney, Register of Deeds, Register of Probate, Sheriff), Members of the Democratic State Committee, former Chairs of the Democratic National Committee, former Democratic Constitutional Officers, former Democratic members of Congress, Members of the Judicial Council, and City, Ward and Town Committee Chairs except such office holders or party officials who are not qualified to serve as outlined in Section 20. Ward and Town Committee Chairs shall retain their ex-officio status only if they have called a Caucus, in accordance with the procedures outlined in Section 4 and complied with the filing requirements outlined in Section 29.

**The above-named ex-officio Delegates may not run for election as a Delegate at a Caucus, with certain exceptions for City/Ward/Town Chairs.**

- (b.) The Democratic State Committee shall select a number of additional delegates, who are not disqualified from serving as outlined in Section 20:
- i. To ensure adequate representation at the Democratic State Convention, the Chair of the Democratic State Committee shall survey the Delegates elected at the caucuses to determine whether minority, disabled and LGBTQ+ representation reflect the participation of minorities, disabled and LGBTQ+ in the Party as defined in Article I of the Charter of the Democratic Party of the Commonwealth of Massachusetts. If it does not so reflect the minority population of the Commonwealth, the Democratic State Committee shall establish a target number reflecting the percentage in the most recent Party affirmative plan and elect, based upon the recommendation of the Caucus of Minority Democrats, which shall utilize a process based upon a lottery and geography and giving first preference to unsuccessful Caucus candidates and approved by the Democratic State Committee and which shall consist of the minority members of the Democratic State Committee, at least forty-five days prior to said Convention, a number of at-large Delegates. The chair of each local caucus must indicate, when submitting the caucus results, the representation of minority, youth, disabled, affirmative action and LGBTQ+ groups within his or her ward or town's delegation.
  - ii. Further, the State Committee shall select, upon the recommendations of the Disabilities Outreach Sub-Committee, at least forty-five days prior to said convention a number of at-large delegates with disabilities to provide such representation.
  - iii. Further, the Democratic State Committee shall elect, based upon the recommendation of the LGBTQ Outreach Subcommittee at least forty-five days prior to said convention, a number of at-large LGBTQ+ delegates.
  - iv. And, the Democratic State Committee shall appoint, based upon the recommendation of the Youth Services Subcommittee, following the procedure previously adopted and in effect, by the Youth Services Subcommittee at least forty-five days prior to the convention, a number of "young" Delegates on an at-large basis equal to the number of Delegates seats left vacant due to the failure of such towns or wards to hold a caucus or fill their delegate allotment, but in no event, fewer than one hundred (100) Delegate seats. These seats shall be equally divided between men and women, and preference shall be given to "young" Democrats residing in towns or wards that failed to hold a caucus.

The Executive Director of the Massachusetts Democratic Party shall institute an application procedure to implement these add-on procedures described above.

**No person eligible to be an ex-officio delegate may run in a local caucus, except for City, Ward or Town Committee Chairs or State Committee members whose term may expire before the Convention.**

All such aforementioned delegates shall pay a delegate fee and if applicable a late fee after notice of their selection by the State Committee.

32. The Chair of each City, Ward and Town Committee at the time of the Convention (as duly recorded with the offices of the Secretary of the Commonwealth and the Democratic State Committee) shall serve as an ex-officio Delegate to the Convention with full voting privileges. If he/she cannot serve or is a delegate in another capacity, the next highest-ranking officer (vice chair, secretary, treasurer and then affirmative action and outreach officer) shall. **If the next highest-ranking officer cannot, a meeting of the full committee shall be called to elect one (1) to serve in this capacity, provided the Chair held a caucus for the most recent convention.** If there are Co-Chairs of the Committee, a meeting of the full committee shall be called to elect one (1) to serve in this capacity. The Ward/Town Chair's ex-officio Delegate status will not be counted in the number of Delegates allotted to his/her delegation.

33. The Chair of the Democratic State Committee shall appoint a Compliance Review Committee, which shall hear and decide all challenges to the results of a caucus.

34. Challenges to the conduct of caucus and or the election of Delegates and Alternates shall be filed separately for each Ward and Town with the Compliance Review Committee by a registered Democrat, residing within the ward or town, and having direct knowledge of the grounds for the challenge. Said challenge shall be postmarked no later than ten days after the caucus. Specific grounds must be addressed in an initial challenge. The Chair of the Compliance Review Committee will review the challenges, and shall determine if a hearing is necessary, and shall present all information pertinent to his decision to the full committee, all subject to further review by the full committee if requested by the challenger or otherwise. Information concerning challenges will be available from the Democratic State Committee, 11 Beacon St, Suite 410 Boston, MA 02108; 617-939-0800.

**35. These rules may not be suspended, amended or overruled by any local committee or caucus.**

36. Caucus Chairs shall retain all individual voting ballots for at least 30 days, and shall after challenge forward same to the State Committee. Caucus Chairs shall furnish the names and addresses of each caucus participant to the Democratic State Committee together with the ballot results no later than Seven (7) days after the caucus or no later than August 6, 2021.

# Facilitated Caucuses

Caucusing will look different in many communities--whether those caucuses are completely virtual or hybrid. Because of these changes and an increased reliance on technology, MassDems is offering town and ward committees a **trained facilitator** to help chairs and ensure a smooth and productive caucus.

Caucus facilitators will act as tech-savvy secretaries for the virtual component of caucuses. They will remain at home, on their computers, logged into the caucus Zoom meeting, operating as a Zoom host. Caucus facilitators will help with getting participants listed on the sign-in sheet, looking up and confirming participants' voter registration statuses, monitoring the Zoom chat, sending out electronic forms, and tallying votes.

Committees are **not** required to have facilitators at their caucuses. Committees that have volunteer members who are comfortable with technology such as Zoom features and Google Sheets may want to simply run their caucus on their own, or after attending one of our Caucus Facilitator Trainings or Chairs Training.

Caucus facilitators can **not** run a caucus for a committee; the Chair of committee runs the caucus, while the facilitator helps with the tech logistics. All primary features of a caucus such as introductory remarks, explaining directions, running the nomination process and voting process are the responsibilities of a Chair. Caucus facilitators will be MassDems staff as well as interns and trained volunteers.

## How to Schedule a Facilitated Caucus

Chairs can schedule a facilitated caucus by going to <http://bit.ly/FacilitatedCaucusSignUp>. Chairs will see a list of time slots, based on the availability of our facilitators. **After** the chair selects an available time, they can submit the date of their caucus through our Caucus Date Submission Form (<https://bit.ly/caucusdate>). Committees that wish to have a caucus facilitator should find a time on our Google Calendar **BEFORE** they submit their Caucus Date Submission Form to confirm that the date they have chosen will have caucus facilitators available.

## Does My Committee Need a Caucus Facilitator?

No, caucus facilitators will be MassDems staff and volunteers who are comfortable with technology and have attended caucus facilitator training. Committee members who are comfortable with technology such as Zoom and Google Sheets will be able to serve as effective Zoom Managers and volunteers, and we encourage them to attend a caucus facilitator training beforehand as well as read through the relevant sections of the 2021 Preliminary Call to Convention.

### How can I sign up for a Caucus Training for Chairs?

June 7th Chairs Training @ 6:30pm: [Sign Up Link](#)  
June 10th Chairs Training @ 6:30pm: [Sign Up Link](#)  
July 8th Chairs Training @ 6:30pm: [Sign Up Link](#)  
July 12th Chairs Training @ 6:30pm: [Sign Up Link](#)  
July 15th Chairs Training @ 6:30pm: [Sign Up Link](#)

### How can I sign up for a Caucus Facilitators Training?

May 24th Facilitated Caucus Training @ 6:30pm: [Sign Up Link](#)  
May 27th Facilitated Caucus Training @ 6:30pm: [Sign Up Link](#)  
June 3rd Facilitated Caucus Training @ 6:30pm: [Sign Up Link](#)  
June 5th Facilitated Caucus Training @ 10am: [Sign Up Link](#)

# How to Run a Successful Hybrid Caucus

## Overview

If you are conducting a hybrid caucus, you will be running a caucus in line with public health guidelines **that will also be available on Zoom**. Attendees may come in person or join on Zoom and both types of participants should be treated equally.

Your caucus should be in line with local and [Massachusetts public health guidelines](#), in a location that is ADA accessible. Simultaneously, caucuses **must** offer a virtual component to accommodate people who wish to attend the caucus but do not feel comfortable engaging in in-person events due to COVID-19.

To minimize technical difficulties, you will need volunteers to manage the Zoom, as well as volunteers to ensure a safe and smooth experience for those attending in person. Your Zoom manager will ensure that virtual participants are registered Democrats from your town or ward (or guests) and that they can hear, vote, and speak.

While caucuses are permitted to have secret ballots, they are not required. MassDems recommends **against** having secret ballots this year, given the nature of hybrid events. At the physical caucus, the Zoom manager will relay to virtual participants what is happening at the caucus in real time as they listen along. Virtual participants will cast their votes through the Zoom manager, who will ensure that their votes are counted. The chair should work closely with the Zoom manager to ensure the equal participation of virtual participants.

## Pre-Caucus

Please complete these steps before your caucus:

### 1. **Secure a Zoom Pro account**

- Committees should use Zoom Pro accounts, as meetings will likely go over 40 minutes. If you expected over 100 attendees, please contact MassDems for support. You will need to provide a Zoom link when you announce your caucus, so please do this as a first step.
  - i. To access Zoom Pro:
    - Check if members of your Town/City Committee or [local state committee members](#) have access to a Zoom Pro account and ask them to set up the meeting registration.
    - Purchase a [Zoom Pro account](#) for \$14.
    - Check with MassDems at [convention@massdems.org](mailto:convention@massdems.org) to ask if there are available Zoom licenses.

### 2. **Schedule your caucus and set up your Zoom link**

- In your Zoom account, navigate to “meeting” and select “schedule a meeting.” Complete the requisite details. When creating the Zoom link, be sure to do so through a Zoom Pro account and confirm the date, time and title with the individual creating the link.
- Set the link to allow for [registration and a waiting room](#), rather than a passcode.

The screenshot shows the Zoom 'Recurring meeting' settings interface. At the top, there are navigation links: 'zoom', 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', and a link to 'Recurring meeting'. The main content area is divided into sections: 'Registration' with a checked 'Required' checkbox; 'Meeting ID' with 'Generate Automatically' selected (radio button) and 'Personal Meeting ID 468 499 3144' as an option; 'Security' with an unchecked 'Passcode' checkbox and a note 'Only users who have the invite link or passcode can join the meeting'; and 'Waiting Room' with a checked checkbox and a note 'Only users admitted by the host can join the meeting'.

- You must submit your caucus date, time, location and Zoom registration link at <https://bit.ly/caucusdate> by June 8th. Select a date between June 15th and July 31st. Caucuses must occur after 9 am on weekends and after 5 pm on weeknights. Zoom invitations must include the Zoom link **AND** the phone number that participants can use to dial in.

### 3. Notify registered Democrats in your town or ward of the caucus

Be sure to notify your committee of the caucus as soon as possible. Notify Democrats through local media no sooner than thirty and at least nine days before caucus. See Addendum C for a list of minority media outlets. **Be sure to note the physical location of your caucus, as well as reminders to wear masks and maintain social distancing and also include a link to register for the Zoom.**

### 4. Recruit Volunteers

You will need several volunteers to run your hybrid caucus successfully. All volunteers should commit to being in-person. Secure at least the following individuals, plus any others you may need:

1. **Chair of the caucus:** this will most likely be you. This person will run the caucus process.
2. **Sign-In Volunteer(s):** This person will check in all participants and confirm their registration status, or help them register as a Democrat. Only registered/pre-registered Democrats from your ward or town shall be allowed to vote on any matter. Pre-registered Democrats must be 16 years old by June 15, 2021. Any person not shown on said party registration list must either provide proof of Democratic Party registration (or pre-registration) or register (or pre-register) prior to the close of the caucus registration period. Registration shall open at least 30 minutes prior to the stated time of the caucus and remain open until all persons presenting themselves by 15 minutes after the stated time of the caucus have registered.
3. **Zoom manager:** This person will check in people to the Zoom, confirm their status as a guest or a registered Democrat, flag virtual speakers for the chair, tally virtual votes and ensure virtual participants can hear and participate in the caucus. A Zoom Manager may want assistance from additional volunteers.



## 5. Confirm your technology and meeting supplies

- Ensure your location has stable wifi, or bring a hotspot. Smart phones with unlimited data can often be used as a hotspot. Test your internet connection in advance of your caucus.
- Ensure you have at least two laptops-- one for the Zoom manager to work on, and one to face speakers at your podium or speaking area so Zoom participants can see speakers. Test using both laptops so there is no feedback from one laptop to another.
- Secure a microphone or speaker system that you know how to use so both in-person and virtual participants can hear. The Zoom manager may need to repeat questions from virtual participants or place the microphone to the computer's speakers.
- Have a sign in table, many pens, podium/table for speakers, table for Zoom manager, and sufficient seating for guests socially distanced. Also consider health measures like hand sanitizer and extra masks.
- Print the following documents and share the link to each in the Zoom chat:
  - i. Sign In Sheet
    - 1. <http://bit.ly/Caucus-Sign-In-Template>
    - 2. Hard copy on page 32
  - ii. Consent to Nominate (Delegate)
    - 1. <http://bit.ly/ConsentToNominate>
    - 2. Hard copy on page 39-41
  - iii. Consent to Nominate (Alternate)
    - 1. <http://bit.ly/ConsentToNominate>
    - 2. Hard copy on page 39-41
  - iv. Delegate Ballot (Google Form)
    - 1. Email [Convention@MassDems.org](mailto:Convention@MassDems.org) if you want MassDems to create electronic ballots
    - 2. Hard copy example on page 36-37
  - v. Alternate Ballot (Google Form)
    - 1. email [Convention@MassDems.org](mailto:Convention@MassDems.org) if you want MassDems to create electronic ballots
    - 2. Hard copy example on page 36-37
  - vi. Delegate Certification Form
    - 1. <https://bit.ly/DelAltExOCert2021>
    - 2. Hard copy on page 34
  - vii. Alternate Certification Form
    - 1. <http://bit.ly/Del-Alt-Cert-Form>
    - 2. Hard copy on page 35
  - viii. Add-On Application (Google Form)
    - 1. <http://bit.ly/Add-On-App>
    - 2. Hard copy on page 45
  - ix. One copy of the Method of Selecting Delegates
    - 1. Electronic form at <http://massdems.org/caucus>
    - 2. Hard copy on page 4
  - x. One Copy of the Preliminary Call to Convention
    - 1. Electronic form <http://massdems.org/caucus>

## 6. Secure a list of registered Democrats

Utilize Votebuilder during your caucus or obtain a copy of the most recent official voter registration of Democrats from your local election official before your caucus to verify individuals.

## 7. Confirm your Delegate allotment

Check your Delegate count in Addendum E of this document or online at MassDems.org under the “2021 State Convention” tab.

## During the Caucus

### 1. Setting up the meeting

- Arrive at your location at least an hour beforehand.
- Check wifi and ensure seating is appropriately spaced.
- Arrange your sign in table, speaker table and Zoom manager table with the appropriate documents and tools.
- Test the sound for Zoom participants.
- Cities whose wards meet in one location can disperse into separate ward groups.
  - Ward Chairs must run their caucuses independently, but they are encouraged to have a Zoom Manager/assistant to help.
- Open the Zoom room and physical sign-in AT LEAST 30 minutes beforehand.
- Chairs and Zoom managers should have copies of the relevant script in front of them before the meeting begins.

### 2. Registration

Registration shall open at least 30 minutes prior to the stated time of the caucus and remain open until all persons presenting themselves by 15 minutes after the stated time of the caucus have registered. Print off a [physical sign in sheet](#) (page 32 of this document) and have attendees sign in. Recommend that attendees bring their own pens, or sanitize pens in between use. Chairs with internet access may make a copy of our [templated Google Sheet](#). The Zoom manager should also use the google sheet if being used for physical sign in, or when registration closes 15 minutes after the stated caucus time, combine their registration sheet with the physical sheets so the chair has ONE list of voters and potential delegates.

- Volunteers may verify whether a caucus-goer is a registered or a pre-registered Democrat via the through Votebuilder or by contacting their local election official before the caucus for a list of current registered voters. Pre-registered Democrats must be 16 years old by June 15, 2021. Any person not shown on said party registration list must either provide proof of Democratic Party registration (or pre-registration) or register (or pre-register) prior to the close of the caucus registration period. If a voter cannot be found, they can register [here](#).
- While the Chair is explaining the caucuses and reading through introductory remarks, the Zoom Manager will be chatting virtual participants and (if applicable) asking in-person participants for their relevant information to look them up and confirm their voter registration status.

### 3. Close registration

Registration will close once all persons presenting themselves by 15 minutes after the stated time of the caucus have registered. The chair should collect the sign in sheets from the physical sign in manager and the Zoom manager. Ideally, the two volunteers will combine their list into one. This will give the chair a roster of those eligible to vote or run for Delegate or Alternate.

After registration has closed and you have a full roster of voters, you will begin your caucus script. Some chairs choose to allow guest speakers during this window.

### 4. Agenda

The agenda contains seven components:

- A. Introduction and overview
- B. Affirmative Action Statement
- C. Review the rules (the Method of Selecting Delegates)
- D. Ex-Officio Delegates
- E. Letter from the Chair
- F. Delegate fee waiver
- G. The nomination and election of Delegates and Alternates

#### *A) Introduction and overview*

Introduce yourself and your caucus volunteers. Explain what the Democratic State Convention is, what the caucus is (electing the Delegates and Alternates from our community to the Convention), and what a Delegate does. Those who run for Delegate or Alternate should ensure that they are available all day on Saturday, September 25, to participate in the Convention virtually or in-person.

#### *B) Affirmative Action Statement*

Explain that the party strives to ensure Delegate representation that reflects the whole community, and thus has a number of Add-On seats, chosen by the State Committee, in the following categories: Disabled, Minority, Youth, and LGBTQ+. Anyone who is eligible to run for Delegate or Alternate can apply to be an Add-On Delegate. The deadline to apply is August 6, 2021 at 5:00pm. You may read Section 7 from The Massachusetts Democratic Party Charter aloud. (See Addendum).

#### *C) Review the Rules*

Enclosed in this document is the "Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention." It is also available online at the State Party's website.

To run for Delegate or Alternate, one:

- Must be registered or pre-registered Democrat in the Town or Ward by the time of the Caucus. Pre-registered Democrats must be 16 by June 15, 2021.
- Cannot have publicly supported or endorsed any candidate opposing a nominee of the Democratic Party in the current or previous partisan election while registered as a Democrat. If an individual was not a member of the Democratic Party at the time of such support, this restriction does not apply. (If an individual endorsed any candidate opposing a nominee of the Democratic Party in a Statewide or Presidential race, they cannot be elected Delegate or Alternate for 4 years; for all other local down ballot offices, 2 years.).

#### *D) Ex-Officio Delegates*

Certain Democratic Party leaders and elected officials are considered Ex-Officio Delegates, meaning they do not have to run at Caucus to become Delegates, and do not count against the community's total allotted number of Delegates. This includes you as Chair (or your next- ranking designee if you can't attend), members of the Democratic State Committee, and certain elected officials (including State Legislators). Note that the Chair at the time of the Convention is the Ex-Officio Delegate. For committees with co-chairs, the full committee must vote to determine who will receive the Ex-Officio spot, and the other chair is free to run as a Delegate. For a list of offices included as Ex-officio Delegates, please see Section 31 of The Method of Selecting Delegates.

*E) Letter from the Chair*

Please read the enclosed welcome letter from Chair Gus Bickford aloud.

*F) Delegate fee waiver*

Delegates and Alternates both pay a small fee to take part in the Convention, which helps the Party defray the substantial cost. Note that this fee is \$75 for both Delegates and Alternates, due by August 13, 2021. Highlight that a Fee Waiver process is available for anyone who finds the cost of the fee to be prohibitive, and that you have Fee Waiver forms available on hand.

## 5. Voting & Nominations

Remember that no nominating or balloting to elect Delegates or Alternates may occur until after the 15 minute grace period for registration has passed. For example, if your caucus is scheduled for 10am, and someone arrives at 10:15am, they must be registered for the caucus before nominating and balloting begins.

**Same-day registration:** Voters who register to vote as Democrats at the time of the Caucus are eligible to participate.

**Pre-registered voters:** A pre-registered Democrat who resides in your town or ward and will be 16 years old by June 15th, 2021 can participate in the caucus, run for Delegate or Alternate, and vote for Delegate or Alternate.

**Non-binary delegate apportionment:** We have worked to make the caucus process more inclusive by allowing self-identified non-binary individuals to run for Delegate as non-binary rather than running as either male or female. If self-identified male, female, and non-binary candidates are nominated, one open ballot will be used to elect all the delegates. The gender identity of the top vote-getter will determine how the gender of the remaining seats are determined. Non-binary candidates will not count towards a gender. For instance, if the top vote-getter identifies as female, the next delegate slot will go to someone who identifies as either male or non-binary. If a non-binary identifying candidate is elected to that slot, the next seat will again go to someone who identifies as male or non-binary. If a male-identifying candidate is elected, the next seat will go to someone who identifies as either female or non-binary. This process will continue until all seats are filled or all nominees are elected. If no non- binary candidates are nominated, committees can use separate ballots as done in past years. A more thorough explanation is provided in the One Ballot Process section of this document.

Nominations will be taken on the floor by the Chair. Virtual participants can nominate people verbally, or chat their nominees to the Zoom Manager. The Chair should read off all nominees to ensure they have not missed anyone. Anyone who is nominated MUST have filled out a Consent to Nominate form. Chairs and Zoom Hosts

will NOT be able to see who has submitted their Consent to Nominate form, so the Chair must verbally confirm that all nominees for Delegate consented to be nominated for a Delegate seat, and all nominees for alternate have consented to be nominated for an alternate seat.

Secret balloting is discouraged this year because caucuses will likely have participants who will participate via Zoom. Instead, you should plan on doing a roll call vote of all eligible voters. Alternatively, you could conduct balloting through a google form created beforehand, or if your membership would still like to ballot, have Zoom participants chat their votes to the Zoom manager, or relay them to the Zoom manager over the phone.

Please refer to the Chair Script (page 46 of this document) for step-by-step directions of what to do once your caucus officially begins.

## **Post-Caucus**

- Mail the following documents to 11 Beacon St., Suite 410, Boston, MA 02108 within 7 days of your caucus. Materials must be mailed by August 6th **at the latest**:
  - Caucus Sign-In Sheet
  - Consent to Nominate Form(s)
  - Chair Certification Form
  - Delegate/Alternate/Ex-Officio Certification Forms
  - Add-On Delegate Forms (if applicable)
  - Payment Forms (if applicable)
  - Fee Waiver Forms (if applicable)
- On your hard copy submissions of the consent to nominate forms, please write (virtual) next to each virtual candidate in lieu of their signature
- **In addition** to mailing in the required forms, complete this online caucus certification form: <http://bit.ly/chaircertification>
  - If you are unable to fill out this form, you can email a scan of your results to [Convention@massdems.org](mailto:Convention@massdems.org) in **addition** to mailing in the required forms.
- Request that Delegates, Alternates, and Ex-Officio Delegates fill out the Post-Caucus Delegate/Alternate Form: <https://bit.ly/DelAltExOCert2021>

# Tips for Running a Successful Virtual Caucus

Committees should use Zoom Pro accounts, as meetings will likely go over 40 minutes. If you expected over 100 attendees, please contact MassDems for support. You will need to provide a Zoom link when you announce your caucus, so please do this as a first step.

To access Zoom Pro:

- Check with members of your Town/City Committee or [local state committee members](#) if anyone has access to a Pro-level Zoom account. This will likely be the easiest route.
- Purchase a [Pro Zoom account](#) for \$14/mo
- Check with MassDems at [convention@massdems.org](mailto:convention@massdems.org) to ask if there are available Zoom licenses.

## Pre-Caucus

*Below are the steps necessary to begin planning your virtual caucus, including: scheduling, notifying your community, verifying that voters are registered or pre-registered Democrats, and assembling your necessary electronic documents*

1. Schedule your caucus.
  - If you are planning on requesting a MassDems volunteer assist in facilitating your committee's caucus, please review the process on page 12 and see our available time slots at <http://bit.ly/FacilitatedCaucusSignUp>.
2. Notify registered Democrats in your town or ward of the caucus through local media no sooner than thirty and at least nine days before caucus. See Addendum C for a list of minority media outlets.
3. Obtain a copy of the most recent official voter registration of Democrats from your local election official or use a Votebuilder account to verify individuals virtually.
4. Recruit a volunteer to assist with registration and balloting during the caucus
  - We recommend that every chair has at least two volunteers who can provide technical assistance throughout the caucus. One volunteer should be the "host" of the Zoom, monitoring responses from Google Forms and Zoom registrations, while the other serves to check in participants and verify voter registration status
  - If the Zoom Manager and the Chair are in the same room together: the Zoom Manager's microphone is turned **ON** and the camera is turned **ON**. The Chair's camera is **ON**, microphone is **MUTED** and the **computer's sound** is turned **OFF**. Failure to have Chair's audio and microphone turned off will result in audio-feedback. The Chair will have to speak loudly enough to be heard through the Zoom Manager's microphone. **Please test your set up in advance of the meeting.**
  - Larger committees may need more volunteers
  - Check your Delegate count in Addendum E or online at MassDems.org under the "2021 State Convention" tab
5. Ensure access to:
  - [Sign In Sheet](#)
  - [Delegate Ballot \(Google Form\)](#)
  - [Alternate Ballot \(Google Form\)](#)
  - [Delegate Certification \(Google Form\)](#)
  - [Alternate Certification \(Google Form\)](#)
  - [Add-On Application \(Google Form\)](#)
  - (1) Method of Selecting Delegates: <http://massdems.org/caucus>
  - (1) Preliminary Call to Convention: <http://massdems.org/caucus>



## Setting up Your Zoom

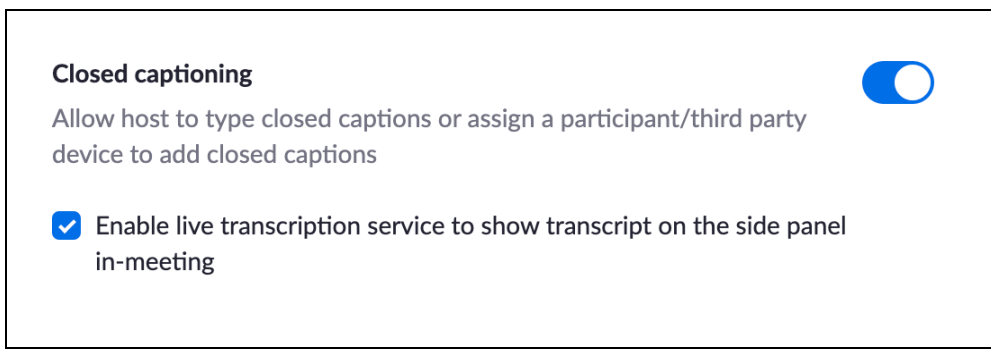
*This section details the setting you will need to turn on prior to beginning your caucus. Larger caucuses (such as cities that have all their wards meet at once) may need to enable breakout rooms.*

### **Enable “Registration: required”**

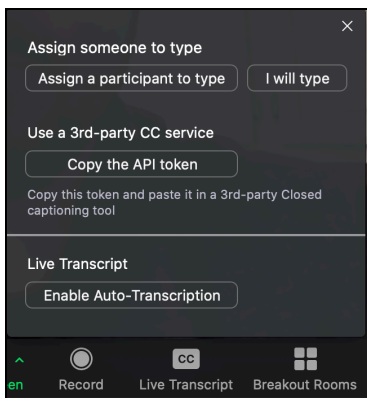
1. Log into the Zoom web portal to create the link for your caucus.
2. Underneath the date, time, and time zone functions, check the box to require registration to the Zoom meeting. The creator of the Zoom link will be able to see who has registered for the meeting in advance of the caucus.

### **Enable subtitles**

1. Log into the Zoom web portal and access Settings—> In Meeting (Advanced)—> Closed captioning
2. Click the toggle button to enable Closed captioning then check the box next to Enable live transcription service to show transcript on the side panel in-meeting



At the start of a meeting, the host will click the Live Transcript button and Enable Auto-Transcription:

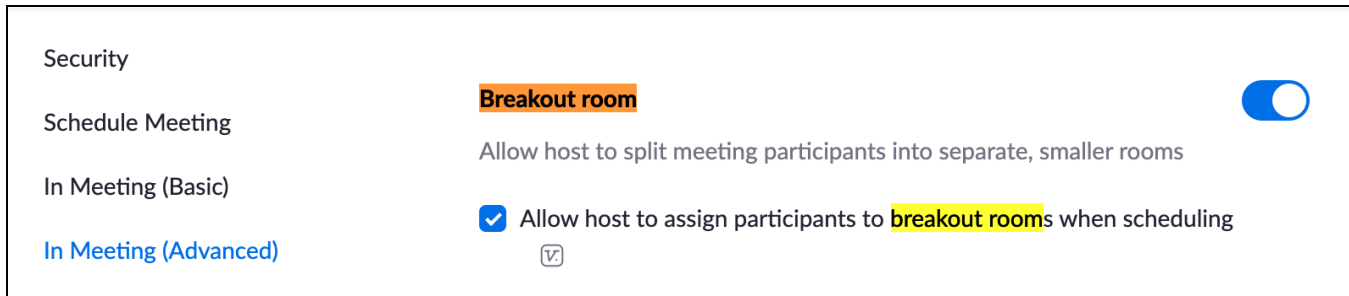


**Note:** The default subtitle font size is small. In order for participants to [increase their font size](#), they must:

1. Sign in to your Zoom desktop application
2. Click on your profile photo in the top right
3. Open up settings
4. Click accessibility
5. Drag font size bar to the right

## Enable Breakout Rooms

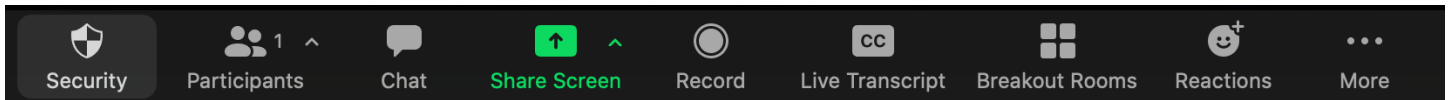
1. Sign in to the Zoom web portal



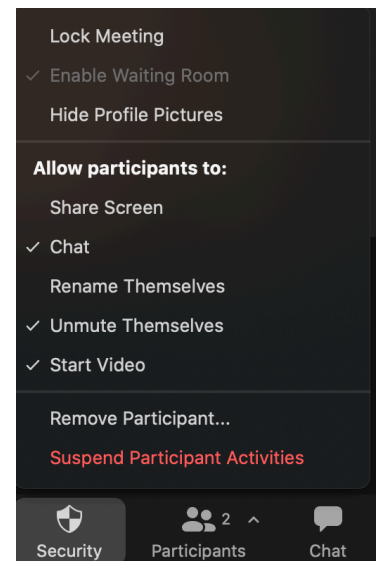
2. On the left, click Account Management then Account Settings.
3. Click on the Breakout Room option on the Meeting tab and make sure the setting is turned on.

## Zoom Permissions and Security

1. The Zoom host should ensure that participants **cannot** rename themselves and that they **cannot** share their screen. The Zoom host will be renaming participants during the registration process, and disabling screen share abilities helps prevent Zoom bombing and technical errors.
2. The Zoom host can toggle these settings either on the Zoom browser beforehand, or at the start of the meeting by moving their cursor to the bottom of the screen and clicking on 'Security.'



3. Once the Zoom host has clicked on security, they can make sure that Chat, Unmute Themselves, and Start Video functions are checked on, **but "Rename Themselves" and "Share Screen" functions are checked off.** After the 15 minutes have elapsed at the start of the caucus, only members must have signed in during the 15 minute window will be eligible to vote.

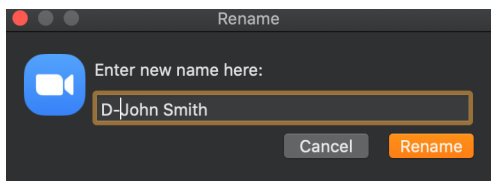
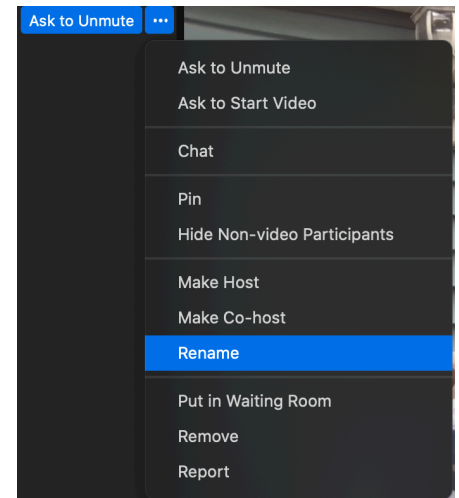


## During the Caucus

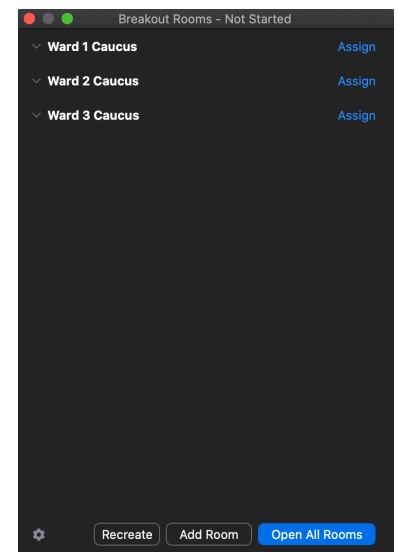
*This section explains how a Zoom manager admits and renames participants and moves people into breakout rooms (if need be).*

### Setting up the meeting

1. The Zoom manager will begin admitting participants who are in the waiting room.
2. As participants join, the Zoom manager can begin verifying the registration status of participants and determining who is eligible to vote in the caucus and who is a guest. The Zoom Manager should begin renaming Zoom participants to differentiate between eligible caucus voters and guests. Eligible voting participants can be renamed to have a 'D' next to their name and guests can be named to have a 'Guest' next to their name. For example, preregistered Democrat John Smith can be renamed "D-John Smith" while unenrolled voter Mary Jones can be renamed "Guest-Mary Jones."



3. Participants may join up until 15 minutes after the advertised start time. Participants who join after the 15 minute window will be ineligible to vote during the caucus but may remain as guests. Participants who joined during the window but exit the virtual caucus (poor internet connection, etc.) are allowed to rejoin the caucus and remain as voting participants.
4. For larger caucuses, or cities that have their wards caucus at once, Chairs may then move to arrange voting members of the caucus into breakout rooms. Each ward should have its own breakout room so that members of that ward may meet, discuss, and ultimately vote. If you are a single town or ward voting, you may opt to just remain in the main room.



## **Sign-In Sheet**

MassDems recommends using a copy of our [templated Google Sheet](#). The Zoom manager can sign in each attendee personally and then circulate for corrections via Zoom chat.

## **Voter Registration**

Chairs may verify whether a caucus-goer is a registered or a pre-registered Democrat via Votebuilder or by contacting their local election official for a list of current registered voters. **Review the list of Zoom registrants 24 hours in advance** and verify voter registration status of all who have registered in order to expedite the process during the caucus.

## **Agenda**

The agenda contains seven components:

- A. Introduction and overview
- B. Affirmative Action Statement
- C. Review the rules (the Method of Selecting Delegates)
- D. Ex-Officio Delegates
- E. Letter from the Chair
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### *A) Introduction and overview*

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#### E) Letter from the Chair

Please read the enclosed welcome letter from Chair Gus Bickford aloud.

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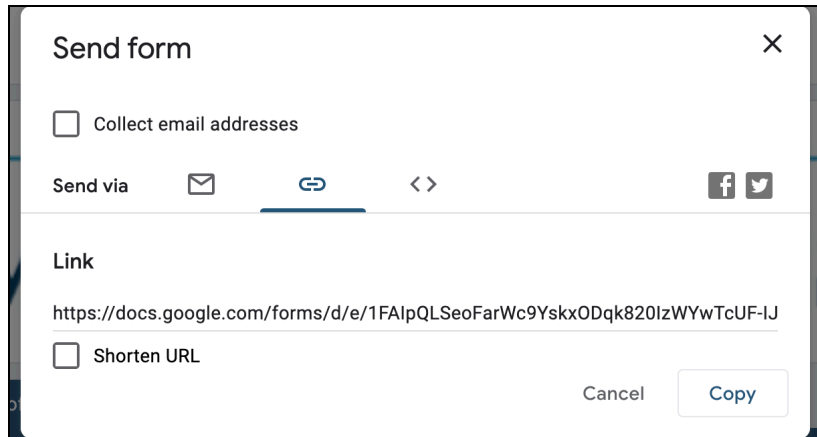
### **Virtual Voting**

*This section discusses the different options available for voting during a virtual caucus. Due to the fact that committees are advised to caucus virtually, completely secret balloting is not possible this year.*

Chairs have discretion to conduct voting however they deem appropriate such as a private Zoom chat to the Zoom manager or a voice vote. Another option is to create Google Form ballots; this may be helpful for larger, contested ballots. MassDems has created a sharable template [Google Form](#) ballot which MassDems can duplicate and provide copies for committees, or committees can make their own online. Committees that would like MassDems to provide copies of Google Form ballots should email [Convention@MassDems.org](mailto:Convention@MassDems.org).

#### **In order to distribute Google Form ballots,**

1. Type in the candidates' names both the Alternate Ballot and Delegate Ballot. Examples of these ballot forms are available here:
  - [Delegate Ballot \(Google Form\)](#)
  - [Alternate Ballot \(Google Form\)](#)



for

2. Click the large Send button in the upper right corner.
3. Click on the middle, hyperlink icon (it looks like a paperclip) and then click on the Copy button to copy the link.
4. If the only people on the Zoom are registered and pre-registered Democrats, the Chair may simply drop the link to the Google Form in the chat. However, if a caucus has guests and non-voting members, a

Chair should email the link to each person who has signed into the meeting. In order to verify the ballot, the ballot must require a voter's email and phone number as credentials.

5. Voters may use a phone and call into the Zoom meeting. They will have the ability to mute and unmute themselves (\*6) and raise and lower their hand (\*9). You will need to be sure that they are able to vote as well, using whatever method other participants are. One option is to have them call a specified volunteer, who will complete their Google Form ballot for them.
6. Once all votes have been cast, the Chair can view responses by clicking on the Responses tab at the top of the Google Form and see the tabulated results.

Remember that no nominating or balloting to elect Delegates or Alternates may occur until after the 15 minute grace period for registration has passed. For example, if your caucus is scheduled for 10am, and someone arrives at 10:15am, they must be registered for the caucus before nominating and balloting begins.

**Same-day registration:** Voters who register as Democrats at the Caucus may participate.

**Pre-registered voters:** A pre-registered Democrat who resides in your town or ward and will be 16 years old by June 15th, 2021 can participate in the caucus, and run or vote for Delegate or Alternate.

**Non-binary delegate apportionment:** We have worked to make the caucus process more inclusive by allowing self-identified non-binary individuals to run for Delegate as non-binary rather than running as either male or female. If self-identified male, female, and non-binary candidates are nominated, one open ballot will be used to elect all the delegates. The gender identity of the top vote-getter will determine how the gender of the remaining seats are determined. Non-binary candidates will not count towards a gender. For instance, if the top vote-getter identifies as female, the next delegate slot will go to someone who identifies as either male or non-binary. If a non-binary identifying candidate is elected to that slot, the next seat will again go to someone who identifies as male or non-binary. If a male-identifying candidate is elected, the next seat will go to someone who identifies as either female or non-binary. This process will continue until all seats are filled or all nominees are elected. If no non-binary candidates are nominated, committees can use separate ballots as done in past years. A more thorough explanation is provided in the One Ballot Process section of this document.

## **Post-Caucus**

- The Chair must still complete and mail hard copies of the following documents to 11 Beacon St., Suite 410, Boston, MA 02108 within 7 days of your caucus. Fill out these hard copies as you go along, or do it at the end. Materials must be mailed by August 6th **at the latest**:
  - Caucus Sign-In Sheet
  - Consent to Nominate Form(s) (On your hard copy submissions of the consent to nominate forms, please write (virtual) next to each virtual candidate in lieu of their signature)
  - Chair Certification Form
  - Delegate/Alternate/Ex-Officio Certification Forms
  - Add-On Delegate Forms (if applicable)
  - Payment Forms (if applicable)
  - Fee Waiver Forms (if applicable)
- In addition to mailing in the required forms, Chairs should fill out this online caucus certification form: <http://bit.ly/chaircertification> (If you are unable to fill out this form, you can email your results to [Convention@massdems.org](mailto:Convention@massdems.org) in addition to mailing in the required forms.)
- Chairs should also request that Delegates, Alternates, and Ex-Officios fill out the Post-Caucus Delegate/Alternate Form: <https://bit.ly/DelAltExOCert2021>



# Explanation of How to Conduct a One Ballot Caucus

## Changes to Caucuses

In order to create a more inclusive caucus and convention process, the State Committee voted to amend the current delegate selection process. Now, candidates for delegate who identify as non-binary can run at their caucus without having to identify themselves as male or female. This change does not alter most of the caucus process, but this document will serve as a guide to understand how this change will be implemented. This process is based on one's personal identity — should an individual identify themselves as non-binary, the caucus will use a single ballot to elect delegates or alternates.

## Overview

All candidates' names will be placed on one ballot. Voters will vote on all candidates at the same time and are allowed one vote per candidate and as many votes as total delegate positions available (i.e., if there are 5 allocated delegates, voters may vote for up to 5 candidates). When participants cast their votes for male or female candidates, the total number of votes for candidates of one gender on a ballot may only be half of the total allocation (plus one if the allocation is an odd number), with non-binary individuals not counting towards the gender totals.

For example:

### **Voters in Towns with 2 elected delegates allocated may elect:**

- a) 1 female delegate and 1 male delegate OR
- b) 1 female delegate and 1 non-binary delegate OR
- c) 1 male delegate and 1 non-binary delegate OR
- d) 2 non-binary delegates

### **Voters in Towns with 3 elected delegates allocated may elect:**

- a) 2 female delegates and 1 male delegate OR
- b) 2 male delegates and 1 female delegate OR
- c) 1 female delegate, 1 male delegate and 1 non-binary delegate OR
- d) 2 non-binary delegates and 1 female delegate OR
- e) 2 non-binary delegates and 1 male delegate OR
- f) 3 non-binary delegates

Delegations to the Convention must be gender-balanced, so there should be an equal number of male and female-identifying delegates. To achieve "gender balance" using one ballot, non-binary individuals will not count towards your gender balance total. They will just reduce the total number of delegates you are attempting to balance. **For example, if you are allocated 7 delegates, and one elected delegate is non-binary, then you must have gender balance among the remaining 6 delegates.**

## Voting for Delegates

The total number of votes on a ballot may not be **more** than the number of delegates allocated, though the number may be less. When participants cast their votes for male or female candidates, the total number of votes for candidates of one gender on a ballot may only be half of the total allocation. For committees with an odd-numbered allocation, your final delegate spot may go to someone of any gender. The total number of votes cast for non-binary candidates may be no more than the total number of delegates allocated. A delegate candidate may only receive one vote per ballot.

## **Order of Delegates**

After all candidates have been nominated and your caucus has voted, the first step is determining which gender is seated first. To achieve gender balance, the gender identity of the top vote-getter will determine how the gender of the remaining seats are determined.

For instance, if the top vote-getter identifies as female, the next delegate slot will go to the next top vote-getter who identifies as either male or non-binary. If a non-binary-identifying candidate is elected to that slot, the next seat will again go to the next top vote-getter who identifies as male or non-binary. If a male-identifying candidate is elected, the next seat will go to someone who identifies as either female or non-binary.

If the top vote-getter identifies as non-binary, the next delegate slot will go to the next top vote-getter who identifies as female, male or non-binary. If a male-identifying candidate is elected to that slot, the next seat will go to the next top vote-getter who identifies as female or non-binary. If a female-identifying candidate is elected, the next seat will go to someone who identifies as either male or non-binary.

Using the same election results that you used to determine the top vote getter, you will distribute positions by alternating genders with non-binary candidates not counting towards a gender category. So, if your top vote getter is a female, you would award the next delegate position to the male candidate who received the next most votes, then the female candidate, and so on. Since non-binary candidates do not affect either category, they will secure a delegate position should they receive more votes than the next candidate you are seating.

**When a non-binary gender candidate is seated, the gender that is seated after them is the opposite of the gender of the delegate seated before them.**

If there is a tie for the last delegate position, you will use additional ballots to determine the outcome of the tie between the remaining eligible candidates (i.e. if you have 2 female seats remaining and three female delegates tied, voters would be cast 2 votes between the three remaining candidates.)

## **Terms & Definitions**

Source: Trans Student Educational Resources

- *sex*: a biological determinant based on chromosomes, physical anatomy, and hormones; typically assigned at birth
- *gender*: an individual's internal sense of being male, female, both, neither, or another gender
- *gender binary*: the classification of gender as either male or female; presents masculine and feminine identities as being distinctly opposite
- *non-binary*: an individual whose gender identity is not male or female; non-binary individuals could identify as neither male nor female, as some combination of the two, or another gender; often used as an umbrella term
- *cisgender*: means someone who identifies as their sex assigned at birth
- *transgender*: a person whose gender identity does not match their sex assigned at birth
- *gender presentation/expression*: the way an individual presents their gender through fashion, hairstyles, voice, etc. Gender expression is not necessarily indicative of one's gender identity or sexuality

## **How to have an inclusive caucus process**

As we create a more inclusive caucus process, it is important that everyone remains respectful. There are a few ways to ensure that caucuses are welcoming environments. Remember, this process is about self-identification — how a person looks or speaks does not determine their gender identity. This is determined based on how they identify to others and refer to themselves.

1. Encourage people to share their pronouns when they introduce themselves.

- a. "Hi, I'm Sarah; my pronouns are she, her, and hers."
  - b. "My name is Nick; my pronouns are he, him, and his."
  - c. "I'm Jade, and my pronouns are they, them, theirs."
2. Per the Method of Selecting Delegates, nominations shall be made from the floor and will include the candidate's name and self-identified gender. When individuals complete the consent to nominate forms, they will put their gender identity under the 'gender' column. This will be used to indicate the use of one universal ballot or two separate ballots for males and females.

\*MassDems is using language to respect the full inclusion of non-binary members and Delegates and have adjusted language as allowable within DNC rules/guidelines/approved language.

# Sample Media Advisory

## MEDIA ADVISORY

For [DATE OF THE CAUCUS]

## CONTACT

[Name], [Affiliation], [Phone Number], [Email]

### **[TOWN/WARD] TO ELECT DELEGATES TO DEMOCRATIC STATE CONVENTION**

Registered Democrats in [TOWN/WARD] will hold a caucus on [DATE] at [LOCATION] to elect Delegates and Alternates to the 2021 Massachusetts Democratic State Convention. The caucus will take place [virtually OR in-person following health guidelines with an option to participate virtually]. Democrats who wish to participate virtually may register at [ZOOM REGISTRATION LINK].

This year's state convention will be held on September 25th (location forthcoming), where Democrats from across the state will come together to adopt a Party platform, discuss Party business and celebrate our successes as we prepare for upcoming elections. The event will take place in-line with all federal, state and local health guidelines and will include a virtual option for participation.

The caucus is open to all registered and pre-registered Democrats in [TOWN/WARD]. Pre-registered Democrats who will be 16 by June 15, 2021 will be allowed to participate and run as a Delegate or Alternate. [TOWN/WARD] can elect XX Delegates and XX Alternates to the Convention.

Youth, minorities, people with disabilities, and LGBTQ+ individuals who are not elected as a Delegate or Alternate may apply to be an Add-on Delegate at the caucus or at [www.massdems.org](http://www.massdems.org) by August 6, 2021.

Those interested in getting involved with the [TOWN/WARD] Democratic Town Committee should contact [NAME] at [PHONE NUMBER] or visit our website at [URL].

###

### **CHAIRS, PLEASE NOTE:**

If you have questions or would like assistance with media outreach and/or distributing press releases, please contact State Party Communications Director, Allison Mitchell, at [Allison@massdems.org](mailto:Allison@massdems.org)

# Important Forms and Links

## Digital Links of All Forms

1. Caucus Sign In: <http://bit.ly/Sign-In-Tally-Sheet>
2. Chair Certification Form: <http://bit.ly/chaircertification>
3. Delegate Certification Form: <https://bit.ly/DelAltExOCert2021>
4. Alternate Certification Form: <https://bit.ly/DelAltExOCert2021>
5. Example Delegate Ballot: <http://bit.ly/SampleDelBallot>
6. Example Alternate Ballot: <http://bit.ly/SampleAltBallot>
  - a. Committees that want MassDems to create electronic ballots for them should email [Convention@MassDems.org](mailto:Convention@MassDems.org)
7. Sample Tally Sheet: <http://bit.ly/Sign-In-Tally-Sheet>
8. Consent to Nominate Form: <http://bit.ly/ConsentToNominate>
9. Delegate/ Alternate Payment Form: <http://bit.ly/Del-Alt-Payment-Form>
10. Delegate/ Alternate Fee Waiver Form: <http://bit.ly/Fee-Waiver>
11. Add-On Application: [bit.ly/Add-On-App](http://bit.ly/Add-On-App)
12. 2021 Method of Selecting Delegates: 2021 State Convention tab of MassDems.org
13. 2021 Preliminary Call to Convention: 2021 State Convention tab of MassDems.org
14. 2021 Delegate and Alternate Allocation: 2021 State Convention tab of MassDems.org

## 2021 Caucus Sign-In

Chairs: Please print multiple copies of this form. Registration must be open 30 minutes prior to the state of your caucus, and remain open 15 minutes past the posted start time of your caucus.

Name (First, MI, Last):		
Address:		
City/Town:	ZIP:	Ward:
Email:	Phone:	
<input type="checkbox"/> I am a registered Democrat from this town or ward and will be voting today. You may register here!		
<input type="checkbox"/> I am a guest.		

Name (First, MI, Last):		
Address:		
City/Town:	ZIP:	Ward:
Email:	Phone:	
<input type="checkbox"/> I am a registered Democrat from this town or ward and will be voting today. You may register here!		
<input type="checkbox"/> I am a guest.		

Name (First, MI, Last):		
Address:		
City/Town:	ZIP:	Ward:
Email:	Phone:	
<input type="checkbox"/> I am a registered Democrat from this town or ward and will be voting today. You may register here!		
<input type="checkbox"/> I am a guest.		

Name (First, MI, Last):		
Address:		
City/Town:	ZIP:	Ward:
Email:	Phone:	
<input type="checkbox"/> I am a registered Democrat from this town or ward and will be voting today. You may register here!		
<input type="checkbox"/> I am a guest.		



## 2021 Chair Certification Form

\_\_\_\_\_ (City/Town), \_\_\_\_\_ (Ward)

PLEASE PRINT NEATLY (all fields are required):

These forms have been completed by: \_\_\_\_\_ (Chair)

Address: \_\_\_\_\_

City: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

I hereby certify the following:

1. I have read the 2021 Method of Selecting Delegates in its entirety.
2. These forms are accurate and complete. All Delegates and Alternates have been elected according to the rules set forth by the Massachusetts Democratic State Committee.
3. I have elected the correct number of female and male delegates by verifying my delegate allocation.
4. I have mailed hard copies of my Town's/Ward's caucus sign-in sheets, male consent to nomination/vote tabulations, female consent to nomination/vote tabulations, any gender consent to nomination/vote tabulations (if applicable), and delegate and alternate certification forms to the Party at 11 Beacon Street, Boston, MA 02108.
5. I understand that I am required to retain a copy of all the documents mentioned above and have done so.

\_\_\_\_\_  
Caucus chair signature

\_\_\_\_\_  
Date

### IMPORTANT INFORMATION

- Any registered Democrat may run to be a delegate to the Convention.
- Should fewer candidates of a specified gender than the number allotted run for a seat, they may be elected by acclamation.
- Elections for seats of Any Gender should occur AFTER the Male and Female seat elections conclude.
- Any candidate may run for an Any Gender seat, regardless of whether they ran for a Male or Female seat previously.
- Chairs are Ex Officio delegates to the convention and are NOT included in the delegate allocation.

## 2021 Delegate Certification Form

City/ Town:

Ward ( if applicable):

**Delegates: Please fill out your section in its entirety, otherwise your certification is not complete.**

Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		
Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		
Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		

## 2021 Alternate Certification Form

City/ Town:

Ward ( if applicable):

**Alternates: Please fill out your section in its entirety, otherwise your certification is not complete.**

Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		
Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		
Name (First, MI, Last):		gender:
Address:		DOB:
City/Town:	Zip:	Ward:
Phone:	Email:	
<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian- American <input type="checkbox"/> Native American <input type="checkbox"/> Cape Verdean <input type="checkbox"/> White <input type="checkbox"/> Disabled <input type="checkbox"/> mobility restrictions		
<input type="checkbox"/> Lesbian <input type="checkbox"/> Gay <input type="checkbox"/> Bisexual <input type="checkbox"/> Transgender <input type="checkbox"/> Queer+ <input type="checkbox"/> Need Listening Device <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/ Captioning needed		
<i>I have completed this form to the best of my ability (sign):</i>		

## Sample Ballots: One Ballot

*This is only a sample ballot. Please modify this format to fit your needs.*

### One Ballot System:

#### 2021 MassDems Platform Convention

Ballot for **ALL** Delegates

You may select up to 3 candidates.

You may select:

2 female delegates and 1 male delegate OR  
2 male delegates and 1 female delegate OR  
1 female delegate, 1 male delegate and 1 non-binary delegate  
OR  
2 non-binary delegates and 1 female delegate OR  
2 non-binary delegates and 1 male delegate OR  
3 non-binary delegates

Order DOES NOT matter. Please print their first and last name clearly.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

## Sample Ballots: Two Ballot System

*This is only a sample ballot. Please modify this format to fit your needs.*

*This set of sample ballots is for the election of 7 Delegates, meaning 3 male, 3 female and one any gender Delegate.*

### 2021 MassDems Platform Convention

Ballot for **MALE** Delegates

Please vote for MALE Delegates ONLY.

You may select up to 3 candidates. Order DOES NOT matter. Please print their first and last name clearly.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### 2021 MassDems Platform Convention

Ballot for **FEMALE** Delegates

Please vote for FEMALE Delegates ONLY.

You may select up to 3 candidates. Order DOES NOT matter. Please print their first and last name clearly.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### 2021 MassDems Platform Convention

Ballot for **ANY GENDER** Delegates

You may select up to 1 candidate. Please print their first and last name clearly.

1. \_\_\_\_\_

## **Sample Tally Sheet**

Use this sample as a guide to tally votes. Each hash mark “|” represents one vote. Counting in groups of five can make it easier to total the overall votes for each candidate.

Candidate Name	5	10	15	20	25	Total Votes
Candidate 1						19
Candidate 2						13
Candidate 3						25
Candidate 4						17
Candidate 5						23

Create a tally sheet for each category: Male Delegate, Female Delegate, Any Gender Delegate, Alternate.

Print extra tally sheets to accommodate any number of candidates running to be elected.



## ***Consent to Nominate & Vote Tabulation: MALE***

Chairs: Please have all male candidates sign this form. Print multiple copies.

I hereby consent to nomination for DELEGATE for the 2021 Democratic State Convention. DELEGATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

I hereby consent to nomination for ALTERNATE for the 2021 Democratic State Convention. ALTERNATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				

## ***Consent to Nominate & Vote Tabulation: FEMALE***

Chairs: Please have all female candidates sign this form. Print multiple copies.

I hereby consent to nomination for DELEGATE for the 2021 Democratic State Convention. DELEGATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

I hereby consent to nomination for ALTERNATE for the 2021 Democratic State Convention. ALTERNATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				

## ***Consent to Nominate & Vote Tabulation: ANY GENDER***

Chairs: If you are conducting a single ballot, please have all candidates sign this form. If you are conducting male/female ballots, use this form if you have an odd number of seats. Print multiple copies.

I hereby consent to nomination for DELEGATE for the 2021 Democratic State Convention. DELEGATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

I hereby consent to nomination for ALTERNATE for the 2021 Democratic State Convention. ALTERNATE CANDIDATE Name (First, MI, Last):	NUMBER of votes: Ballot 1	NUMBER of votes: Ballot 2	NUMBER of votes: Ballot 3	NUMBER of votes: Ballot 4
1.				
2.				
3.				
4.				

## ***Delegate & Alternate Payment Form***

Please print clearly. Only Delegates and Alternates should complete this form. Please complete your fee by August 13, 2021.

We encourage everyone to pay their Convention fee online via our secure ActBlue link:  
<https://secure.actblue.com/donate/mdpconvention2021>

Credit Card: Pay online at <https://secure.actblue.com/donate/mdpconvention2021>

Check:

Checks can be made payable to MASSACHUSETTS DEMOCRATIC PARTY and sent to Party HQ at 11 Beacon Street, Ste 410, Boston, MA 02108.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/Town: \_\_\_\_\_ ZIP: \_\_\_\_\_ Ward: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

I am an:     ☐ Elected Delegate   ☐ Elected Alternate   ☐ Ex Officio Delegate

Please indicate the total amount enclosed:

- ☐ \$75 Delegate Fee
- ☐ \$75 Alternate Fee
- ☐ \$50 Senior (65+)/Student/Disabled Fee
- ☐ Additional donation to help defray the costs of the Convention:

\$10   \$15   \$25   \$50   \$100   Other: \_\_\_\_\_

If you are paying for persons other than (or in addition to) yourself, please list their full names here:

Campaign finance law requires us to collect your occupation and employer.

Occupation and Employer:

## Delegate & Alternate Fee Waiver Form

Please print clearly. Only Delegates and Alternates should complete this form. The deadline to submit this form is August 13, 2021.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/Town: \_\_\_\_\_ ZIP: \_\_\_\_\_ Ward: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

I am an: ☐ Elected Delegate ☐ Elected Alternate ☐ Ex Officio Delegate

Answers to the following questions are required:

Paying the full fee to the 2021 Democratic Party Convention would be a financial hardship. I am requesting a:

- ☐ Full waiver
- ☐ Partial waiver
- ☐ Please specify the amount you can pay: \_\_\_\_\_

My family size is: \_\_\_\_\_

My annual income is: \_\_\_\_\_

I am a student at (if applicable): \_\_\_\_\_

Other circumstances to be taken into consideration:

I certify that the statements above are true and accurate to the best of my knowledge and that I have been elected as a delegate or an alternate to the 2021 Democratic Convention.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Massachusetts Democratic Party Add On Application

Chairs: Please make copies for your caucus.

Name (First, MI, Last):		Gender:
Address:		DOB:
City/Town:	ZIP:	Ward:
Phone:	Email:	
<input type="checkbox"/> Listening device needed <input type="checkbox"/> Wheelchair needed <input type="checkbox"/> ASL/captioning needed <input type="checkbox"/> Mobility Restrictions		

Please mark off the add-on categories you would like to be considered for:

☐ YOUTH Applicants must be at least age 16 by June 15, 2021 and 35 or younger as of September 25, 2021. The youth add-on process gives preference to those who attended their local caucus or are active in Democratic organizations.

I attended my caucus: ☐ Yes ☐ No      I am active in a Democratic Organization: ☐ Yes ☐ No

If yes, please specify the organization: \_\_\_\_\_

☐ MINORITY Applicants include Blacks, Hispanics, Asian Americans, Native Americans, and Cape Verdeans. Under the Method for Selecting Delegates, unsuccessful candidates for Delegate are given first preference in the minority add-on application process.

I am:    ☐ Black    ☐ Hispanic    ☐ Asian-American    ☐ Native American    ☐ Cape Verdean

I attended my caucus:            ☐ Yes    ☐ No      I ran for Delegate at my caucus:    ☐ Yes    ☐ No

☐ DISABLED Disability/Handicapped, with respect to an individual, means a physical or mental impairment that substantially limits one or more of the major life activities of such individual, a record of such an impairment, or being regarded as such an impairment. I identify as a member of the disabled community: ☐ Yes                      ☐ No

I attended my caucus:    ☐ Yes                      ☐ No

Optional: I am requesting the following accommodation(s):

☐ LGBTQ+ Applicants are individuals that identify as part of the Lesbian, Gay, Bisexual, and Transgender Community.

I attended my caucus:    ☐ Yes                      ☐ No

An applicant must be a registered Democrat in Massachusetts. Party registration status can be checked here: [www.sec.state.ma.us/VoterRegistrationSearch/MyVoterRegStatus.aspx](http://www.sec.state.ma.us/VoterRegistrationSearch/MyVoterRegStatus.aspx). Completed applications must be received by 5:00 pm August 6, 2021. Mail applications to MassDems, 11 Beacon Street, Ste 410, Boston, MA 02108. Apply online at [www.massdems.org](http://www.massdems.org).



# Addendum

## A. Chair Script: Hybrid Caucus

### Volunteer Roles:

#### Required:

- **Chair:** The Chair of the Committee or their designee: runs the caucus, adjudicates disputes
- **Zoom Manager:** Operates the technical portion of the caucus, processes sign in, processes votes
- **Registration Volunteers:** helps look up participants status as registered Democrats and helps complete the sign in sheet

#### Optional:

- **Technical Volunteers:** supports the caucus by muting/unmuting participants, monitoring chat, chatting the names of Delegate/alternate candidates, helping participants with technical issues
- **Balloting Volunteers:** helps collect votes from participants

### PRE-CAUCUS (at least 30 minutes before the posted start time of your caucus):

#### Notes:

- A. When creating the Zoom link, the Chair/Zoom manager should ensure that registration is required for the Zoom meeting.
- B. Registration is open 30 minutes before the start of the caucus and closes 15 minutes after the posted start time of the caucus. All participants who join within this window **MUST** be signed in. You will begin admitting participants and registering them 30 minutes before the posted start time of your caucus. The Zoom Manager will enter each participant's name into the Google spreadsheet.
- C. If the Zoom Manager and the Chair are in the same room together: the Zoom Manager's microphone is turned **ON** and the camera is turned **ON**. The Chair's camera is **ON**, microphone is **MUTED** and the **computer's sound** is turned **OFF**. Failure to have Chair's audio and microphone turned off will result in audio-feedback. The Chair will have to speak loudly enough to be heard through the Zoom Manager's microphone. **Please test your set up in advance of the meeting.**
- D. Please make your Zoom manager "host" and the chair and all volunteers "co-hosts."
- E. Before admitting participants, the Zoom Manager should click on the "Security" settings at the bottom of the Zoom screen and ensure that participants may not share their screen, nor rename themselves.
- F. The Zoom Manager will enter each participant's name into the Google spreadsheet (based on this [template](#)). In-person attendees can sign in on a paper sheet (page 32 of this document--please print copies), which the Zoom Manager will then enter into the Google spreadsheet.
- G. The Zoom Manager makes sure that all attendees who will be dialing in via telephone have the Zoom Manager's phone number to report any problems or cast private votes.

Hello! My name is [Your Name], and I am the Chair of the [City/ Town/ Ward] Democratic Committee. Welcome to our caucus to select our Delegates and Alternates to the 2021 MassDems Platform Convention!

*[As Chair reads through introductory remarks, the Zoom Manager can copy the text below and paste it into the Zoom chat each time a new participant enters. If participants are dialed in via telephone, the Zoom Manager will have to ask these questions verbally.]*

**ZOOM CHAT:** Hello! I am the Zoom Manager for today's caucus. To verify your voter registration status as a Democrat, please chat me 1. your full legal name 2. the street address you are registered to vote at, including zip code, 3. Your email, 4. your date of birth, and 5. Your Self-reported gender (female, male, nonbinary)-- this will be important for determining how we elect Delegates/ Alternates.

Thank you all for coming to caucus under different circumstances than years past. Today's caucus is a normal caucus but we have some virtual participants, so a few things have changed, such as the balloting process and the forms we'll fill out at the end. Please be patient while we sign folks in today.

As we are meeting both in person and virtually, I'd like to review a few Zoom functions that our virtual participants will need to use during this meeting. Please follow along and look for these tools. Move your mouse to the bottom of the screen. A toolbar will appear. Please locate the mute/ unmute button. Please keep yourself muted for the entirety of the caucus unless you wish to speak. For those dialing in over the phone, please press \*6 to mute or unmute. Please find the chat and raise hand functions-- these are located in your "participants" tab. On the phone, press \*9 to raise your hand. You will be using the chat function to vote and the raise hand function to indicate that you wish to speak, so it's important you locate them now.

I would like to introduce and thank our volunteers who helped with registration, and who will be assisting during the balloting process. They are [Names]. As I read through the introductory remarks, our Zoom Manager will be marking our participants in the sign in sheet, confirming voter registrations, and making sure that everything filled out in paper gets marked online.

As I will be conducting the business of this caucus, we have a special volunteer role. [ZOOM MANAGER NAME] will be serving as the Zoom Manager for this event. They will manage sign in, manage the voting process and answer any questions you may have. For those voting over the phone, you will call or text your vote to the Zoom Manager. Please chat [ZOOM MANAGER NAME] directly with any questions. Please write down their phone number if you are on the phone, it is [ZOOM MANAGER PHONE NUMBER.] I repeat, please write down their phone number if you are on the phone, it is [ZOOM MANAGER PHONE NUMBER.]

**[Depending on how many folks join after you say this portion, you may consider repeating it as many times as necessary.]**

**ZOOM CHAT:** Hello! I am the Zoom Manager for today's caucus.

I will manage sign in, manage the voting process and answer any questions you may have. For those voting over the phone, you will call or text your vote to me at [YOUR PHONE NUMBER]. Please chat me directly with any questions.

To verify your voter registration status as a Democrat, please chat me 1. your full legal name 2. the street address you are registered to vote at, including zip code, 3. Your email, 4. your date of birth, and 5. Your Self-reported gender (female, male, nonbinary)-- this will be important for determining how we elect delegates/ alternates.

## II. Check In

- A. The Zoom Manager opens a [Google Sheet copied from this template](#) and begins signing people in virtual participants individually. They can enlist volunteers to help with this process. They will need to ascertain whether each individual is a registered Democrat in your town or City and Ward, and should determine whether they are voting/running for delegate/ alternate or joining as a guest.
- B. The Zoom Manager and their volunteers will verify each member's voter registration status either from a list of registered and pre-registered democrats from their town clerk that they requested in advance of the caucus or looking up attendees in Votebuilder. If you are not able to identify a voter as a registered or pre-registered Democrat, they may register here: <https://www.sec.state.ma.us/ovr/>
- C. The Zoom Manager and their volunteers can chat each participant individually for the information needed to confirm their registration:
  1. Full legal name
  2. Street address they are registered to vote at, including zip code
  3. Email (this will be helpful for the ballot process)
  4. Date of birth
  5. Self-reported gender (female, male, nonbinary)-- this will be important for determining how you elect delegates/ alternates.
    - a) Note: Not all users may be regularly checking new information in the Zoom chat, so the Zoom manager will likely have to follow up with some participants verbally.
- D. In-person attendees will fill out a paper sign-in sheet, which the Zoom Manager can then log in the Google Sheet. (please print copies of the sign in sheet, page 32 of this document)
- E. The Zoom manager and volunteers should discuss this process beforehand to determine a system that works best for them. You could add a column to indicate which volunteer is checking on the individuals information, make a rule that the volunteer who enters the name searches for the individual or another system.
- F. Phone participants will need to provide the information above verbally, or if your Zoom manager is adept at Zoom, they can move those who dialed in by phone to a breakout room to do so privately.
- G. The Zoom Manager should begin renaming Zoom participants to differentiate between eligible caucus voters and guests. Eligible voting participants can be renamed to have a 'D' next to their name and guests can be named to have a 'Guest' next to their name. For example, preregistered Democrat John Smith can be renamed "D-John Smith" while unenrolled voter Mary Jones can be renamed "Guest-Mary Jones."
- H. It is the Chair's responsibility that the virtual participants have an equal experience to that of the in-person participants. For example, this may include repeating motions or questions that in-person participants have raised so that both audiences have the same experience.
- I. Fifteen minutes after the posted caucus start time and once the Zoom Manager indicates to the chair that the sign in is completed, the chair should read the full sign-in list indicating who is a registered Democrat voting at the caucus and who is a guest, then request any additions or edits.

- J. After the 15 minute window, anyone who was not in line to be signed in during the 15 minute window is ineligible to vote in the caucus. Late arrivals are able to view the caucus as guests.

**At your posted caucus start time:**

Caucuses have only seven items on the agenda. They are as follows:

- (a) Information concerning the **2021 Massachusetts Democratic State Convention** with special emphasis upon the responsibilities of Delegates who will attend.
- (b) Discussion of “Affirmative Action and Outreach” as outlined in the Party Charter and Statewide Affirmative Action and Outreach Plan. The Chair shall also inform the participants that any candidate who is not elected as a delegate by the caucus and is a person with disabilities, minority or youth, is eligible to apply to the Democratic State Committee for selection as an add-on delegate as outlined in Section 31b.
- (c) Review of the **“Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention”** with an emphasis on the one ballot election procedure.
- (d) Explaining that certain Democratic Party officials are ex-officio delegates to the convention and that they each automatically attend the convention as full voting delegates. The Chairs of ward and town committees at the time of the convention are **not** included in the total allocation for their delegation and need not seek election as elected delegate and are equal to all other delegates.
- (e) Reading of the letter from Chair.
- (f) Highlight the Delegate Fee Waiver process.
- (g) The nomination and election of Delegates and Alternates.

Caucuses are governed by the method of selecting delegates and guided by the “Preliminary Call to Convention for the Massachusetts Democratic Party.” Both documents may be found online at [MassDems.org](http://MassDems.org) under the “2021 State Convention” tab.

The 2021 Convention is a “Platform Convention,” where delegates will determine the new platform for the Massachusetts Democratic Party. The Convention will take place physically on September 25th, though the event will be streamed online for those who wish to participate virtually. The Party will have a voting system that allows for equal participation regardless of whether you choose to attend in-person or virtually.

The Democratic Party of Massachusetts, to encourage full participation by all segments of the population, shall conduct affirmative action and outreach programs in behalf of target groups: Blacks, Hispanics, Asian-Americans, Native Americans and Cape Verdeans; and outreach programs on behalf of persons with disabilities, lesbians, gay men, bisexuals, transgender, workers, youth, low and moderate income people and senior citizens. Affirmative action procedures shall be followed in constituting all bodies of the Democratic party.

Any candidate who is not elected as a delegate and is a person with disabilities, is a minority, or is 35 years old or younger at the time of the convention, is eligible to apply to the Democratic State Committee as an add-on delegate.

The Add-On delegate positions are chosen by the State Committee through an application process. Please contact [convention@massdems.org](mailto:convention@massdems.org) if you have questions about the process or qualifications.

We do have applications for those positions today (please print multiple copies of page 45 of this document) if anyone is interested in completing one; note that preference is given to those individuals who participated in their local caucus. After we vote on delegates and alternates, we will post the link to the add on application in the Zoom chat. Applications for Add-on Delegates are due by **August 6, 2021**.

Anyone who completed the registration process today and has either verified their status as a registered or pre-registered Democrat in the community is eligible to take part in our caucus. We do welcome all guests who are here as observers today. *[Acknowledge elected officials or candidates for office present, and allow them to speak briefly, if you wish to do so].*

Today, we will be electing the following number of Delegates and Alternates to represent [City/ Town/ Ward.] [You can find the total number of delegates allocated to you in the [Delegate Allocation Table](#).]

**[If there are nonbinary candidates, or if you wish to conduct your election on one ballot]:**

We can elect [Number] delegates and [Number] alternates total. Delegates and alternates apportioned to us must be gender balanced (within one, in the case of odd numbers) with non-binary gender delegates and alternates not being counted in either the male or female category.

**[If all possible candidates are male or female:]**

As all candidates have identified as male or female, we will be electing:

[Number] Female Delegates

[Number] Male Delegates

[And one Delegate that may be of either gender, *if your delegate allocation is an odd number*]

After we elect our delegates, we will elect:

[Number] Female Alternates

[Number] Male Alternates

[And one Alternate that may be of either gender, *if your alternate allocation is an odd number*]

I will now explain the rules for running for Delegate and Alternate today.

These rules are set by the Democratic State Committee. Note that the full rules, called the “Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention,” are available for anyone to review. These rules are also online at the State Party’s website, [MassDems.org](http://MassDems.org).

To run for Delegate or Alternate, one:

- Must be a registered or pre-registered Democrat in [City/ Town/ Ward] by the time of the caucus.
- cannot have publicly supported or endorsed any candidate *opposing a nominee of the Democratic Party* in the current or previous partisan election. If one were to have done this in a Statewide or Presidential race, they cannot be elected Delegate or Alternate for 4 years; for all other offices, 2 years.

Certain Democratic Party leaders and elected officials are considered “Ex-Officio” Delegates, meaning they do not have to run at caucus to become Delegates, and meaning that they do not count against the community’s total allotted number of Delegates. These folks include the Chair at the time of the Convention, elected officials, state committee members and others as defined in the rules.

I will now read aloud a letter sent to local Chairs by the Chair of the Massachusetts Democratic Party, Gus Bickford. Our rules require that I read this letter aloud in its entirety:

[Read the Chair's letter aloud, page 3 of this document]

Finally, before we begin the election of Delegates and Alternates, I would like to briefly explain the Fee Waiver process for anyone elected today.

Delegates and Alternates both pay a \$75 fee to take part in the Convention, which helps the Party defray the substantial cost of the convention. This fee is due by August 13th; a \$25 late fee will apply after that. A Fee Waiver application is available for anyone who finds the cost of the fee to be prohibitive; Fee Waiver forms are available at MassDems.org and we will post the link in the chat.

**ZOOM CHAT:** Registration will be closing at [15 MINUTES AFTER YOUR POSTED CAUCUS START TIME.] If you have not yet done so, please chat me 1. your full legal name 2. the street address you are registered to vote at, including zip code, 3. Your email, 4. your date of birth, and 5. Your Self-reported gender (female, male, nonbinary)-- this will be important for determining how we elect delegates/ alternates.

If you do not send me this information before [15 MINUTES AFTER YOUR POSTED CAUCUS START TIME], you will not be eligible to vote or run for delegate or alternate today.

Fee Waiver form: <http://bit.ly/Fee-Waiver>

Add On Application: [bit.ly/Add-On-App](http://bit.ly/Add-On-App)

*[Ensure that at least 15 minutes have elapsed since the posted start time of your caucus; otherwise, stall!]*

*After 15 minutes, the Zoom Manager will give the list to the Chair and the Chair will read through the list of registered or pre-registered Democrats participating in the caucus and allow time for any corrections. Chairs should verbally confirm the names of participants, and whether they are candidates, voters, or guests.]*

Now we will move to the election of Delegates.

### III. Nominations

- A. The Chair takes nominations from the floor and the Zoom manager ensures that all who wish to be candidates for delegate have filled out the [consent to nominate form](#) (page 39-41 of this document). Participants who do not fill out a consent to nominate form cannot be elected as delegates or alternates.
- A. Chair takes nominations from the floor, speaking to both in-person participants and virtual participants.
- B. The Zoom manager will list all candidates for delegate in the Zoom Chat. In person, the Chair will write the names of all those nominated on a white board/piece of paper and read them aloud.

I will briefly describe the process we will follow:

[Determine whether you are electing delegates on one ballot for all genders, or male and female ballots]



- We will elect Delegates on [one ballot, selecting the highest vote-getters and alternating between male and female, with non-binary candidates counting towards the total allocation but not towards either gender **OR** on two ballots-- male and female, beginning with the male ballot. The number of male delegates allocated is half of the total of delegates allocated. If you have an odd number of delegates, you will elect the same number of male and female delegates, then conduct a third ballot for a delegate of either gender] . Delegates must be elected before Alternates. Folks who are not elected as Delegate may run for Alternate.
- Nominations are done verbally. As Chair, I will recognize participants to nominate other participants to run for Delegate (you CAN nominate yourselves, and I encourage you to do so to save time!)
- No group of participants may be nominated collectively as a “slate.” Everyone wishing to run must be individually nominated.
- The Zoom Manager will keep a list of all nominated persons and post that list in the Zoom chat as well as list them on a sheet of paper. We will read that list off for all those participating via telephone.
- Those nominated must consent to their nomination by signing the “Consent to Nomination” form before we move to the vote. The Zoom Manager will post the Consent to Nominate form in the chat now, and we have paper copies available as well.

**ZOOM CHAT:** Please fill out your Consent to Nominate form here, if you did not already complete during sign in: <http://bit.ly/ConsentToNominate>

- Once everyone wishing to nominate someone for delegate has been heard, we will close nominations.
- Once nominations have closed, nominees have the right to a two (2) minute speech. The provision allowing each candidate to make a two-minute speech may be waived or amended (i.e., shortened) by a vote of two-thirds (2/3) of those present and eligible to vote. Would anyone wish to propose an amendment to that rule at this time? *If so, allow for a brief discussion, followed by a voice vote. If the margin is clear, determine based on the voice vote whether it passed or failed.*
- In the event there are the same number, or fewer, nominees than there are available positions/ seats, the Chair may declare those nominated to have been elected without a ballot.
- In the event that there are more nominees than seats, once the nominees’ speeches have concluded , the caucus will proceed to an immediate ballot. Voting this year will be done electronically and does not have to be a secret ballot.
  - [If caucus is smaller, based on Chair’s discretion]: Participants will chat their votes to [ZOOM MANAGER NAME] and phone participants will call or text their vote to [ZOOM MANAGER PHONE NUMBER].
  - [If caucus is larger, based on Chair’s discretion]: Participants will be voting via Google Forms. Our Zoom Manager [NAME] will be posting those ballots in the Zoom chat shortly. Phone participants can call or text their vote to [ZOOM MANAGER PHONE NUMBER].
- **Election is by a plurality** of those present and voting; that is, those candidates receiving the greatest number of votes on the first ballot will be elected. A runoff will be conducted in the event of a tie vote.

Once we’ve finished electing folks in one category, we will move on to the next. Remember, Alternates must be elected after Delegates; anyone who runs for Delegate and does not win may run for Alternate.

**Are there any questions?**



*Note:* Names of nominees should be noted by the Zoom Manager and then posted in the chat, as well as written out for in-person attendees. All nominees MUST sign the "Consent to Nomination" form. The Zoom Manager will be unable to see who filled out the electronic form, so the Chair will have to confirm verbally that virtual nominees have filled out the form, and consented to being nominated as delegate and/or alternate.

*Do I hear a motion to open the floor for nominations? Is there a second?*

*[Chair will recognize nominations while the Zoom Manager keeps track of the nominees. Be sure to remind phone participants to press \*9 to unmute]*

**ZOOM CHAT:** Chat me or raise your hand if you'd like to nominate someone for delegate!

*[Once no more hands are up]: Do I hear a motion to close nominations? Is there a second?*

All those in favor of closing nominations, say aye. *[Hold for Ayes]* All those opposed, say nay *[Hold for Nays]*. The ayes have it, nominations are now closed. [Chair can begin reading off the names of folks who are nominated for delegate.]

**ZOOM CHAT:** Nominations are now closed! Our nominees for delegate are: [NAMES]. If you are a candidate and have not yet completed the consent to nominate, please do so now: <http://bit.ly/ConsentToNominate>

*Note:* Names of nominees should be noted by the Zoom Manager and then posted in the chat, as well as written out for in-person attendees. All nominees MUST sign the "Consent to Nomination" form. The Zoom Manager will be unable to see who filled out the electronic form, so the Chair will have to confirm verbally that virtual nominees have filled out the form, and consented to being nominated as delegate and/or alternate.

#### **IV. Speeches**

- A. If there are more candidates than seats: begin candidate speeches and recognize candidates to speak alphabetically.
- B. The Chair will call on candidates for delegate to speak. The Chair will keep track of time for each speech.
- C. Candidates must speak in front of the Zoom camera, loudly enough to be heard from the Zoom Manager's microphone, in order to address both the in-person and virtual audience.
- D. Each candidate will have two minutes (or otherwise agreed upon time) to speak. Remind them to unmute before speaking by pressing \*6 if they are on the phone or through their unmute button if they are participating on a computer.

Now that speeches have concluded, we will move to vote for our delegate(s).

- If there is no contested election because the same number, or fewer, nominees than there are available positions: As there are [the same number or fewer] candidates than available seats, no ballot is necessary. [The chair can either call for a voice vote electing the unopposed candidates or have the secretary cast one ballot for the unopposed candidates.]

## V. Voting for delegates

- A. Chairs have discretion to choose how voting will take place.
  1. Smaller caucuses may be best served by a voice vote or chatting their votes to the Zoom Manager. In-person voters can use paper ballots. The Zoom manager can keep track of voice votes or Zoom chat votes in the Sign In sheet used for attendance.
  2. Larger caucuses may prefer to use Google Forms--Chairs and Zoom Managers will need to have access to the form to view the results and prepare a method in advance that ensure all sharing is set up and accessible. In-person attendees can use paper ballots.
    - a) Google Form ballots will need to be edited in real time. **Zoom Managers will edit the form to include the names of the nominees for delegate, note how many delegates a voter can choose, and have to send out the shareable link so that voters can click on the ballot.**
- B. Voting members who are dialed into the Zoom meeting via telephone can either be moved to a breakout room where they can privately say their vote to the Zoom Manager, or hop off the Zoom meeting and call/text the Zoom Manager personally, or simply say their vote aloud.
- C. The Chair will announce when voting will conclude, and close the vote.
- D. The Zoom Manager will tally all votes that have been cast, and keep track of votes on the Google Sheet that they used for sign in for in-person ballots.
- A. The Zoom Manager will provide the results to the Chair, who can then announce them to the caucus.

- [If you conduct your election with two ballots, repeat this process for the female candidates, then a third time if you have an odd number of delegates to elect a delegate of any gender. Subsequently, repeat the entire process for alternates.]
  - [If there is no contested election because the same number, or fewer, nominees than there are available alternate positions]: As there are [the same number or fewer] candidates than available seats, no ballot is necessary. [The chair can either call for a voice vote electing the unopposed candidates or have the secretary cast one ballot for the unopposed candidates.]

## VI. Voting for Alternates

- A. Chair and Zoom Manager will repeat the voting process for alternate seat(s).
- B. Alternates shall be ranked according to the number of votes each receives. Tie votes shall be decided by lot; if no such election has occurred because the Alternate Candidates are uncontested, then such rank shall be determined by lot.
- C. If the alternates were uncontested and you have more than one alternate for each gender, alternates must be ranked.
- A. This is actually a simple process. For each alternate of the same sex cut a small piece of paper and on it write the alternate's name. Fold the pieces of paper in half. The chair will pick

the names in front of the zoom camera. The first name picked is the first alternate, and so forth.

Congratulations to all who were elected Delegates and Alternates! Remember, please be sure to fill out the Delegate and Alternate Certification form. You may complete a paper form or an electronic form at <https://bit.ly/DelAltExOCert2021> . These forms are necessary to receive your credentials.

c

For anyone who ran and was not elected Delegate or Alternate today, know that we would still love to have you at this year's Convention. If you qualify for one of the four Add-On categories, please consider applying to become an Add-On Delegate. You can also attend the Convention as a volunteer; a volunteer sign-up option can be found on the Party's website, MassDems.org.

**ZOOM CHAT:** If you wish to apply as an Add-On Delegate, please fill out your Add-On Delegate Form form here: [bit.ly/Add-On-App](http://bit.ly/Add-On-App)

For those who want to volunteer at the Convention, please fill out this form: <http://bit.ly/Convention-Vol>

## VII. After-caucus/Report your results

- A. The Chair will fill out the Chair certification form digitally at <http://bit.ly/chaircertification> or complete a paper version.
- B. Delegates, Alternates, and Ex-Officio members will fill out their certification forms digitally at <https://bit.ly/DelAltExOCert2021> or complete the paper version
- C. Chair will share Convention payment link and fee waiver forms for those who need it
- D. Chair shares any announcements: platform hearing dates, Blue '22, The Wednesday Wire, Dem Dispatch, The Store, Donation Link, etc.
- E. The Chair must still complete and mail hard copies of the following documents to 11 Beacon St., Suite 410, Boston, MA 02108 within 7 days of your caucus. Fill out these hard copies as you go along, or do it at the end. Materials must be mailed by August 6th **at the latest**:
  1. Caucus Sign-In Sheet
  2. Consent to Nominate Form(s) ( On your hard copy submissions of the consent to nominate forms, please write (virtual) next to each virtual candidate in lieu of their signature)
  3. Chair Certification Form
  4. Delegate/Alternate/Ex-Officio Certification Forms
  5. Add-On Delegate Forms (if applicable)
  6. Payment Forms (if applicable)
  7. Fee Waiver Forms (if applicable)

## B. Chair Script: Virtual Caucus

### Volunteer Roles:

#### Required:

Chair: The Chair of the Committee or their designee: runs the caucus, adjudicates disputes

Zoom Manager: Operates the technical portion of the caucus, processes sign in, processes votes

#### Optional:

Technical Volunteer: supports the caucus by muting/unmuting participants, monitoring chat, chatting the names of delegate/alternate candidates, helping participants with technical issues

Registration Volunteers: helps look up participants status as registered Democrats and helps complete the sign in sheet

Balloting Volunteers: helps collect votes from participants

### PRE-CAUCUS (at least 30 minutes before the posted start time of your caucus):

#### Notes:

1. When creating the Zoom link, the Chair/Zoom manager should ensure that registration is required for the Zoom meeting.
2. Registration is open 30 minutes before the start of the caucus and closes 15 minutes after the posted start time of the caucus. All participants who join within this window **MUST** be signed in. You will begin admitting participants and registering them 30 minutes before the posted start time of your caucus. The Zoom Manager will enter each participant's name into the Google spreadsheet.
3. If the Zoom Manager and the Chair are in the same room together: the Zoom Manager's microphone is turned **ON** and the camera is turned **ON**. The Chair's camera is **ON**, microphone is **MUTED** and the **computer's sound** is turned **OFF**. Failure to have Chair's audio and microphone turned off will result in audio-feedback. The Chair will have to speak loudly enough to be heard through the Zoom Manager's microphone. **Please test your set up in advance of the meeting.**
4. Please make your Zoom manager "host" and the chair and all volunteers "co-hosts."
5. Before admitting participants, the Zoom Manager should click on the "Security" settings at the bottom of the Zoom screen and ensure that participants may not share their screen, nor rename themselves.
6. Ensure that all attendees dialing in via telephone have the Zoom Manager's phone number to report any problems or cast private votes.

Hello! My name is [Your Name], and I am the Chairperson of the [City/ Town/ Ward] Democratic [City/ Town/ Ward] Committee. I'd like to welcome you to our virtual caucus to select the [City/ Town/ Ward] Delegates and Alternates to the 2021 Democratic State Platform Convention.

*[As Chair reads through introductory remarks, the Zoom Manager can copy the text on the next page and paste it into the Zoom chat]*

**ZOOM CHAT:** Hello! I am the Zoom Manager for today's caucus. To verify your voter registration status as a Democrat, please chat me 1. your full legal name 2. the street address you are registered to vote at, including zip code, 3. Your email, 4. your date of birth, and 5. Your Self-reported gender (female, male, nonbinary)-- this will be important for determining how we elect delegates/ alternates.

As we are meeting virtually, I'd like to review a few Zoom functions you will need to use during this meeting. Please follow along and look for these tools. Move your mouse to the bottom of the screen. A toolbar will appear. Please locate the mute/ unmute button. Please keep yourself muted for the entirety of the caucus unless you wish to speak. For those dialing in over the phone, please press \*6 to mute or unmute. Please find the chat and raise hand functions-- these are located in your "participants" tab. On the phone, press \*9 to raise your hand. You will be using the chat function to vote and the raise hand function to indicate that you wish to speak, so it's important you locate them now.

As I will be conducting the business of this caucus, we have a special volunteer role. [ZOOM MANAGER NAME] will be serving as the Zoom Manager for this event. They will manage sign in, manage the voting process and answer any questions you may have. For those voting over the phone, you will call or text your vote to the Zoom Manager. Please chat [ZOOM MANAGER NAME] directly with any questions. Please write down their phone number if you are on the phone, it is [ZOOM MANAGER PHONE NUMBER.] I repeat, please write down their phone number if you are on the phone, it is [ZOOM MANAGER PHONE NUMBER.]

**[Depending on how many folks join after you say this portion, you may consider repeating it as many times as necessary.]**

## I. Sign In

### Notes

1. The Zoom Manager opens a [Google Sheet](#) and lists people individually. They can enlist volunteers to help with this process. They will need to ascertain whether each individual is a registered Democrat in your town or City and Ward, and should determine whether they are voting/running for delegate/ alternate or joining as a guest.
2. The Zoom Manager and their volunteers will verify each member's voter registration status either from a list of registered and pre-registered democrats from their town clerk that they requested in advance of the caucus, or looking up attendees in Votebuilder. If you are not able to identify a voter as a registered or pre-registered Democrat, they may register here: <https://www.sec.state.ma.us/ovr/>
3. The Zoom Manager and their volunteers can chat each participant individually for the information needed to confirm their registration:
  - a. Full legal name
  - b. Street address they are registered to vote at, including zip code
  - c. Email (this will be helpful for the ballot process)
  - d. Date of birth
  - e. Self-reported gender (female, male, nonbinary)-- this will be important for determining how you elect delegates/ alternates.
    - i. Note: Not all users may be regularly checking new information in the Zoom chat, so the Zoom manager will likely have to follow up with some participants verbally.
4. The Zoom manager and volunteers should discuss this process beforehand to determine a system that works best for them. For example, you could add a column to indicate which volunteer is

checking on the individual's information, make a rule that the volunteer who enters the name searches for the individual, or another system.

5. Phone participants will need to provide the information above verbally, or if your Zoom manager is adept at Zoom, they can move those who dialed in by phone to a breakout room to do so privately.
6. The Zoom Manager should begin renaming Zoom participants to differentiate between eligible caucus voters and guests. Eligible voting participants can be renamed to have a 'D' next to their name and guests can be named to have a 'Guest' next to their name. For example, preregistered Democrat John Smith can be renamed "D-John Smith" while unenrolled voter Mary Jones can be renamed "Guest-Mary Jones."
7. Fifteen minutes after the posted caucus start time and once the Zoom Manager indicates to the chair that the sign in is completed, the chair should read the full sign-in list indicating who is a registered Democrat voting at the caucus and who is a guest, then request any additions or edits.
8. After the 15 minute window, anyone who was not in line to be signed in during the 15 minute window is ineligible to vote in the caucus. Late arrivals are able to view the caucus as guests.

### **At your posted caucus start time:**

Caucuses have only seven items on the agenda. They are as follows:

- (a) Information concerning the **2021 Massachusetts Democratic State Convention** with special emphasis upon the responsibilities of Delegates who will attend.
- (b) Discussion of "Affirmative Action and Outreach" as outlined in the Party Charter and Statewide Affirmative Action and Outreach Plan. The Chair shall also inform the participants that any candidate who is not elected as a delegate by the caucus and is a person with disabilities, minority or youth, is eligible to apply to the Democratic State Committee for selection as an add-on delegate as outlined in Section 31b.
- (c) Review of the **"Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention"** with an emphasis on the one ballot election procedure.
- (d) Explaining that certain Democratic Party officials are ex-officio delegates to the convention and that they each automatically attend the convention as full voting delegates. The Chairs of ward and town committees at the time of the convention are **not** included in the total allocation for their delegation and need not seek election as elected delegate and are equal to all other delegates. Ex-Officio delegates are not eligible for election at caucuses.
- (e) Reading of the letter from Chair.
- (f) Highlight the Delegate Fee Waiver process.
- (g) The nomination and election of Delegates and Alternates.

Caucuses are governed by the method of selecting delegates and guided by the "Preliminary Call to Convention for the Massachusetts Democratic Party." Both documents may be found online at [MassDems.org](https://MassDems.org) under the "2021 State Convention" tab.

The 2021 Convention is a "Platform Convention," where delegates will determine the new platform for the Massachusetts Democratic Party. The Convention will take place physically on September 25th, though the event will be streamed online for those who wish to participate virtually. The Party will have a voting system that allows for equal participation regardless of whether you choose to attend in-person or virtually.



The Democratic Party of Massachusetts, to encourage full participation by all segments of the population, shall conduct affirmative action and outreach programs in behalf of target groups: Blacks, Hispanics, Asian-Americans, Native Americans and Cape Verdeans; and outreach programs on behalf of persons with disabilities, lesbians, gay men, bisexuals, transgender, workers, youth, low and moderate income people and senior citizens. Affirmative action procedures shall be followed in constituting all bodies of the Democratic party.

Any candidate who is not elected as a delegate and is a person with disabilities, is a minority, or is 35 years old or younger at the time of the convention, is eligible to apply to the Democratic State Committee as an add-on delegate.

The Add-On delegate positions are chosen by the State Committee through an application process. Please contact [convention@massdems.org](mailto:convention@massdems.org) if you have questions about the process or qualifications.

Add-On applications are available at [massdems.org](http://massdems.org); note that preference is given to those individuals who participated in their local caucus. After we vote on delegates and alternates, we will post the link to the add on application in the Zoom chat. Applications for Add-on Delegates are due by **August 6, 2021**.

Anyone who completed the registration process today and has either verified their status as a registered or pre-registered Democrat in the community is eligible to take part in our caucus. We do welcome all guests who are here as observers today. *[Acknowledge elected officials or candidates for office present, and allow them to speak briefly, if you wish to do so].*

Today, we will be electing the following number of Delegates and Alternates to represent [City/ Town/ Ward.] [You can find the total number of delegates allocated to you in the [Delegate Allocation Table](#).]

**[If there are nonbinary candidates, or if you wish to conduct your election on one ballot]:**

We can elect [Number] delegates and [Number] alternates total. Delegates and alternates apportioned to us must be gender balanced (within one, in the case of odd numbers) with non-binary gender delegates and alternates not being counted in either the male or female category.

**[If all possible candidates are male or female:]**

As all candidates have identified as male or female, we will be electing:

[Number] Female Delegates

[Number] Male Delegates

[And one Delegate that may be of either gender, *if your delegate allocation is an odd number*]

After we elect our delegates, we will elect:

[Number] Female Alternates

[Number] Male Alternates

[And one Alternate that may be of either gender, *if your alternate allocation is an odd number*]

I will now explain the rules for running for Delegate and Alternate today.

These rules are set by the Democratic State Committee. Note that the full rules, called the “Method of Selecting Delegates to the 2021 Massachusetts Democratic State Convention,” are available for anyone to review. These rules are also online at the State Party’s website, [MassDems.org](http://MassDems.org).



To run for Delegate or Alternate, one:

- Must be a registered or pre-registered Democrat in [City/ Town/ Ward] by the time of the caucus.
- Cannot have publicly supported or endorsed any candidate *opposing a nominee of the Democratic Party* in the current or previous partisan election. If one were to have done this in a Statewide or Presidential race, they cannot be elected Delegate or Alternate for 4 years; for all other offices, 2 years.

Certain Democratic Party leaders and elected officials are considered “Ex-Officio” Delegates, meaning they may not run for Delegate at a caucus, and meaning that they do not count against the community’s total allotted number of Delegates. These folks include the Chair at the time of the Convention, elected officials, state committee members and others as defined in the rules.

I will now read aloud a letter sent to local Chairs by the Chair of the Massachusetts Democratic Party, Gus Bickford. Our rules require that I read this letter aloud in its entirety:

[Read the Chair’s letter aloud, page 3 of this document]

Finally, before we begin the election of Delegates and Alternates, I would like to briefly explain the Fee Waiver process for anyone elected today.

Delegates and Alternates both pay a \$75 fee to take part in the Convention, which helps the Party defray the substantial cost of the convention. This fee is due by August 13th; a \$25 late fee will apply after that. A Fee Waiver application is available for anyone who finds the cost of the fee to be prohibitive; Fee Waiver forms are available at MassDems.org and we will post the link in the chat.

**ZOOM CHAT:** Registration will be closing at [15 MINUTES AFTER YOUR POSTED CAUCUS START TIME.]

If you have not yet done so, please chat me 1. your full legal name 2. the street address you are registered to vote at, including zip code, 3. Your email, 4. your date of birth, and 5. Your Self-reported gender (female, male, nonbinary)-- this will be important for determining how we elect delegates/ alternates.

If you do not send me this information before [15 MINUTES AFTER YOUR POSTED CAUCUS START TIME], you will not be eligible to vote or run for delegate or alternate today.

Fee Waiver form: <http://bit.ly/Fee-Waiver>

Add On Application: [bit.ly/Add-On-App](http://bit.ly/Add-On-App)

**[Ensure that at least 15 minutes have elapsed since the posted start time of your caucus; otherwise, stall!]**

*After 15 minutes, the Zoom Manager will give the attendance list to the Chair and the Chair will read through the list of registered or pre-registered Democrats participating in the caucus and allow time for any corrections. Chairs should verbally confirm the names of participants and whether they are candidates, voters, or guests.*

Now we will move to the election of Delegates.

## II. Nominations

- A. The Chair takes nominations from the floor and the Zoom manager ensures that all who wish to be candidates for delegate have filled out the [consent to nominate form](#). Participants who do not fill out a consent to nominate form cannot be elected as delegates or alternates.
- B. The Zoom manager or another volunteer will list all candidates for delegate in the Zoom Chat and read it aloud as well.
- C. If you are comfortable with Zoom, also consider typing out the names on a document and screensharing the list.

I will briefly describe the process we will follow:

[Determine whether you are electing delegates on one ballot for all genders, or male and female ballots]

- We will elect Delegates on [one ballot, selecting the highest vote-getters and alternating between male and female, with non-binary candidates counting towards the total allocation but not towards either gender **OR** on two ballots-- male and female, beginning with the male ballot. The number of male delegates allocated is half of the total of delegates allocated. If you have an odd number of delegates, you will elect the same number of male and female delegates, then conduct a third ballot for a delegate of either gender] . Delegates must be elected before Alternates. Folks who are not elected as Delegate may run for Alternate.
- Nominations are done verbally. As Chair, I will recognize participants to nominate other participants to run for Delegate (you CAN nominate yourselves, and I encourage you to do so to save time!)
- No group of participants may be nominated collectively as a "slate." Everyone wishing to run must be individually nominated.
- The Zoom Manager will keep a list of all nominated persons and post that list in the Zoom chat. We will read that list off for all those participating via telephone.
- Those nominated must consent to their nomination by signing the "Consent to Nomination" form before we move to the vote. The Zoom Manager will post the Consent to Nominate form in the chat now.

**ZOOM CHAT:** Please fill out your Consent to Nominate form here, if you did not already complete during sign in: <http://bit.ly/ConsentToNominate>

- Once everyone wishing to nominate someone for delegate has been heard, we will close nominations.
- Once nominations have closed, nominees have the right to a two (2) minute speech. The provision allowing each candidate to make a two-minute speech may be waived or amended (i.e., shortened) by a vote of two-thirds (2/3) of those present and eligible to vote. *Would anyone wish to propose an amendment to that rule at this time? If so, allow for a brief discussion, followed by a voice vote. If the margin is clear, determine based on the voice vote whether it passed or failed.*
- In the event there are the same number, or fewer, nominees than there are available positions/ seats, the Chair can either call for a voice vote electing the unopposed candidates or have the secretary cast one ballot for the unopposed candidates.
- In the event that there are more nominees than seats, once the nominees' speeches have concluded (or been waived), the caucus will proceed to an immediate ballot for that delegate only.

Note: [Voting procedure is at the Chair's discretion. A Chair may move to simply have a voice vote, or to have members chat their votes to the Zoom Manager. Larger caucuses may use a Google Form ballot.]

- [Example] Voting this year will be done virtually and does not have to be a secret ballot. Participants will chat their votes to [ZOOM MANAGER NAME] and phone participants will call or text their vote to [ZOOM MANAGER PHONE NUMBER].
- **Election is by a plurality** of those present and voting; that is, those candidates receiving the greatest number of votes on the first ballot will be elected. A runoff will be conducted in the event of a tie vote.

Once we've finished electing folks in one category, we will move on to the next. Remember, Alternate categories must be elected after Delegates; anyone who runs for Delegate and does not win may run for Alternate.

### Are there any questions?

*Note:* Names of nominees should be noted by the Zoom Manager and then posted in the chat. All nominees **MUST** sign the "Consent to Nomination" form. Neither the Zoom Manager nor the Chair can see who has filled out the form, so the Chair will have to verbally confirm that nominees have filled out the form, and consented to being nominated as delegate and/or alternate.

*Do I hear a motion to open the floor for nominations? Is there a second?*

*[Chair will recognize nominations while the Zoom Manager keeps track of the nominees.]*

**ZOOM CHAT:** Chat me or raise your hand if you'd like to nominate someone for delegate!

*[Once no more hands are up]:* Do I hear a motion to close nominations? Is there a second?

All those in favor of closing nominations, say aye. *[Hold for Ayes]* All those opposed, say nay *[Hold for Nays]*. The ayes have it, nominations are now closed. [Chair can begin reading off the names of folks who are nominated for delegate.]

**ZOOM CHAT:** Nominations are now closed! Our nominees for delegate are: [NAMES]. If you are a candidate and have not yet completed the consent to nominate, please do so now: <http://bit.ly/ConsentToNominate>

### III. Speeches

- A. If there are more candidates than seats: begin candidate speeches and recognize candidates to speak alphabetically.
- B. The Chair will keep track of time for each speech and hold them to their time.
- C. Each candidate will have two minutes (or otherwise agreed upon time) to speak. Remind them to unmute before speaking by pressing \*6 if they are on the phone or through their unmute button if they are participating on a computer.

Now that speeches have concluded, we will move to vote for our delegate(s).

- If there is no contested election because the same number, or fewer, nominees than there are available delegate positions: As there are [the same number or fewer] candidates than available seats, no ballot is necessary. [The Chair can either call for a voice vote electing the unopposed candidates or have the secretary cast one ballot for the unopposed candidates.]

#### IV. Voting for Delegates

- A. Chairs have discretion to choose how voting will take place. Smaller caucuses may be best served by a voice vote or Zoom chatting their votes to the Zoom Manager. Larger caucuses may prefer to use Google Forms--Chairs and Zoom Managers will need to have access to the form to view the results and prepare a method in advance to ensure all sharing is set up and accessible.
  1. The Zoom manager can keep track of voice votes or Zoom chat votes in the Sign In sheet used for attendance.
  2. Google Form ballots will need to be edited in real time. **Zoom Managers will edit the form to include the names of the nominees for delegate, note how many delegates a voter can choose, and will have to send out the shareable link so that voters can click on the ballot.**
- B. Voting members who are dialed into the Zoom meeting via telephone can either be moved to a breakout room where they can privately say their vote to the Zoom Manager, hop off the Zoom meeting and call/text the Zoom Manager personally, or simply say their vote aloud.
- C. The Chair will announce when voting will conclude, and close the vote.
- D. The Zoom Manager will tally all votes that have been cast and provide the results to the Chair, who can then announce them to the caucus.

- [If you conduct your election with two ballots, repeat this process for the female candidates, then a third time if you have an odd number of delegates to elect a delegate of any gender. Subsequently, repeat the entire process for alternates.]
- If there is no contested election because the same number, or fewer, nominees than there are available alternate positions: As there are [the same number or fewer] candidates than available seats, no ballot is necessary. [The Chair can either call for a voice vote electing the unopposed candidates or have the secretary cast one ballot for the unopposed candidates.]

#### V. Voting for Alternates

- A. Chair and Zoom Manager will repeat the voting process for alternate seat(s).
- B. Alternates shall be ranked according to the number of votes each receives. Tie votes shall be decided by lot; if no such election has occurred because the Alternate Candidates are uncontested, then such rank shall be determined by lot.
- C. If the alternates were uncontested and you have more than one alternate for each gender, alternates must be ranked.
- D. This is actually a simple process. For each alternate of the same sex cut a small piece of paper and on it write the alternate's name. Fold the pieces of paper in half. The chair will pick the names in front of the zoom camera. The first name picked is the first alternate, and so forth.

Congratulations to all who were elected Delegates and Alternates! Before you sign off today, please be sure to fill out the Delegate and Alternate Certification form that our Zoom Manager will post in the chat. These forms are necessary to receive your credentials.

**ZOOM CHAT:** If you were elected, Please fill out your Delegate and Alternate Certification form here: <https://bit.ly/DelAltExOCert2021>

#### **VI. Add-On applicants**

- A. Share the Add-On Delegate Form. The Zoom Manager will post the link in the chat.

For anyone who ran and was not elected Delegate or Alternate today, know that we would still love to have you at this year's Convention. If you qualify for one of the four Add-On categories, please consider applying to become an Add-On Delegate. You can also attend the Convention as a volunteer; a volunteer sign-up option can be found on the Party's website, MassDems.org.

**ZOOM CHAT:** If you wish to apply as an Add-On Delegate, please fill out your Add-On Delegate Form form here: [bit.ly/Add-On-App](http://bit.ly/Add-On-App)

For those who want to volunteer at the Convention, please fill out this form: <http://bit.ly/Convention-Vol>

#### **VII. After-caucus/Report your results**

- A. The Chair will fill out the Chair certification form digitally at <http://bit.ly/chaircertification>
- B. Delegates, Alternates, and Ex-Officio members will fill out their certification forms digitally at <https://bit.ly/DelAltExOCert2021>. The Zoom Manager has already posted this in the Zoom chat, but the Chair should email this form to Delegates, Alternates, and Ex-Officio members after the meeting as well.
- C. Chair will share Convention payment link and fee waiver for those who need it
- D. Chair shares any announcements: platform hearing dates, BluePrint to '22, The Wednesday Wire, Dem Dispatch, Donation Link, etc.
- E. The Chair must still complete and mail hard copies of the following documents to 11 Beacon St., Suite 410, Boston, MA 02108 within 7 days of your caucus. Fill out these hard copies as you go along, or do it at the end. Materials must be mailed by August 6th **at the latest**:
  - 1. Caucus Sign-In Sheet
  - 2. Consent to Nominate Form(s) (On your hard copy submissions of the consent to nominate forms, please write (virtual) next to each virtual candidate in lieu of their signature)
  - 3. Chair Certification Form
  - 4. Delegate/Alternate/Ex-Officio Certification Forms
  - 5. Add-On Delegate Forms (if applicable)
  - 6. Payment Forms (if applicable)
  - 7. Fee Waiver Forms (if applicable)

## **C. Statewide Minority Media Outlets**

### **African American Newswire**

P. O. Box 80837  
Springfield, MA 01138-0837  
(413) 734-6444  
(413) 737-1458 (fax)

### **The Bay State Banner**

23 Drydock Avenue  
Boston, MA 02210  
(617) 261-4600  
(617) 261-2346 (fax)

### **Bay Windows**

631 Tremont Street  
Boston, MA 02118  
(617) 266-6670  
(617) 266-5973 (fax)

### **Boston Chinese News**

43 Gifford Lane  
Concord, MA 01742  
(617) 338-1170  
(978) 484-2033 (fax)

### **Boston Haitian Reporter**

150 Mount Vernon St, Ste 120  
Dorchester, MA 02122-3228  
(617) 436-1222  
(617) 825-5516 (fax)

### **El Mundo**

408 S. Huntington Street  
Boston, MA 02130-4836  
(617) 522-5060  
(617) 344-0453 (fax)

### **La Semana**

011 Massachusetts Avenue  
P.O. Box 850  
Boston, MA 02118-2608  
(617) 427-6212

(617) 427-6227 (fax)

### **Portuguese Times**

1501 Acushnet Avenue  
P.O. Box 6-1288  
New Bedford, MA 02746-1288  
(508) 997-3118  
(508) 990-1231 (fax)

### **Visao**

115 Main Street  
Brockton, MA 02404-3427  
(508) 559-8618  
(508) 587-6622 (fax)

### **MINORITY RADIO**

#### **Radio One** (WBOT 97.7 FM)

500 Victory Road  
Quincy, MA 02171  
(617) 472-9447  
(617) 472-9474 (fax)

#### **Mega Communications**

(WAMG 1150 AM/WLLH 1400 AM/WAMR 890 AM)  
The Schraft Center  
529 Main St. Suite 200  
Charlestown, MA 02109  
(617) 242-1800

#### **GOIS Broadcasting**

(WSPR 1270 AM/WACM 1490 AM)  
34 Sylvan St.  
West Springfield, MA 01089  
(413) 781-5200  
(413) 734-2240 (fax)

#### **Cutting Edge Broadcasting** (106.3 FM)

8 North King St.  
Northampton, MA 01060  
(413) 585-1112  
(413) 585-9138 (fax)

#### **RadioVas Do Emigrante**

(WHTB 1400 AM/WSAR 1480 AM)  
P.O. Box 9813  
Fall River, MA 02720  
(508) 678-9727  
(508) 673-0310 (fax)

#### **WBSM (1420 AM)**

22 Sconticut Neck Rd.  
Fairhaven, MA 02719  
(508) 996-0500  
(508) 999-1420 (fax)

#### **WSAR (1480 AM)**

P. O. Box 9813  
Fall River, MA 02720  
(508) 678-9727  
(508) 673-0310 (fax)

#### **WHMP (1240/1400/1600 AM)**

15 Hampton Ave. P.O. Box 268  
Northampton, MA 01061-0268  
(413) 586-7400  
(413) 585-0927 (fax)

#### **WHAI (98.3 AM)**

100 Main St.  
Northampton, MA 01060  
(413) 585-9555

#### **WRSI MA (93.9 FM)**

The River  
100 Main St.  
Northampton, MA 01060  
(413) 585-9555

## ***D. Affirmative Action Statement***

Massachusetts Democratic Party Charter Article 7, Section I:

The Democratic Party of Massachusetts, to encourage full participation by all segments of the population, shall conduct affirmative action and outreach programs in behalf of target groups: Blacks, Hispanics, Asian-Americans, Native Americans and Cape Verdeans; and outreach programs on behalf of persons with disabilities, lesbians, gay men, bisexuals, transgender, workers, youth, low and moderate income people and senior citizens. Affirmative action procedures shall be followed in constituting all bodies of the Democratic party.



## E. Delegate Allocation Table

Delegates and alternates apportioned to each ward and town must be gender balanced (within one, in the case of odd numbers) with non-binary delegates and alternates not being counted in either the male or female category. Chairs shall be ex-officio delegates who shall not be included in the total number of delegates allocated for the caucus.

Community	Ward	Dels	Alts
Abington		7	4
Acton		14	4
Acushnet		4	4
Adams		4	4
Agawam		11	4
Alford		1	1
Amesbury		8	4
Amherst		22	5
Andover		17	4
Aquinnah		1	1
Arlington		37	6
Ashburnham		2	1
Ashby		1	1
Ashfield		1	1
Ashland		9	4
Athol		3	3
Attleboro	01	3	3
Attleboro	02	3	3
Attleboro	03	3	3
Attleboro	04	3	3
Attleboro	05	3	3
Attleboro	06	3	3
Auburn		7	4
Avon		2	1
Ayer		3	3
Barnstable		20	4
Barre		2	1
Becket		1	1

Community	Ward	Dels	Alts
Bedford		8	4
Belchertown		7	4
Bellingham		6	4
Belmont		17	4
Berkley		2	1
Berlin		1	1
Bernardston		1	1
Beverly	01	3	3
Beverly	02	4	4
Beverly	03	4	4
Beverly	04	4	4
Beverly	05	3	3
Beverly	06	3	3
Billerica		17	4
Blackstone		3	3
Blandford		1	1
Bolton		3	3
Boston	01	20	4
Boston	02	13	4
Boston	03	25	5
Boston	04	17	4
Boston	05	24	5
Boston	06	16	4
Boston	07	14	4
Boston	08	11	4
Boston	09	15	4
Boston	10	17	4
Boston	11	16	4
Boston	12	16	4
Boston	13	15	4
Boston	14	26	5
Boston	15	13	4
Boston	16	17	4
Boston	17	23	5
Boston	18	53	8
Boston	19	26	5
Boston	20	30	5



Community	Ward	Dels	Alts
Boston	21	28	5
Boston	22	20	4
Bourne		8	4
Boxborough		3	3
Boxford		3	3
Boylston		2	1
Braintree		19	4
Brewster		6	4
Bridgewater		10	4
Brimfield		1	1
Brockton	01	8	4
Brockton	02	8	4
Brockton	03	8	4
Brockton	04	8	4
Brockton	05	8	4
Brockton	06	8	4
Brockton	07	8	4
Brookfield		1	1
Brookline		45	7
Buckland		1	1
Burlington		12	4
Cambridge	01	8	4
Cambridge	02	7	4
Cambridge	03	9	4
Cambridge	04	9	4
Cambridge	05	8	4
Cambridge	06	8	4
Cambridge	07	5	4
Cambridge	08	7	4
Cambridge	09	11	4
Cambridge	10	11	4
Cambridge	11	11	4
Canton		12	4
Carlisle		3	3
Carver		4	4
Charlemont		1	1
Charlton		4	4

Community	Ward	Dels	Alts
Chatham		3	3
Chelmsford		14	4
Chelsea	01	3	3
Chelsea	02	5	4
Chelsea	03	5	4
Chelsea	04	4	4
Cheshire		2	1
Chester		1	1
Chesterfield		1	1
Chicopee	01	3	3
Chicopee	02	3	3
Chicopee	03	3	3
Chicopee	04	3	3
Chicopee	05	3	3
Chicopee	06	3	3
Chicopee	07	3	3
Chicopee	08	3	3
Chicopee	09	3	3
Chilmark		1	1
Clarksburg		1	1
Clinton		6	4
Cohasset		4	4
Colrain		1	1
Concord		13	4
Conway		2	1
Cummington		1	1
Dalton		4	4
Danvers		11	4
Dartmouth		16	4
Dedham		15	4
Deerfield		3	3
Dennis		8	4
Dighton		3	3
Douglas		3	3
Dover		3	3
Dracut		12	4
Dudley		4	4

Community	Ward	Dels	Alts
Dunstable		1	1
Duxbury		7	4
East Bridgewater		5	4
East Brookfield		1	1
East Longmeadow		5	4
Eastham		3	3
Easthampton		11	4
Easton		10	4
Edgartown		3	3
Egremont		1	1
Erving		1	1
Essex		2	1
Everett	01	3	3
Everett	02	3	3
Everett	03	3	3
Everett	04	3	3
Everett	05	3	3
Everett	06	3	3
Fairhaven		8	4
Fall River	01	4	4
Fall River	02	4	4
Fall River	03	4	4
Fall River	04	4	4
Fall River	05	4	4
Fall River	06	4	4
Fall River	07	4	4
Fall River	08	5	4
Fall River	09	5	4
Falmouth		18	4
Fitchburg	01	3	3
Fitchburg	02	3	3
Fitchburg	03	3	3
Fitchburg	04	2	1
Fitchburg	05	3	3
Fitchburg	06	3	3

Community	Ward	Dels	Alts
Florida		1	1
Foxborough		8	4
Framingham		34	6
Franklin		14	4
Freetown		3	3
Gardner	01	1	1
Gardner	02	1	1
Gardner	03	1	1
Gardner	04	1	1
Gardner	05	2	1
Georgetown		3	3
Gill		1	1
Gloucester	01	3	3
Gloucester	02	3	3
Gloucester	03	3	3
Gloucester	04	4	4
Gloucester	05	3	3
Goshen		1	1
Gosnold		1	1
Grafton		8	4
Granby		3	3
Granville		1	1
Great Barrington		5	4
Greenfield		10	4
Groton		6	4
Groveland		3	3
Hadley		4	4
Halifax		3	3
Hamilton		4	4
Hampden		2	1
Hancock		1	1
Hanover		6	4
Hanson		4	4
Hardwick		1	1
Harvard		4	4
Harwich		7	4

Community	Ward	Dels	Alts
Hatfield		2	1
Haverhill	01	4	4
Haverhill	02	4	4
Haverhill	03	4	4
Haverhill	04	4	4
Haverhill	05	4	4
Haverhill	06	4	4
Haverhill	07	4	4
Hawley		1	1
Heath		1	1
Hingham		12	4
Hinsdale		1	1
Holbrook		5	4
Holden		8	4
Holland		1	1
Holliston		8	4
Holyoke	01	3	3
Holyoke	02	3	3
Holyoke	03	3	3
Holyoke	04	3	3
Holyoke	05	3	3
Holyoke	06	3	3
Holyoke	07	4	4
Hopedale		2	1
Hopkinton		8	4
Hubbardston		2	1
Hudson		9	4
Hull		6	4
Huntington		1	1
Ipswich		7	4
Kingston		5	4
Lakeville		4	4
Lancaster		3	3
Lanesborough		2	1
Lawrence	A	7	4
Lawrence	B	7	4
Lawrence	C	7	4

Community	Ward	Dels	Alts
Lawrence	D	7	4
Lawrence	E	7	4
Lawrence	F	7	4
Lee		3	3
Leicester		4	4
Lenox		4	4
Leominster	01	3	3
Leominster	02	3	3
Leominster	03	4	4
Leominster	04	3	3
Leominster	05	3	3
Leverett		2	1
Lexington		22	5
Leyden		1	1
Lincoln		5	4
Littleton		5	4
Longmeadow		9	4
Lowell	01	4	4
Lowell	02	5	4
Lowell	03	5	4
Lowell	04	4	4
Lowell	05	4	4
Lowell	06	5	4
Lowell	07	4	4
Lowell	08	4	4
Lowell	09	4	4
Lowell	10	4	4
Lowell	11	4	4
Ludlow		9	4
Lunenburg		4	4
Lynn	01	7	4
Lynn	02	6	4
Lynn	03	7	4
Lynn	04	6	4
Lynn	05	6	4
Lynn	06	6	4
Lynn	07	7	4

Community	Ward	Dels	Alts
Lynnfield		5	4
Malden	01	4	4
Malden	02	4	4
Malden	03	5	4
Malden	04	3	3
Malden	05	4	4
Malden	06	4	4
Malden	07	4	4
Malden	08	4	4
Manchester-by-the-sea		3	3
Mansfield		11	4
Marblehead		12	4
Marion		3	3
Marlborough	01	3	3
Marlborough	02	3	3
Marlborough	03	2	1
Marlborough	04	2	1
Marlborough	05	2	1
Marlborough	06	2	1
Marlborough	07	2	1
Marshfield		12	4
Mashpee		7	4
Mattapoisett		3	3
Maynard		6	4
Medfield		6	4
Medford	01	5	4
Medford	02	4	4
Medford	03	5	4
Medford	04	5	4
Medford	05	6	4
Medford	06	6	4
Medford	07	4	4
Medford	08	5	4
Medway		6	4
Melrose	01	3	3
Melrose	02	3	3

Community	Ward	Dels	Alts
Melrose	03	3	3
Melrose	04	2	1
Melrose	05	3	3
Melrose	06	2	1
Melrose	07	2	1
Mendon		2	1
Merrimac		3	3
Methuen		22	5
Middleborough		8	4
Middlefield		1	1
Middleton		3	3
Milford		12	4
Millbury		5	4
Millis		4	4
Millville		1	1
Milton		20	4
Monroe		1	1
Monson		3	3
Montague		5	4
Monterey		1	1
Montgomery		1	1
Mt. Washington		1	1
Nahant		2	1
Nantucket		7	4
Natick		21	5
Needham		20	4
New Ashford		1	1
New Bedford	01	9	4
New Bedford	02	7	4
New Bedford	03	9	4
New Bedford	04	8	4
New Bedford	05	9	4
New Bedford	06	7	4
New Braintree		1	1
New Marlborough		1	1

Community	Ward	Dels	Alts
New Salem		1	1
Newbury		4	4
Newburyport	01	2	1
Newburyport	02	2	1
Newburyport	03	2	1
Newburyport	04	2	1
Newburyport	05	2	1
Newburyport	06	2	1
Newton	01	8	4
Newton	02	9	4
Newton	03	10	4
Newton	04	8	4
Newton	05	9	4
Newton	06	8	4
Newton	07	7	4
Newton	08	8	4
Norfolk		4	4
North Adams	01	1	1
North Adams	02	1	1
North Adams	03	1	1
North Adams	04	1	1
North Adams	05	1	1
North Andover		13	4
North Attleboro		11	4
North Brookfield		2	1
North Reading		6	4
Northampton	01	4	4
Northampton	02	4	4
Northampton	03	4	4
Northampton	04	4	4
Northampton	05	4	4
Northampton	06	4	4
Northampton	07	4	4
Northborough		7	4
Northbridge		5	4
Northfield		2	1

Community	Ward	Dels	Alts
Norton		7	4
Norwell		5	4
Norwood		16	4
Oak Bluffs		4	4
Oakham		1	1
Orange		2	1
Orleans		4	4
Otis		1	1
Oxford		5	4
Palmer		5	4
Paxton		2	1
Peabody	01	4	4
Peabody	02	4	4
Peabody	03	4	4
Peabody	04	4	4
Peabody	05	4	4
Peabody	06	4	4
Pelham		1	1
Pembroke		7	4
Pepperell		4	4
Peru		1	1
Petersham		1	1
Phillipston		1	1
Pittsfield	01	3	3
Pittsfield	02	3	3
Pittsfield	03	4	4
Pittsfield	04	4	4
Pittsfield	05	4	4
Pittsfield	06	4	4
Pittsfield	07	4	4
Plainfield		1	1
Plainville		3	3
Plymouth		25	5
Plympton		1	1
Princeton		2	1
Provincetown		4	4
Quincy	01	8	4

Community	Ward	Dels	Alts
Quincy	02	8	4
Quincy	03	8	4
Quincy	04	8	4
Quincy	05	8	4
Quincy	06	8	4
Randolph		23	5
Raynham		5	4
Reading		14	4
Rehoboth		4	4
Revere	01	4	4
Revere	02	4	4
Revere	03	4	4
Revere	04	4	4
Revere	05	4	4
Revere	06	4	4
Richmond		1	1
Rochester		2	1
Rockland		7	4
Rockport		5	4
Rowe		1	1
Rowley		2	1
Royalston		1	1
Russell		1	1
Rutland		3	3
Salem	01	4	4
Salem	02	4	4
Salem	03	4	4
Salem	04	4	4
Salem	05	4	4
Salem	06	4	4
Salem	07	4	4
Salisbury		3	3
Sandisfield		1	1
Sandwich		9	4
Saugus		12	4
Savoy		1	1
Scituate		10	4

Community	Ward	Dels	Alts
Seekonk		6	4
Sharon		11	4
Sheffield		2	1
Shelburne		1	1
Sherborn		3	3
Shirley		2	1
Shrewsbury		16	4
Shutesbury		2	1
Somerset		9	4
Somerville	01	7	4
Somerville	02	10	4
Somerville	03	11	4
Somerville	04	9	4
Somerville	05	11	4
Somerville	06	11	4
Somerville	07	10	4
South Hadley		9	4
Southampton		3	3
Southborough		5	4
Southbridge		7	4
Southwick		3	3
Spencer		4	4
Springfield	01	12	4
Springfield	02	11	4
Springfield	03	11	4
Springfield	04	10	4
Springfield	05	12	4
Springfield	06	12	4
Springfield	07	11	4
Springfield	08	12	4
Sterling		3	3
Stockbridge		2	1
Stoneham		12	4
Stoughton		15	4
Stow		4	4
Sturbridge		4	4
Sudbury		11	4

Community	Ward	Dels	Alts
Sunderland		2	1
Sutton		3	3
Swampscott		9	4
Swansea		7	4
Taunton	01	3	3
Taunton	02	3	3
Taunton	03	3	3
Taunton	04	3	3
Taunton	05	3	3
Taunton	06	3	3
Taunton	07	3	3
Taunton	08	3	3
Templeton		2	1
Tewksbury		13	4
Tisbury		3	3
Tolland		1	1
Topsfield		3	3
Townsend		3	3
Truro		2	1
Tyngsborough		5	4
Tyringham		1	1
Upton		3	3
Uxbridge		5	4
Wakefield		13	4
Wales		1	1
Walpole		11	4
Waltham	01	4	4
Waltham	02	3	3
Waltham	03	3	3
Waltham	04	3	3
Waltham	05	4	4
Waltham	06	3	3
Waltham	07	3	3
Waltham	08	4	4
Waltham	09	3	3
Ware		3	3
Wareham		9	4

Community	Ward	Dels	Alts
Warren		2	1
Warwick		1	1
Washington		1	1
Watertown		25	5
Wayland		9	4
Webster		6	4
Wellesley		15	4
Wellfleet		3	3
Wendell		1	1
Wenham		2	1
West Boylston		3	3
West Bridgewater		3	3
West Brookfield		1	1
West Newbury		2	1
West Springfield		10	4
West Stockbridge		1	1
West Tisbury		3	3
Westborough		9	4
Westfield	01	3	3
Westfield	02	2	1
Westfield	03	2	1
Westfield	04	2	1
Westfield	05	2	1
Westfield	06	2	1
Westford		11	4
Westhampton		1	1
Westminster		3	3
Weston		6	4
Westport		8	4
Westwood		8	4
Weymouth		26	5
Whately		1	1
Whitman		6	4
Wilbraham		6	4

Community	Ward	Dels	Alts
Williamsburg		2	1
Williamstown		6	4
Wilmington		10	4
Winchendon		3	3
Winchester		12	4
Windsor		1	1
Winthrop		9	4
Woburn	01	3	3
Woburn	02	3	3
Woburn	03	3	3
Woburn	04	3	3
Woburn	05	3	3
Woburn	06	3	3
Woburn	07	3	3
Worcester	01	9	4
Worcester	02	10	4
Worcester	03	8	4
Worcester	04	8	4
Worcester	05	9	4
Worcester	06	8	4
Worcester	07	9	4
Worcester	08	8	4
Worcester	09	10	4
Worcester	10	8	4
Worthington		1	1
Wrentham		4	4
Yarmouth		12	4