

# Table of Contents

|                                                          |           |
|----------------------------------------------------------|-----------|
| <b>Table of Contents</b>                                 | <b>1</b>  |
| <b>Chapter 1: Role of Local Party and Chair</b>          | <b>4</b>  |
| Electing Democrats & Expanding the Democratic Electorate | 4         |
| Purpose of the Local Committee                           | 5         |
| Relations Between the Local Party and DPVA               | 6         |
| <b>Guideline for Committee Leadership</b>                | <b>6</b>  |
| Being an Effective Party Leader                          | 6         |
| <b>Chapter 2: Party Structure and Overview</b>           | <b>8</b>  |
| DNC                                                      | 8         |
| DPVA                                                     | 8         |
| Party Plan                                               | 8         |
| Central Committee                                        | 9         |
| Steering Committee                                       | 9         |
| State Party Officers                                     | 9         |
| Congressional District Committees                        | 11        |
| Other Party Organizations                                | 11        |
| Internal Party Organizations                             | 12        |
| State Party Staff                                        | 12        |
| <b>Chapter 3: Responsibilities</b>                       | <b>12</b> |
| Code of Virginia                                         | 13        |
| Requirements of the Party Plan                           | 13        |
| Local Committee Bylaws                                   | 13        |
| Seeking Legal Advice                                     | 14        |
| <b>Chapter 4: Organizing Your Committee</b>              | <b>15</b> |
| Bylaws                                                   | 15        |
| Dues                                                     | 16        |
| Executive/Steering Committee                             | 16        |
| Building a Better Committee                              | 17        |
| Running an Effective Meeting                             | 18        |
| Meeting Preparation                                      | 18        |
| Moving the Agenda:                                       | 19        |
| <b>Chapter 5: Setting Priorities</b>                     | <b>20</b> |
| Evaluating Your Role and Situation                       | 20        |
| Setting Priorities For Your Agenda                       | 21        |
| Developing Your Plan                                     | 21        |
| <b>Chapter 6: Nominating Process</b>                     | <b>23</b> |
| Primary                                                  | 23        |

|                                                          |           |
|----------------------------------------------------------|-----------|
| <b>Caucus</b>                                            | <b>23</b> |
| <b>Assembled v. Unassembled Caucus</b>                   | <b>23</b> |
| <b>The Call to Caucus</b>                                | <b>24</b> |
| <b>Notice Requirements</b>                               | <b>25</b> |
| <b>Caucus Participation</b>                              | <b>25</b> |
| <b>General Caucus Considerations</b>                     | <b>26</b> |
| <b>Caucuses in Statewide Convention Years</b>            | <b>26</b> |
| <b>Convention</b>                                        | <b>26</b> |
| <b>Getting on the Ballot</b>                             | <b>27</b> |
| <b>Collecting Signatures</b>                             | <b>28</b> |
| <b>Nominating Committees</b>                             | <b>28</b> |
| <b>Reorganizing</b>                                      | <b>29</b> |
| <b>Chapter 7: Preparing for Elections</b>                | <b>31</b> |
| <b>Candidate Recruitment and Development</b>             | <b>31</b> |
| <b>Candidate Recruitment</b>                             | <b>32</b> |
| <b>Candidate And Campaign Staff Training</b>             | <b>33</b> |
| <b>Schedule of Office of Election Years</b>              | <b>34</b> |
| <b>Voter File &amp; I.D. Development and Maintenance</b> | <b>34</b> |
| <b>VAN</b>                                               | <b>34</b> |
| <b>Voter File Development and Maintenance</b>            | <b>35</b> |
| <b>Outreach</b>                                          | <b>35</b> |
| <b>Traditional Democrats</b>                             | <b>36</b> |
| <b>“Natural” Constituencies</b>                          | <b>37</b> |
| <b>Values in Action: Community Visibility</b>            | <b>38</b> |
| <b>Voter Expansion</b>                                   | <b>38</b> |
| <b>Voter Protection Team</b>                             | <b>39</b> |
| <b>Voter Registration</b>                                | <b>39</b> |
| <b>Restoration of Rights</b>                             | <b>39</b> |
| <b>Voter Education</b>                                   | <b>39</b> |
| <b>Legislation</b>                                       | <b>39</b> |
| <b>Relationships with Democratic Elected Officials</b>   | <b>39</b> |
| <b>Chapter 8: Elections</b>                              | <b>41</b> |
| <b>Endorsement In Nonpartisan Races</b>                  | <b>41</b> |
| <b>Precinct Organization</b>                             | <b>41</b> |
| <b>Precinct Captain</b>                                  | <b>42</b> |
| <b>Training Local Party Leaders and Activists</b>        | <b>43</b> |
| <b>Voter Contact</b>                                     | <b>44</b> |
| <b>Door-to-door Canvassing</b>                           | <b>44</b> |

|                                                             |    |
|-------------------------------------------------------------|----|
| Telephone Program                                           | 45 |
| Absentee Voting Program                                     | 46 |
| Voter Protection                                            | 46 |
| Chapter 9: The Money                                        | 48 |
| Budgeting the Necessary Funds                               | 48 |
| Fundraising                                                 | 50 |
| Campaign Finance Reporting/Compliance                       | 52 |
| Chapter 10: Communication                                   | 56 |
| Developing Good Press Relations                             | 56 |
| The Rules                                                   | 57 |
| Letters To The Editor: Speak Out                            | 58 |
| Postcards                                                   | 58 |
| Communications And Message Delivery                         | 58 |
| “Earned Media”                                              | 59 |
| Rapid Response Networks                                     | 60 |
| Digital Outreach For Committees: Internet Use By Committees | 61 |
| Appendix                                                    | 66 |
| Additional Resources For Chapter 3:                         | 66 |
| Additional Resources For Chapter 4:                         | 66 |
| Additional Resources For Chapter 5:                         | 66 |
| Additional Resources For Chapter 6:                         | 66 |
| Additional Resources For Chapter 8:                         | 66 |
| Additional Resources For Chapter 9:                         | 66 |
| Additional Resources For Chapter 10:                        | 67 |

## Chapter 1: Role of Local Party and Chair

Today's local party serves as a bridge between grassroots activists and our candidates and officeholders, providing the support needed to win elections. The role of the party and its leaders now includes coordinating campaign efforts with the Democratic Party of Virginia, not just during campaign season, but also through year-round party building, organizational activities, and direct candidate services.

### The role of the city/county committee includes:

- **Local Organization:** (Precinct/Local/Legislative District Organizing)
- **Candidate Recruitment:** (State, Legislative District, & Local ballots)
- **Running:** (Caucuses and Primaries to nominate candidates)
- **Fundraising**
- **Party building and outreach**
- **Development and maintenance of Voter files and targeting data**
- **Complying with election law:** (Voter Rights & Campaign Finance Laws)

The primary goals of the City/County Democratic Committees are to **elect Democratic candidates** to public office and to **expand the Democratic electorate**. Virginia has elections every year, which means our Local Committees and Chairs need to be looking ahead to the next election while ensuring current cycle candidates are elected.

## Electing Democrats & Expanding the Democratic Electorate

There are 5 components to electing Democrats and expanding the Democratic electorate: **Candidate Recruitment, Nomination Processes, Volunteers, Voter File Data, and Voter Protection.**

**Candidate Recruitment:** To elect Democrats, we need well-prepared candidates. This means continually recruiting and training candidates is crucial. Many legislators and state leaders start out on School Boards, City Councils, Boards of Supervisors, or as active community members. DPVA and partnering organizations host candidate trainings throughout the year, which are helpful for preparing candidates and identifying potential leaders within your community.

**Nomination Processes:** In special elections, it is the responsibility of the local committee to **determine and organize, if necessary, nomination processes** for party-nominated candidates. *This is a legal requirement of local parties and the local party chair.* The most common nomination process is holding a caucus. In regularly scheduled elections, per a new law in effect Jan 1, 2024, all partisan candidates for

office must be nominated by a primary. The committee is responsible for receiving and validating the signatures needed for your local candidates to qualify for the primary ballot.

**Volunteers:** One of the most valuable things a committee can provide a campaign is grassroots volunteers. These volunteers, often members of the local committee, have close relationships and connections with voters. They're the Democrats who knock on doors, call voters, and assist with voter registration. They're the backbone of local committees and the Party.

**Voter File Data:** Local committees can utilize the VoteBuilder (also known as VAN) to keep track of information. VAN contains the entire voter file for your locality. This database helps in reaching out to voters, recruiting volunteers, identifying potential members, and contacting potential donors. However, the effectiveness of VAN depends on the quality of its data, so the more information collected, the better the data quality will be.

**Voter Protection:** Local committees often engage in voter protection efforts on election day by placing volunteers inside and outside polling places to monitor voting. They also send volunteers to canvass and attend provisional ballot meetings afterward. Developing a voter protection program is crucial for local elections. It's also important to build a good relationship with your local registrar's office to ensure everything runs smoothly and voter issues are addressed effectively.

## Purpose of the Local Committee

One of the main tasks for a committee is developing outreach programs, which can be challenging for a local committee chair. While current members are active, the goal is to show others that the Democratic Party cares about their issues and values their involvement. Building grassroots support requires ongoing effort, time, and the ability to connect with community needs, as well as the stamina to engage new participants.

There are three types of activities that have been helpful with community outreach: **voter registration, voter education, and community building/social events.**

**Voter Registration:** Local committees often conduct voter registration drives at events, popular locations, high schools, and door-to-door in areas with lots of people.

**Voter Education:** Boosting voter turnout can be achieved through voter education. By educating voters about voting requirements and providing resources to answer their

questions, committees can ensure voters are well-prepared. Voter education also serves as a way to introduce voters to Democratic candidates.

**Community Building Efforts:** The local committee strengthens community bonds by interacting with residents to understand their needs. They organize social events such as charity drives, happy hours, and community gatherings to bring people together and foster a sense of belonging. These activities promote social interaction, involvement, and a friendly environment that encourages community members to join the local committee.

## **Relations Between the Local Party and DPVA**

With elections happening every year, your committee is always busy, but you're not alone. DPVA and your Congressional District Chairs are here to support you with staff and resources. Feel free to reach out whenever you have questions or need assistance.

There are expectations and responsibilities on both sides. The DPVA will have expectations of local chairs, and you can also expect certain things from us. Here's what we expect to ensure we're on the same page from the start:

### **What Local Chairs can expect from DPVA:**

- Training materials and resources
- Assistance with technological resources like social media and VAN
- Election support through a voter hotline and voter information website
- Providing your local candidates with resources as they run for office

### **What DPVA expects from Local Committees:**

- Respond to DPVA emails— this can be either you as the chair or a liaison within your committee
- Send us updated lists of party officers and committee membership
- Communicate any changes in contact people to DPVA
- Return requested forms, data, and dues on time
- Inform us about upcoming events
- Work with DPVA on candidate recruitment

## **Guideline for Committee Leadership**

### **Being an Effective Party Leader**

While there's no one-size-fits-all formula for leading a committee effectively, certain traits can boost your leadership abilities and help your local committee thrive.

Here are two guidelines to help you stay focused during your tenure as chair:

**Recognize Your Obligations:**

- To perform your role effectively, it's important to handle your duties diligently and pay attention to the small details that keep everything running smoothly. The executive board of your committee is a valuable support system, so feel comfortable delegating tasks and ensuring everything is double-checked. Adhere to the guidelines outlined in your committee Bylaws, DPVA Party Plan, and the regulations set by the State Board of Elections and Federal Election Commission. Stay alert so disagreements about responsibilities don't hold you back

**Overcoming Challenges:**

- You have a lot on your plate—expectations and responsibilities. While setting a high bar is great, you can't do everything. With many challenges and expectations, focus on setting priorities and achievable goals for leading the committee.

## Chapter 2: Party Structure and Overview

The Democratic Party of the United States is governed by the Democratic National Committee, which oversees each State Democratic Party. The Democratic Party of Virginia operates under the [Party Plan](#), which establishes local, Steering, and Central Committees, as well as state party officers and Congressional District Committees. The staff of the Democratic Party of Virginia supports all these committees and organizations.

### DNC

The Democratic National Committee (DNC) is the governing body of the National Democratic Party. Each state elects members to the DNC; Virginia elects four members (two men and two women) at the State Convention every Presidential year for four-year terms. Additionally, the DNC Chair appoints 75 members, with those from Virginia included in the Democratic Party of Virginia (DPVA).

The DNC meets twice a year to oversee the nomination of national candidates, organize National Conventions, set rules, and ensure states follow these rules. The DNC operates under its National Charter and Rules, with a dedicated staff that supports both the DNC and state party organizations. For more information, visit [www.democrats.org](http://www.democrats.org).

### DPVA

The Democratic Party of Virginia is one of fifty-six state parties (including territories). Every resident of the Commonwealth of Virginia who supports the Party's principles is considered a member of the Democratic Party of Virginia.

### Party Plan

Each state party has its own bylaws, and in Virginia, we call ours "The Party Plan." It is the governing document of the Democratic Party of Virginia, outlining the party's structure, roles, nominating procedures, and rules for caucuses and conventions. It also covers procedures like proxy voting, binding delegates, quorum requirements, notice rules, etc. [Refer to the Party Plan often.](#)

You can view a chart with the Democratic Party Organization Structure by [clicking here](#).



## Central Committee

The governing body of the DPVA is the State Central Committee. Its members are detailed in the Party Plan and include state officers, DNC representatives, 20 CD representatives from each of the 11 CD Committees, and certain elected officials (Democratic members of Congress, the Governor, Lieutenant Governor, Attorney General, President Pro Tempore of the State Senate, Speaker of the House of Delegates, and the chairs of the Democratic caucuses of the Senate and House).

The Central Committee has different caucuses and groups, like the Virginia Young Democrats (VAYD), Virginia Democratic Women's Caucus, and Democratic Latino Organization of Virginia (DLOV). These are just a few examples. You can check out the full list later in this section.

The Central Committee meets at least four times a year, usually quarterly, and oversees the nomination of statewide candidates, determining the method of nomination. It also issues calls to State Conventions, sets rules, amends the Party Plan, and ensures district and local committees comply with the rules and the Party Plan.

## Steering Committee

The [Steering Committee](#) is like the "Executive Committee/Board" of the Democratic Party of Virginia. It manages the state party between Central Committee meetings, handling all party matters during that time. Generally, the State Steering Committee and Central Committee work together like a local committee's Executive Board and the committee itself.

The officers of the Central Committee also serve as officers of the Steering Committee. All [Steering Committee members](#) are also members of the Central Committee and their respective Congressional District Committees. Additionally, all 11 Congressional District Committee Chairs are part of the Steering Committee.

## State Party Officers

[\*\*State Party Officers\*\*](#) are officers of both the Central Committee and Steering Committee.

The [\*\*Chair of the Democratic Party\*\*](#), also known as the Chair of the Central Committee, has the authority to appoint and remove staff members like the Sergeant-at-arms, Parliamentarian, deputies, assistants, committees, counsel, and other needed

personnel to help manage the operations of the Democratic Party of Virginia. These appointments are subject to approval by the Steering Committee. The State Chair supervises the Vice Chairs and assigns them various duties and projects.

The **Vice-Chair for Organization (First Vice-Chair)** is responsible for strengthening County and City Democratic Committees by boosting membership, improving organization, providing training, and coordinating with Congressional Districts on statewide campaigns. They lead meetings in the State Chair's absence and may act as State Chair temporarily if the position is vacant pending a new election by the Central Committee.

The **Vice-Chair for Rules (Second Vice-Chair)** prepares the Party Plan and other rules, drafts amendments to these documents, delegates selection plans, and calls to convention. They also advise the State Chair on how to implement these rules, and they serve as the chair of the standing committee on resolutions or appoint its chair in collaboration with the State Chair.

The **Vice-Chair for Technology and Communications** helps Congressional District, County, and City Committees implement technologies for voter identification and mobilization, maintaining records, and communications within the Party and the public.

The **Vice-Chair for Finance** raises funds to meet the party's annual budget needs. They collaborate with the treasurer and finance director to implement a fundraising plan. Additionally, they support Congressional District, County, and City Committees with their fundraising efforts.

The **Vice-Chair for Outreach** serves as chair of the standing outreach committee, as provided in section 4.21 of the Party Plan, and collaborates with Congressional District, County, and City Committees to create outreach plans. They connect with different Democratic constituencies and coordinate with statewide organizations that support the Party. The Vice-Chair for Outreach also manages the Party's voter registration efforts.

The **Secretary of the Central Committee** keeps and makes available to members the minutes of the Central Committee and Steering Committee meetings and formally certifies actions and resolutions of the Central Committee.

The **Treasurer of the Central Committee** manages and safeguards all committee funds, maintaining a detailed record of contributions, receipts, and expenditures. At each Central Committee meeting, the treasurer presents a financial update and provides an audited report annually. They collaborate with the Vice-Chair for Finance

to create the annual budget and conduct quarterly budget reviews. The treasurer also signs necessary financial reports for the Federal Election Commission and State Board of Elections.

## **Local Democratic Committees**

There are 133 localities in Virginia, each with its own local committee, which forms the backbone of the Party. Some chairs also serve on their CD Committee as one of the 20 elected members or as one of the 3 local committee chairs selected by the CD committee. However, serving as a local chair does not automatically make you a member of the Central Committee.

According to the Party Plan, committees must reorganize by caucus or convention between December 1st of odd-numbered years and January 15th of the following year. During this time, committee members are elected. Ideally, each precinct should have at least one voting member from that precinct. Officer elections occur at the first meeting after reorganization. Local committees usually meet monthly.

## **Other Party Organizations**

### **Virginia Association of Democratic Chairs (VADC)**

The Virginia Association of Democratic Chairs (VADC) is made up of all the local committee chairs. It was created to help chairs to exchange information with each other. They form working groups based on region and size and work with DPVA staff to offer training and support. The VADC typically reorganizes every two years after local committee reorganization (the start of every even-numbered year).

### **Virginia Young Democrats**

Young Democrats (VAYD or YD) clubs are a fantastic way to get young folks involved in politics. There are chapters at nearly every major college, university, many community colleges, and high schools across the state. There are also active groups for young professionals. These clubs bring together young people ages 13 to 35 to participate in campaigns and help build the Democratic Party. For more information, visit <http://www.vayd.org>.

Be sure to include Young Dems in your campaigns and committee activities—they're full of energy and eager to help. Involve them in planning and strategy meetings, and appreciate their contributions without taking advantage of their enthusiasm. Local

committee chairs should see YDs as crucial for our current and future success. Train them well and welcome their input!

## **Internal Party Organizations**

The DPVA acknowledges the importance of encouraging growth and active participation from key groups in party activities. Across the Commonwealth, Democrats are networking based on shared interests and goals. As our caucuses grow, each caucus chair also serves on the Steering Committee.

**Below are the current Caucuses of the DPVA:**

- [\*\*\*Virginia Democratic Women's Caucus\*\*\*](#)
- [\*\*\*Democratic Black Caucus of Virginia \(DBCV\)\*\*\*](#)
- [\*\*\*DPVA disAbility Caucus\*\*\*](#)
- [\*\*\*Rural Caucus\*\*\*](#)
- [\*\*\*Virginia Democratic Small Business Caucus\*\*\*](#)
- [\*\*\*LGBT Democrats of Virginia\*\*\*](#)
- [\*\*\*Democratic Asian Americans of Virginia \(DAAV\)\*\*\*](#)
- [\*\*\*Democrats Latino Organization of Virginia \(DLOV\)\*\*\*](#)
- [\*\*\*Veterans and Military Family Members Caucus\*\*\*](#)
- Labor Caucus

## **State Party Staff**

The DPVA staff are employees of the Central Committee. The Executive Director oversees the daily operations of the DPVA and reports to the State Party Chair. A list of current staff and their contact info can be found at [\*\*\*Staff - Democratic Party of Virginia\*\*\*](#). The DPVA office is open Monday to Friday from 9:00 am to 6:00 pm.

## Chapter 3: Responsibilities

As a local committee chair, you have important roles and responsibilities, including writing and adopting a call to caucus, fulfilling election-related legal requirements, filing campaign finance reports, and interpreting bylaws.

Understanding primary committee obligations, Virginia and federal law, and the DPVA Party Plan is crucial. It is good to have a general knowledge of the rules and laws. Ignoring these duties can harm your leadership, lead to negative press, or result in legal issues.

This chapter outlines resources that can help you comprehend these rules and laws, but it's not a complete list or legal advice. Your obligations are primarily governed by three main sources: the Code of Virginia, the Party Plan, and your Committee Bylaws.

### Code of Virginia

When you were elected chair of your local committee, you assumed critical legal responsibilities. The majority of the roles and responsibilities for your position are underlined under [Title 24.2 Elections](#) of the Code of Virginia.

In addition, the chair is responsible for ensuring all financial reports are accurate and submitted on time. Chapter 9 in this document provides detailed information on reporting requirements. This requirement is critical - if you have any questions about your need to report after reading this document, contact the DPVA.

#### Relevant Sections of the Code of Virginia:

- [Sections of the Code of Virginia](#)
- [Section of the Code of Virginia](#)

### Requirements of the Party Plan

The Party Plan is the DPVA's bylaws. It includes requirements like helping with voter registration, paying committee dues, finding people for nominating committees, reorganizing committees, holding meetings, and providing notices. More details and responsibilities are in the [Party Plan](#).

### **Most relevant sections of the Party Plan:**

- Article 7 - Democratic Constitutional Officer and General ASSEMBLY DISTRICT Nominating Committees
- Article 8 - Democratic County and City Committees
- Article 10 - General Provision

## **Local Committee Bylaws**

Every local committee should have its own bylaws. Read your bylaws to understand your obligations. If you can't find them, check with DPVA or create and adopt new ones. The State Party Plan requires you to submit your committee's bylaws to the State Headquarters ([political@vademocrats.org](mailto:political@vademocrats.org)) within 90 days of your election as Chair.

## **Seeking Legal Advice**

Your committee should have its own legal counsel familiar with federal and state election and campaign finance laws.

### **Party legal counsel should be trained by state counsel and understand:**

- Federal and state campaign finance laws related to the committee's activities.
- Virginia laws on candidate eligibility and ballot access.
- Federal and Virginia laws on voter eligibility and registration.
- Virginia laws on challenged ballots and contested elections.
- Virginia election laws, including early voting and mail ballots.

Notify DPVA of any legal issues as they arise. Contact the DPVA's Voter Protection Director or Executive Director first, who will consult DPVA's Legal Counsel if needed.

## Chapter 4: Organizing Your Committee

As the local party chair, it's your responsibility to organize your committee to meet legal and party plan requirements while focusing on electing Democrats and expanding the electorate. Many obligations can be delegated to other committee officers and or members, but the chair remains ultimately responsible for carrying out the Party's obligations. This chapter covers tools and best practices to help you organize your committee to accomplish all of these goals.

### Bylaws

Each city or county has bylaws or rules that govern the committee's operations. As chair, you need to understand these bylaws. If you can't find them and the State Party doesn't have them, creating and adopting bylaws should be a priority. The State Party Plan requires you to submit your committee's bylaws to State Headquarters within 90 days of your election as chair.

#### According to Article 10.2 of the State Party Plan:

- ***"All Democratic committees shall adopt bylaws, rules or regulations deemed necessary for the proper operation of such committee. Such bylaws, rules or regulations when not in conflict with law or this Plan, shall be considered valid and binding. Such bylaws, rules or regulations shall be mailed to state headquarters within fourteen (14) days of approval by any Democratic committee and shall be kept on permanent file and made available for public viewing."***

Once adopted, ensure a copy of your bylaws is promptly sent to state headquarters. If you're unsure whether the State Party has received a copy, contact the political team at [political@vademocrats.org](mailto:political@vademocrats.org).

#### Each committee's bylaws are unique. Here are some items likely included in yours:

- How frequently does the full Committee meet?
- What Officer positions exist and what are their roles and responsibilities?
- Is there flexibility to create additional Officers?
- What Standing Committees exist, what functions do they fulfill, and what is their membership?
- What guidance exists regarding Ad-Hoc or Special Committees?
- What can the Executive Committee do? What can only the full Committee do?

Review your bylaws regularly and consider modifying them as needed. Ensure they comply with the State Party Plan.

## Dues

According to Article 8.14 of the State Party Plan, “Every county and city committee shall be responsible for paying to the treasurer of the Central Committee in a timely manner the annual dues provided for under Section 4.15 under this Plan.”

Your dues support the cost of operating the party office, quarterly meetings, and services so that they may create and provide services to the committees and party. The amount is calculated based on the number of delegates each county and city received at the latest State Democratic Convention.

## Executive/Steering Committee

Each local committee elects officers who form the executive or steering committee.

[Article 10.2 of the State Party Plan](#) states that:

- *“Following the election of its members as provided herein, each new county or city committee shall elect a chair, secretary, treasurer, and such other officers as it deems necessary no later than January 15th.”*

**Local Party Chairs:** They are crucial for uniting the local party. They call meetings, ensure smooth operations, and supervise officers, volunteers, and staff. Their duties include managing candidate nominations, recruiting and training candidates, and acting as the party spokesperson. The Chair also serves as a liaison between the state party and the local committee.

**Treasurer:** tracks contributions and expenses for the local party, providing regular financial reports to the committee. They also file campaign finance reports as required by state and federal law.

**Secretary:** records meeting minutes for the local party committee and manages committee correspondence. They also maintain organizational records, except for financial documents held by the treasurer. The secretary communicates important events to the state party for publication on their website.

The State Party Plan gives local committees the flexibility to add more officers. Your bylaws may specify what these positions are or provide the chair flexibility to create them.



### **Other common Officer positions include:**

- Executive Vice Chair – assists the Chair
- Finance – oversees committee fundraising efforts
- Outreach – develops and implements constituent outreach programs
- Communications – maintains the website, social media, and email system
- Voter Expansion – directs voter registration drives, restoration of rights programs, and voter education

Your Executive Committee should meet periodically, and a minimum frequency may be set out in your bylaws.

## **Building a Better Committee**

There are three major components to building a strong local committee: **Direction, Organization and Communication.**

### **Direction:**

- The Chair doesn't manage everything alone. Effective organizations develop a strategic plan with budgeting, fundraising, communications, candidate recruitment, and campaign strategies. These tasks are delegated to officers and committee members. Clear delegation of tasks and a clear end goal keeps the committee focused and minimizes distractions from lower-priority activities.

### **Organization:**

- The Chair should clearly outline the duties of officers and committees to ensure clarity and success. An organized structure ensures that everyone understands their responsibilities, reduces confusion and stress within the committee, and promotes effective communication, making the committee better equipped to handle changes and challenges. When recruiting new members, consider local demographics and actively encourage volunteerism with enthusiasm.

### **Communication:**

- Good communication among committee members is vital for a strong and active committee. Here are ways to maintain communication:
  - Schedule regular meetings for better attendance planning.
  - Set up clear and accessible communication channels, such as email, messaging apps, or collaboration platforms for quick communication.
  - Maintain a committee website with news, events, and links to local elected Democrats.

- Be active on social media platforms like Facebook and Twitter, posting updates regularly.
- Provide regular updates through newsletters, meetings, or announcements to keep everyone informed.

## Running an Effective Meeting

Meetings should have an agenda and a clear purpose, helping you implement your strategic plan and ensuring nothing is overlooked. Including a speaker or dedicating part of the meeting to specific issues can attract attendees. Sending out the agenda beforehand can help attendees know what to expect and prepare accordingly.

A good meeting is timely, follows the agenda, and is productive. People want to participate and be treated fairly. The three essentials for a successful meeting are **preparation, sticking to the agenda, and following parliamentary procedures.**

If the agenda is followed and everyone can participate, you often don't need to use Robert's Rules of Order. However, a cheat sheet for Robert's Rules is available below.

[\*Sample Meeting Agenda\*](#)

[\*Sample Meeting Minutes\*](#)

[\*Robert's Rules Summary\*](#)

[\*Robert's Rules for Dummies Cheat Sheet\*](#)

## Meeting Preparation

### Plan the Meeting:

- Know the meeting's purpose. Schedule a time and location that is accessible. Make sure the physical set-up of the meeting space is compatible with the goals of the meeting. Send timely notices and an agenda that reflects this purpose. If a motion or resolution is to be presented, ensure you have someone to move and second it.

### Plan for Participation:

- Prepare handouts and visuals. Consider including a training component in all meetings. Save time on the agenda for local leaders to share their activities, problems, and successes. This gives folks a chance to speak at the end of the meeting and actively participate.

## **Moving the Agenda:**

### **No one has the floor unless recognized:**

Use time limits to keep the meeting on track. The Chair should allow only one speaker at a time, and no one can speak unless the Chair recognizes them. If a speaker goes on too long, the Chair should move on to someone else to avoid side conversations and distractions.

### **Set the tempo:**

Most attendees don't come to meetings to nitpick the agenda. If there's a legitimate controversy, the Chair should address it promptly and move forward. Ensure that all viewpoints are heard without allowing the discussion to derail. Promptly move on from topics that are resolved or no longer productive to maintain momentum. Setting the pace shows respect for everyone's time and ensures discussions stay focused.

### **Be fair; handle disruptions effectively:**

In all of the discussions about moving the agenda, don't lose sight of treating people fairly. The Democratic Party values diversity and inclusivity, ensuring everyone's voice is heard. Encourage participation from those who typically remain silent and maintain consistent treatment of all members.

## Chapter 5: Setting Priorities

### Before developing a strategy and action plan, you need to:

1. Understand the expectations key Democrats have for the Party.
2. Assess the current status of Party operations.
3. Determine the available political and financial resources.
4. Build consensus for your program.

Consider the questions on the following pages, think honestly about them, and write down your answers. This will help you establish your priorities and plan.

### The process involves three steps:

1. Evaluate your role and situation within the Party.
2. Set your long-term agenda.
3. Write a plan to achieve your goals.

## Evaluating Your Role and Situation

The first step in creating a plan of action is to evaluate your role and situation. Understand your responsibilities and the expectations of key political players, including your executive board and others essential to your committee's success. This evaluation will help you see the "big picture" and define your role as Chair, as well as the roles of other officers and members

### Who Are You Responsible To?

- Were you elected due to your relationships with party leaders to set an agenda for the party?
- Were you chosen for your campaign experience to improve candidate support and services?
- Were you picked to use your contacts to raise funds and provide financial stability?
- Were you selected for your public relations skills to enhance the party's image and serve as its spokesperson?
- Or was it a combination of these factors?

### What Are the Conditions You'll Work Under?

- Is your committee in debt? Can you fund new plans for your committee?
- Will you improve existing programs or do you have to make major changes and create a new agenda?

### What Will Your Role Be?

- Will you be a hands-on leader and manage daily details or delegate them?
- Will you be a visible spokesperson or work behind the scenes?
- How much time can you commit to your duties?
- What are your personal strengths and limitations?

Your situation is unique. Each party organization and individual is different. As a city/county committee chair, you can define your job and those of committee officers, as long as you follow local bylaws, the DPVA Party Plan, and election laws. The opportunities and challenges are significant, so plan your agenda carefully to ensure success.

### Setting Priorities For Your Agenda

Many of your agenda items may already be set by existing policies and political circumstances, so you don't have to start from scratch. Always be ready to re-evaluate. Limit yourself—don't try to do everything alone. Focus on three or four activities you can do well. Only take on more projects when you have the necessary funding and people to support them.

These questions can help in planning. Involve key supporters, party officers, and elected leaders in developing your agenda, or create a special planning committee. Your plan is more likely to succeed if key players are involved from the beginning and feel invested in the agenda.

- **Why are we here?** (To elect Democrats!) Identify issues or goals.
- **What actions should we take?** Identify potential solutions or objectives.
- **What do we need to get it done?** Identify people and financial resources.
- **How do we accomplish the tasks?** Identify specific tasks and activities.
- **When do we need to complete this?** Develop a schedule or timeline.
- **What could hinder us?** Identify potential obstacles.
- **Did we succeed?** Allow for an honest evaluation.

### Developing Your Plan

Good programs don't happen by chance. Even if you don't need to submit a formal plan, writing it down helps you reference and solidify your ideas. A plan is only real when it's documented; otherwise, it remains just an idea.

Each agenda item should follow these basic components. When all your smaller plans come together, they form your complete party agenda. At this stage, it's important to

consider the bigger picture, set priorities, assign responsibilities, coordinate schedules, and allocate resources.

1. Description of Problem
2. Possible Solutions
3. Goals and Objectives
4. Description of Activities
5. Available Resources
6. Anticipated Obstacles
7. A Timeline
8. Evaluation

## Chapter 6: Nominating Process

One important role of a chair is to manage the nomination process in your locality. These processes may vary year to year regarding their specific goals, but their basic procedures generally remain unchanged. For statewide and federal candidates, the method of nomination is determined by either the State Party for statewide offices or the Congressional District Committee for U.S. House candidates. However, if a caucus or convention process is chosen, additional responsibilities may apply.

The Democratic Party of Virginia **uses a State-Run Primary for nominating Democratic candidates** in all partisan elections. If no candidate files for the nomination by the filing deadline, the committee can use a party-run process and choose any method of nomination they prefer. We recommend a firehouse primary.

### Primary

Primaries in Virginia are governed by state law and the Party Plan. The State Board of Elections sets the date for primaries and works with local election officials to run them. If a primary is chosen as the method to nominate a candidate, it is required for the local party chair to inform both the State Board of Elections and the State Party. You do this through SBE form ([\*Party Notice of Nomination Method\*](#)). The DPVA typically does this form for you, but feel free to reach out if you want to confirm. This process is the most common way to nominate Democratic candidates for general elections. The Chair receives the forms from the persons who file to be candidates in the primary and then submits the list of candidates who qualify for the primary to the SBE and/or registrar.

### Caucus

The Party Plan governs how caucuses are conducted. Caucuses can be held alone or in conjunction with a convention and usually occur in two situations: committee reorganization and selecting delegates for conventions, like during presidential years for State and CD Conventions.

### Assembled v. Unassembled Caucus

**There are two types of caucuses:**

- **Assembled:** (also called a mass meeting)
- **Unassembled:** (also known as a firehouse primary)

Each type has its benefits, and the choice usually depends on local preference and tradition.

**The Assembled Caucus is highly structured.** There is a definite start time, and everyone meets in the same room. Once the caucus begins, the doors are locked, and no one else can enter. If someone leaves, they may not be allowed back in. However, anyone standing in line when the caucus starts can still participate. Attached below are some sample rules for an Assembled Caucus that you may use as a guide.

[W Sample Call to Assembled Caucus for Reorganization.docx](#)

[W Sample Temporary Assembled Caucus Rules for Reorganization.docx](#)

[W Sample Assembled Caucus Tick Tock.docx](#)

**The Unassembled Caucus is more flexible.** Voting happens over a set period, and people can come in, vote, and leave, like a polling place on Election Day. This type of caucus typically lasts for a few hours. Sample rules for an Unassembled Caucus are attached below.

[W SampleCalltoUnassembledCaucus.docx.docx](#)

[W Sample Temporary Unassembled Caucus Rules for Reorg.docx](#)

[W Sample Unassembled Caucus Tick Tock.docx](#)

## The Call to Caucus

**After deciding to hold a caucus, the first task of the committee is to draft a document called the "Call to Caucus."According to the Party Plan, this document must:**

- Specify the time, place, and purpose of the caucus.
- May limit the caucus to the stated purpose.
- Make all necessary arrangements for the caucus.
- State the conditions for canceling the caucus, if applicable.
- Ensure the caucus location is ADA-accessible.
- Ensure the caucus is conducted according to the Party Plan.



### Each "Call to Caucus" should include:

- Whether it will be an assembled (mass meeting) or unassembled (firehouse primary) caucus
- Pre-filing requirements and any fees
- How votes will be allocated, if applicable
- Notice requirements
- A description of any caucus committees
- A statement on affirmative action
- How the call will be distributed
- Candidate filing fees and deadlines

The committee drafts, adopts, and distributes the Call to Caucus and must also adopt rules for conducting the caucus.

## Notice Requirements

Every Democratic caucus or convention must be announced at least seven (7) days before it happens. If a caucus or convention process is used and the initial notice includes the time and place of the convention, a second notice isn't needed.

Committees must use their usual communication channels to spread this notice as widely as possible within their area. This includes posting the notification on their committee website or the DPVA website and sending a press release to all relevant newspapers.

## Caucus Participation

To participate in a caucus, individuals must sign a [Caucus Declaration](#) form stating that they:

1. Are a Democrat.
2. Are a registered voter in the area where the caucus is held.
3. Support Democratic Party principles.
4. Will not support any candidate opposing a Democratic nominee in the next election.

This form must be signed by everyone participating in the caucus. For better tracking, consider adding participants to VAN with a special activist code.

## General Caucus Considerations

When planning your caucus, consider the following:

- **Observers' Area:** Create a separate space for those who want to watch but not vote.
- **Press Area:** If you have press coverage, ensure they have a designated area with necessary equipment and safety measures. Keep it separate from the caucus area.
- **Campaign Materials:** Decide if campaign materials are allowed and, if not, restrict them to the registration area. Include this in your rules.
- **Timekeeping:** Use a visible, tamper-proof clock to keep track of time.
- **Accessibility:** Ensure the caucus location is accessible to people with disabilities, following ADA guidelines.

***No fee can be charged to attend and vote at a caucus.***

## Caucuses in Statewide Convention Years

In years with Statewide Conventions, local caucuses across Virginia elect about 2,000 State Delegates and 500 Alternates. These delegates attend Congressional District and State Conventions. In presidential years, they also elect National Convention Delegates at these conventions.

State Delegates are assigned to cities and counties based on Democratic votes and sometimes population. The exact numbers are detailed in the DPVA Call to Convention.

Caucuses might be canceled if the number of people filing to be delegates or alternates is less than or equal to the number of positions available. The Call to Caucus should state that it may be canceled under these conditions. If this happens, the chair of the nominating committee decides whether to cancel or hold the caucus, notifies the public, and informs those who filed.

## Convention

The convention process involves two steps: caucuses and the convention. Delegates and alternates are elected at local caucuses and then attend the convention, which may be used for nominating candidates for state and federal offices. Caucuses must occur before the convention, though they can be on the same day. The Party Plan and specific committees govern the conventions. Virginia requires certain forms and timing

for the nomination process, and the chair must certify any nominated candidate to the State Board of Elections.

**As per Section 14.2 of the Party Plan, any committee issuing a Call to Convention must:**

- Specify the time, place, and purpose of the convention or caucus.
- May restrict the convention or caucus to the purpose stated in the call notice.
- Make all convention and caucus arrangements.
- State the conditions for cancellation of the caucus or convention, if desired.
- Ensure that all conventions or caucuses are held in an ADA-accessible location.
- Ensure that the convention or caucus is held in accordance with the Party Plan.

Once a Convention is chosen, the committee's first task is drafting the Call to Convention. The committee drafts, adopts, and distributes the call to Convention. This process is more complicated than a caucus in that you must first decide how you will allocate delegates, how you will elect delegates and alternates, and credentialing delegates at the Convention. The DPVA staff provides detailed documents when needed.

## **Getting on the Ballot**

The Virginia Department of Elections has two web pages that explain how to become a candidate and necessary materials for getting on the ballot. You can check them out here: [\*\*\*ELECT's Becoming A Candidate\*\*\*](#) and the [\*\*\*Candidate Bulletin\*\*\*](#).

**All candidates must:**

- Be eligible to vote for and hold the office they seek
- Have lived in Virginia for at least one year before the election

**Local Offices Forms:**

- [\*\*\*Certificate of Candidate Qualification\*\*\*](#)
- [\*\*\*Declaration of Candidacy\*\*\*](#)

**General Assembly Forms:**

- [\*\*\*Certificate of Candidate Qualification\*\*\*](#)
- [\*\*\*Declaration of Candidacy\*\*\*](#)

**Federal Offices Forms:**

- [\*\*\*Certificate of Candidate Qualification\*\*\*](#)
- [\*\*\*Declaration of Candidacy\*\*\*](#)

## Collecting Signatures

To get on the ballot, an individual must collect signatures using the [\*Petition of Qualified Voters\*](#) from ELECT. It is important to check signatures using VAN to ensure that all collected signatures are valid and meet the legal requirements for getting on the ballot. This helps prevent issues such as duplicate or invalid signatures, which could disqualify a candidate from being eligible.

To collect signatures for a candidate, get the official forms from your local election authority or print them yourself. Gather a team of volunteers and target busy areas like events and community centers. Approach registered voters, explain your candidate's platform, and make sure to collect valid signatures from eligible voters. You can see how many signatures a person will need to collect using this [link](#).

## Nominating Committees

**Nominating committees in the Virginia Democrats have these key purposes:**

1. **Recruiting and Vetting Candidates:** Find and assess potential candidates to ensure they meet qualifications and align with party values and goals.
2. **Organizing Nomination Processes:** They organize and oversee the nomination process, which can include primaries, caucuses, or conventions, to select the party's candidates for general elections.
3. **Supporting Candidates:** Provide strategic advice, fundraising help, and coordinating with party resources for campaigns.
4. **Ensuring Compliance:** Make sure nomination procedures follow party rules and state laws. They check signatures, certify documents, and handle required paperwork.

There is a nominating committee for each House of Delegates and Senate district. Each nominating committee must elect a chair, secretary, and other needed officers. They also consist of one member from every locality within the district. They meet between January 1 and January 15 of each election year. By February 1, they must inform State Party headquarters of the members' and officers' contact details. Any two members can call a meeting, and if there are fewer than three members, any member can call a meeting.

Each member's vote on the nominating committee is weighted according to the votes the top Democratic candidate received in the last general election in their county or city relative to the total votes that candidate received in the entire district.

The nominating committee chair must receive the required candidacy notices, petitions, and fee receipts on time and ensure all Democratic candidates know where to file. If only one candidate files by the deadline, they will be declared the nominee and no primary will be held. If no candidates file by the deadline, the nominating committee chair will decide whether to hold a caucus, announce the decision publicly, and notify the candidates.

## Reorganizing

Every two years, new City and County committees are elected or reorganized between December 1st of odd-numbered years and January 15th of even-numbered years, as required by the Party Plan. This is a chance to expand your committee and include new members. Reorganization is simply a caucus held to elect members to the Democratic committee.

### A. Rules

**Rules that apply to caucuses in general also apply to the reorganization caucus. In addition, there are some specific rules that apply:**

- **Timing:** Caucuses for committee elections must be held on a Saturday or a weekday evening as per bylaws. Any waiver must be granted by the State Party Chair or Steering Committee.
- **Officer Elections:** New City and County committees must elect a chair, secretary, and other necessary officers soon after the caucus. This can occur at the reorganization meeting.
- **Filing Deadline:** If filing for committee membership is required, the deadline cannot be more than 10 days before the election and must meet the same notice requirements as the caucus.
- **Participant Certification:** Each participant must certify that they are a Democrat, a registered voter in the jurisdiction, believe in Democratic principles, and do not intend to support any candidate opposed to a Democratic nominee in the next election.
- **Temporary Rules:** *Temporary rules, prepared by the chair of the local committee, are required for the election.* The chair must prepare temporary rules available *at least one week before* the caucus. For an assembled caucus, the caucus will adopt the rules. For an unassembled caucus, the current committee must adopt the rules before the election date.

## B. Requirements

After your committee has reorganized, the chair is required to **submit a copy of the committee bylaws to the State Party** (section 8.7 of the Party Plan). In addition, **the secretary should submit the names, addresses, e-mail addresses, and phone numbers (home, office, and mobile, if applicable) of the officers and members of the committee** (section 8.6 of the Party Plan). It is extremely important for you to **provide the State Party with your bylaws** and to make sure that a **complete list (including addresses, emails, and phone numbers) of your new committee has been forwarded.**

## C. Suggestions for Expanding Participation

**This year, Democrats can expand our ranks, recruit new volunteers, and diversify our local committees. Here are some ideas for recruiting for your committee:**

- **Voter File:** Use your committee's VAN account to identify strong Democrats (SD) from the Registered Voter List.
- **Public Notices:** Post notices in coffee shops, libraries, churches, union halls, community centers, laundromats, and use social media like Facebook and Twitter.
- **Union and Association Outreach:** Contact members of local unions and teachers' associations.
- **"Each One, Reach One":** Encourage each current committee member to bring a new person to the reorganization.
- **Combine with Celebrations:** Host events like a volunteer appreciation potluck, victory celebration for local candidates, or a social hour/meet and greet after reorganization.

## Chapter 7: Preparing for Elections

Committee planning is about constantly preparing for upcoming elections and organizing efforts to support Democratic candidates. This is our fundamental purpose as a Party. Remember our primary goal: **electing Democrats to office and expanding the Democratic electorate.**

How do you plan ahead? Follow the [election calendar](#) provided by the State Board of Elections. Every year, there is an election in Virginia (sometimes multiple), making us one of two states in the country with a non-stop round of election cycles (New Jersey is the other one).

Coordinated Campaigns are familiar to almost every Democrat. They vary across elections and counties. Generally, the term describes the basic ticket-wide general election campaign to identify, motivate, and turn out the Democratic vote. The idea of a "year-round Coordinated Campaign" emphasizes ongoing coordination among Democrats, involving committee officers, officeholders, donors, and key constituency groups, beyond just election periods.

To succeed, Every Democrat must feel invested in the program and be actively involved. The committee Chair must work closely with Virginia Democratic Party leaders, local officials, community groups, and donors throughout the year. This ensures ongoing planning, funding, and execution of party-building efforts, rather than starting a Coordinated Campaign only 90 days before the general election. Delaying collaboration until after the primary election doesn't build a strong committee or win elections.

**Year-round coordination is crucial for various programs such as:**

- Candidate recruitment and development, supported by the House/Senate Caucuses or DPVA staff
- Voter file development and maintenance, assisted by DPVA
- Outreach programs to build local Democratic-friendly coalitions
- Voter expansion efforts including registration, rights restoration, and voter education
- Fundraising and event planning
- Communication strategies for both internal and external messaging

### Candidate Recruitment and Development

Candidate recruitment is crucial for local committees. It helps identify strong candidates for local offices and helps to build the bench for legislative and statewide

elections. Continuous recruitment and development are key to ensuring candidates are well-prepared when they decide to run for office.

The nomination process should welcome any qualified Democrat who wishes to run. Sometimes, multiple qualified candidates may lead to a contested primary, which can benefit the Party. However, candidate recruitment can be sensitive and potentially divisive.

**Here are ways to handle it without causing issues:**

- Early on, form a committee or group to recruit and assess candidates. Include representatives from funding organizations, allied groups, legislative campaign committees, and DPVA leaders.
- Analyze districts and offices where partisan challenges are likely. Set recruitment targets.
- Maintain a list of potential candidates for various offices. Local committees are best positioned to identify local talent, including community leaders, current and past candidates, and activists.
- Have group members gather information about potential candidates' intentions, resources, electability factors, and challenges.
- Engage influential community figures to encourage potential candidates to run and discuss resource commitments.
- Clearly communicate with each prospective candidate about the committee's support, timing expectations, and campaign effort requirements.
- Anticipate Republican recruitment efforts and inform incumbents about potential challenges based on gathered information.

## **Candidate Recruitment**

Before campaign season, city or county committee officers should find potential candidates for future elections. Even if current officials are long-serving Democrats, be ready for when they might retire or leave. Keep a list of qualified candidates to fill any upcoming vacancies.

**Consider the following when developing a list of potential candidates:**

- School boards, town boards, city councils, and county commissions are great places to find future legislators. Your district should consider whether you should begin endorsing selected candidates for these offices; some local party organizations currently endorse for “nonpartisan” offices, which permits those candidates to start developing a base within the DPVA Party. If you don't



endorse, you should still help find candidates for these offices so they can start building their reputation in the community once elected.

- A candidate who is active in community issues or events is valuable. For example, the president of a civic association, a youth leader, a community activist, or an attorney who helped with a local issue brings a built-in base of supporters and volunteers to a campaign independent of the party organization.
- A good candidate doesn't have to be a popular community leader or elected official. Consider these factors about your district:
  - Important issues to your district
  - Outside factors impacting your race (e.g., national economic changes or a strong statewide candidate)
  - Weaknesses of the likely Republican candidate
- Finding a candidate who can use these factors to their advantage can be as important as finding a well-known candidate. Often, candidates need to run more than once before winning. An initial loss can be valuable by:
  - Building name recognition
  - Learning from earlier mistakes

Your role in choosing a future candidate depends on the vacancy conditions and the Democratic community's mood. In some districts, party chairs actively recruit and select candidates, while in others, Democratic community members prefer to review all potential candidates in a meeting.

You can find more information about timelines, rules, and other topics on the State Board of Elections [website](#).

## Candidate And Campaign Staff Training

Training is crucial for local and constitutional office candidates and campaign staff. Many candidates and campaign teams may not know what to expect in terms of time commitment or have experience with campaign basics like using the voter file, targeting, polling, messaging, and coordinating with other campaigns.

Even experienced candidates and staff need to stay updated on changes in campaign technologies, techniques, and finance laws. Training sessions also allow staff and candidates from different campaigns to connect and for the committee to learn how to better support their efforts. Training programs help build relationships that enhance the committee's credibility. Each candidate you assist could become a useful ally in the future.

### **For successful candidate training programs, you should:**

- Get experienced campaign managers, consultants, and DPVA staff to create training materials, run workshops, and find additional resources.
- Include key players and community leaders in planning and promoting the training.
- Set a budget and timeline for preparing materials, securing locations, sending invitations, and scheduling trainers.
- Invite experienced past and current candidates to attend and share their local knowledge.
- In larger areas, consider regional training sessions to involve more campaigns.
- Seek funding from groups and individuals who usually support campaigns to sponsor the training.

## **Schedule of Office of Election Years**

For information on the various elections for local, constitutional, state, and federal offices and their term lengths, please refer to the [schedule](#) provided by the Department of Elections.

## **Voter File & I.D. Development and Maintenance**

The statewide voter file in Virginia is crucial for planning, budgeting, and running a successful campaign. It helps target, contact, identify, and mobilize voters and can aid in small-donor fundraising, polling, and other activities throughout the year.

## **VAN**

VAN, also known as Votebuilder, is a key tool from the Democratic Party of Virginia. It's an online database that holds the names and other important information on all registered voters in Virginia. This database helps target likely voters for Democratic campaigns and is essential for any successful campaign due to its ability to pinpoint specific voters.

VAN lets users find details about individual voters, identify groups of likely voters, create walk or call lists, and record data from those lists. It also has a "My Campaign" section to track and manage volunteers and committee activities.

VAN is managed by the Democratic Party of Virginia with the help of the Democratic National Committee (DNC). The Virginia VAN is available to all Democratic candidates and committees through the State Party. If your committee doesn't have access, email

[votebuilder@vademocrats.org](mailto:votebuilder@vademocrats.org). *Please be aware that the file is maintained by the state party. Local committees are required to sign a contract to purchase the file and must adhere to the contract in regard to use of the information in the file.*

☐ VA Dems VAN for Beginners

## Voter File Development and Maintenance

In Virginia, voters don't declare a party, so the list of registered voters from the state only shows whether they voted, not for whom. To address this, VAN uses consistent data collection to assign each voter a Likely Party Score, which predicts their partisan leanings based on voting history and campaign interactions. To date, the DPVA VAN database has collected over 19 million survey responses. Additionally, through national partnerships, there are over 50 targeting models and demographic data to enhance campaign efficiency and reduce costs.

**To improve and maintain the VAN Voter File for your city or county, you need to:**

- **Enhancing the basic file:** Add extra information like phone numbers or emails. Identify more voters through phone banks, door-to-door canvassing, or direct mail to improve targeting.
- **Maintaining the file:** The Democratic Party of Virginia handles all aspects of VAN, including costs and upkeep. Committees must sign contracts with the DPVA Information Technology Director to access and update their VAN voter file.

For questions on how to use VAN, email the DPVA at [votebuilder@vademocrats.org](mailto:votebuilder@vademocrats.org) or [political@vademocrats.org](mailto:political@vademocrats.org).

## Outreach

One major challenge for committees is finding enough people to support the Party's programs and campaigns. To attract volunteers, the Party needs to be relevant, active, and visible in the community. Aggressive outreach is key to a strong Democratic program. Each campaign attracts new people who support a candidate or issue. We must keep them involved and reach out to others who support Democratic causes but haven't been active.

In 2010, the DPVA Outreach Committee, led by the Vice-Chair for Outreach, created an Outreach Plan for local committees. The plan advises local committees to form an Outreach Committee and elect a Vice Chair for Outreach or appoint an Outreach

Committee Chair. This committee should build partnerships with key groups and connect with Democrats in their locality.

An aggressive outreach program should involve a diverse group, including young folks and retirees, teachers, farmers, environmentalists, labor and business leaders, minorities, women's organizations, the LGBT community, people with disabilities, pro-choice activists, and community leaders.

**A successful outreach effort involves:**

- **Re-establishing** our relationship with the traditional Democratic voters
- **Showing** our "natural" constituencies that working with the Democratic Party of Virginia is the best way to advance their causes, issues, and concerns.
- **Working** year-round, not just before elections.

We have three resources: people, time, and money. By using our time throughout the year to involve more people, we can achieve more with less money. The more active and visible we are, the more people we can attract and involve.

## **Traditional Democrats**

Candidates will need to spend time and resources courting independent or "swing" voters, but also need to engage the Democratic base.

**Outreach efforts should focus on two groups:**

- **Traditional Democrats in core precincts:** those that were once active in organizational efforts but have not been as involved in campaigns recently.
- **New recruits:** especially young people and Democratic-leaning groups who have never been involved.

Re-engaging traditional Democrats is crucial. Often, Democrats in core precincts (65%+ Democratic) feel overlooked, as candidates only show up late in the campaign and then disappear until the next election. Year-round attention is essential to build a strong organization, reliable volunteers, and voter goodwill in core precincts. Committee leaders can take steps to reconnect with Democrats in these areas and rebuild our base.

**These steps can be:**

- **Listen to voters** about how to organize their communities. Meet with Precinct Captains or Neighborhood Team Leaders and key organizers well before the election to discuss their needs.

- **Collaborate with the Precinct Captain and key organizers** to set up a precinct meeting, such as a coffee or luncheon at someone's home, to bring together local residents, including caucus participants, candidate volunteers, community group members, and regular primary voters.
- If you lack a Precinct Captain or they can't do the necessary work, **involve "precinct coordinators"** and clubs to ensure active workers in the precinct. This is a great way to include energetic new recruits from your outreach efforts.
- **Form a precinct committee** or assign block or area captains to canvass the area and register voters. Plan future events, like a neighborhood event, to reward workers and boost the Party's presence.
- **Recognize those who do the work.** Regularly communicate with them and check in with how they're doing. Invite Precinct Captains and active committee members to events and organize special occasions to honor their efforts.
- **Provide lists and materials** for precinct canvassing and voter registration. Request that these lists be returned with updates on phone numbers, yard sign locations, and volunteers to help build your organization.

## **"Natural" Constituencies**

Many groups support Democratic candidates and causes but may not know how to get involved with the city or county Democratic committee or have never been asked. Lateral organizing involves informing these groups that the Democratic Party values their concerns and needs their help to elect candidates who share mutual interests.

You can reach out to various organizations—social, issue-based, professional, civic, and cultural—for support. There are likely Democrats and potential activists in these groups.

### **When planning outreach, consider these basic suggestions:**

- Identify groups open to support and find a local Democrat with connections to introduce you (e.g., Farmers, Peace organizations, Sierra Club, ACLU).
- Choose credible speakers to represent the committee, such as a supportive officeholder, an expert on relevant issues, or a respected committee officer.
- Research the group's key issues and compare the committee's and Republicans' records. Highlight any shortcomings of the Republicans if the committee's record isn't perfect.
- Follow the group's rules and be mindful of their procedures. They may prefer issue-focused discussions over direct partisan pitches.
- Give out business cards and get a membership list for follow-up. Keep track of contacts for thank-you notes and future outreach.

- Understand that Democrats may not align perfectly on every issue. New recruits can become disappointed if a Democratic officeholder or candidate doesn't meet all their expectations.

Make an extra effort to involve young people. Visit high schools and colleges, speak to classes, and meet with Young Democrats and College Democrats. Young people bring energy, ideas, and skills and can help as interns or volunteers. Given the Republican agenda, they are more likely to support the Democratic platform.

### **Values in Action: Community Visibility**

Personal communication is key to grassroots precinct organization. Even with strong media appeal, candidates and causes gain more support when people in the community discuss them and the issues in their daily interactions with folks.

"Values in Action" involves sponsoring or leading community projects that attract public interest and positive publicity. This brings the Democratic message to life and gives people a reason to work with us.

#### **Here are some examples of possible "Values in Action" projects:**

- Democrats believe in educational opportunities, so the committee sponsors a tutoring project or an essay contest about democracy, with a small scholarship for the winner.
- Democrats care about the environment and fighting crime, so the committee organizes a park cleanup to highlight the need for safe, clean spaces.
- To address poverty and hunger, the committee can host a food drive or volunteer day at a local food bank.

"Values in Action" helps deliver our message, build organization, and fight cynicism. It engages people in core Democratic precincts, boosts our presence in swing areas, and helps the committee understand voters' concerns and expectations.

### **Voter Expansion**

Voter Expansion is a component of the DPVA Voter Protection Program. While Voter Protection focuses on GOTV issues, Voter Expansion works year-round on voter registration, restoration of voting rights, redistricting, election law education, voter education, and tracking legislative and administrative decisions.

## Voter Protection Team

The DPVA's Voter Protection Team organizes voter expansion and protection programs in Virginia. They work to ensure fair and accessible elections for all Virginians. While some efforts are non-partisan, we are a Democratic organization.

## Voter Registration

Voter registration is crucial for expanding the electorate and bringing new voters into the Democratic Party. Virginia has specific requirements for voter registration, so it's important to follow the rules. Guidance on voter registration can be found on the Virginia Department of Elections [website](#).

## Restoration of Rights

In Virginia, felons must apply to restore their voter registration—nonviolent felons use a simple form, while violent felons have a more complex process. DPVA encourages local committees to help inform people about this process. For more information on the restoration of rights, you can visit this [website](#).

## Voter Education

Turning out our voters is important, but they must also be informed. The DPVA and Virginia Department of Elections have materials on common voter questions, photo ID guidelines, absentee voting, and more. Some of these resources are available at [this link](#).

## Legislation

Lobbying for or against changes in election laws is an important role for the Virginia Democratic Party and its local organizations. Legislative activity has long-lasting effects on the election process in Virginia and can be a deciding factor in close elections.

## Relationships with Democratic Elected Officials

Another key aspect of elections is maintaining good relationships with current Democratic elected officials. As a local committee chair, you should keep a list of all Democratic officials in your area and their contact information. Encourage them to

attend city or county committee meetings and keep the community informed about pending legislation to build support.



## Chapter 8: Elections

City or county organizations are crucial for the Democratic Party of Virginia. Committee members provide essential volunteers and support for political campaigns. Strong committees can significantly impact election success. Therefore, city or county chairs and other party leaders need to establish good relationships with Democratic candidates and campaigns.

City or county chairs have demanding roles during an election. They often play lead roles in campaigns for various candidates while also organizing party functions like meetings, fundraisers, canvassing, and phone banks.

The most effective party leaders focus on maintaining the party unit, running a coordinated campaign, and recruiting volunteers rather than getting too involved in any one campaign. However, some committee members should be closely involved in specific campaigns to ensure good communication between the party and its candidates.

### Endorsement In Nonpartisan Races

**Candidates who must or who choose to run as Independents:** In Virginia, some localities require all candidates to run as Independents due to non-partisan election ordinances. In areas where one party is much stronger, a candidate might choose to run as an Independent instead of seeking a party nomination. In these cases, the committee can endorse an Independent candidate, but **this should only be done when there is no doubt that a candidate is truly a Democrat and a supporter of our party**. If you decide to endorse non-partisan candidates, please inform the DPVA by **September 1st** of the election year.

### Precinct Organization

Precincts are the natural political units for organizing a political party's efforts. When precincts are well-organized, the Democratic vote is maximized, helping our candidates win. However, organizing by precinct may not be practical everywhere. In areas with few Democrats or where precinct boundaries don't align with neighborhood growth, the neighborhood team model might be a better option. This model involves groups of volunteers working in specific areas, which could include parts of multiple precincts. For simplicity, this section will use the term "precincts," but you can also substitute "neighborhood team" for the term "precinct."

## Precinct Captain

The Precinct Captain helps campaigns by finding volunteers to talk to voters by canvassing (contacting by door-to-door), making phone calls, arranging meet-and-greets or house parties, recruiting new volunteers, and training and directing these volunteers.

The Precinct Captain is key to getting the party's message out and carries out the party's program by ensuring voters go to the polls on Election Day. An active and effective Precinct Captain can significantly impact the success of the party and its candidates.

### Here's a brief overview of what a Precinct Captain can and should do to help elect Democrats:

1. **Organize and Canvass Your Precinct:** Get a list of unidentified voters in your precinct from the VAN database. Design a program to involve friends or other strong Democrats as volunteers to host block parties, recruit more volunteers, do door-to-door canvassing or phone banking, and implement the precinct organization program.
2. **Know the Law and Rules:** Familiarize yourself with Virginia Election Law, including photo ID requirements and Absentee Voting rules, as well as the DPVA Party Plan (the state bylaws).

The Precinct Captain's role should be clearly outlined, and they should understand their key responsibilities. Party Chairs should provide a job description detailing the basic duties expected.

### Here are some essential tasks a Precinct Captain might handle:

- Know their precinct.
- Coordinate campaign activities within the precinct—at minimum, maintain a list of volunteers.
- Represent and attend committee meetings.
- Register Democratic voters.
- Reach out to newly registered voters.
- Coordinate the schedule for Outside Poll Observers/Poll Greeters on Election Day

These tasks can be done alone, but it's much easier with help. Recruit two to five skilled volunteers from your precinct.

**Know the precinct.** Maps of your area are generally available online. This important task is to show the boundaries and the streets or highways in the precinct. A good idea is for the committee Chair to drive around their city or county, acquainting themselves with the various areas and visiting the Precinct Captains.

**Campaign Coordinator.** The Precinct Captain can be the most useful person a city or county has to help candidates by recruiting volunteers for tasks like voter identification, phone banks, literature distribution, and door-to-door canvassing. If the Precinct Captain prefers not to lead these activities, they should keep a list of interested volunteers to share with the campaign.

**Represent Your Precinct.** The Precinct Captain represents their precinct at committee meetings. They should attend these meetings to ensure their precinct's interests are heard. Local committees often meet monthly, which helps with planning and communication throughout the year.

**Register all Democratic Voters.** One key task for a Precinct Captain is to ensure all Democratic voters are registered. Organize a registration event every few months in your precinct, focusing on areas with more Democratic voters.

**Reach out to newly registered voters.** A newly registered voter program lets you reach voters by contacting them with your message after they register. Use VAN to find these voters each month and send them a pre-written note and palm card from the candidate. This helps increase your visibility before they vote.

**Coordinate Outside Poll Observers/Poll Greeters.** Coordinate poll observers and greeters for Election Day. The Precinct Captain should create a schedule for volunteers to stand outside the polling place, hand out sample ballots, answer basic voting questions, report any issues to voter protection, and help voters contact the hotline if they have issues voting.

## **Training Local Party Leaders and Activists**

To engage and involve activists, it's important to provide proper training. Consider organizing or encouraging committee members to attend training sessions on topics like:

- Using VAN
- Building effective precinct organizations or neighborhood teams
- Direct voter contact
- Voter protection and election laws

- Organizing and Outreach
- Effective media use
- Hosting successful fundraisers or house parties

#### Local training efforts will be more successful if you:

1. Gather materials for Precinct Captains and organizers. Material such as voter lists, locality maps, voter registration forms, and candidate campaign handouts are helpful.
2. Schedule a high-profile speaker for each event to highlight the importance of local activity and encourage attendance.
3. Plan your schedule and budget ahead of time to find trainers, speakers, and sponsors and to make other necessary arrangements.
4. Including everyone. Invite all local Precinct Captains, officeholders and their staff, and members of allied campaign and constituency groups. Even if they don't attend, they will know your committee is active.
5. Keep a list of all attendees for committee records and potential small donor outreach. Thank them for participating.

## Voter Contact

While campaigns usually handle the field program, you can help by organizing enthusiastic volunteers. Create a list of committee members who want to volunteer and share it with the campaigns. It's also useful to understand voter contact methods.

Voter contact can be **direct** or **indirect**. **Direct contact** involves personal interactions like door-to-door canvassing and phone calls. **Indirect contact** includes things like yard signs and bumper stickers, where there's no personal delivery of the message. The difference is in the persuasiveness of the delivery of the message. With limited resources, it's best to use the most effective methods available.

## Door-to-door Canvassing

Door-to-door canvassing is the most effective way to connect with voters directly. It has a greater impact than TV, radio, or direct mail because personal, face-to-face contact is more persuasive.

#### Door-to-door canvassing serves four main purposes:

1. Identifying voter preferences
2. Boosting the candidate's name recognition
3. Finding campaign volunteers or donors

#### 4. Building the campaign's credibility in the community

Door-to-door canvassing is the most effective way to connect with voters. A basic door-to-door program should focus on persuading and identifying voters in key precincts. Volunteers need a script and are trained to talk to voters about the candidate effectively. Canvassers represent the candidate and party and should make a positive impression on every voter they meet.

Volunteers should distribute literature to voters. Any information gathered during canvassing should be added to the committee's or campaign's VoterBuilder file for future use in fundraising, volunteer coordination, and GOTV efforts.

The more times you convey your message to the undecided voter, the better chance you have of convincing them and getting them to vote on Election Day.

### Telephone Program

Local races and state legislative campaigns are often won or lost by a small number of votes. Even a 5% difference can mean a few hundred votes.

#### Phone calls are useful for:

- Identifying undecided voters and the key issues that influence them.
- Persuading these voters based on their concerns.
- Ensuring all known supporters go to the polls.

'Committee planning' means *always* looking ahead and preparing for future elections and organizing activities to support Democratic candidates. Every committee member should be willing to help elect candidates, from the precinct level down to individual voters.

#### Each member of a Precinct Team has basic responsibilities:

- a. **Voter Records:** Local committees should keep their own voter files updated. Each Precinct Team should add new information (like moves or party changes) to VAN.
- b. **Voter Identification:** Identify supportive voters to help with Get Out the Vote (GOTV). Every committee member should assist in this process.
- c. **Get Out the Vote:** Start contacting identified supporters in the last few weeks before the election and intensify efforts in the final week. Remind supporters to vote and track their participation.

- d. **Election Day:** Ensure your polls are staffed inside and out. Offer coffee to volunteers, arrange rides to the polls, target Democratic neighborhoods, and inform everyone about where the victory party will take place.
- e. **Voter Registration:** Note new housing developments and report them. Gather a team, get mail-in registration forms, and visit new residents with campaign literature.

## Absentee Voting Program

In tight races, absentee ballots can be crucial. Decide if you need to mail absentee ballot request forms. Start contacting absentee voters sooner than those voting on Election Day: identify, persuade, and help them apply for, complete, and return their absentee ballots early.

Virginia offers absentee in-person voting.

**To promote this option, send mailings with:**

1. Dates, times, and locations for in-person absentee voting.
2. What you need to bring with you in order to vote- this is the same as on Election Day.
3. A list of Democratic candidates on the ballot.

## Voter Protection

Virginia has a strong voter protection program that we aim to expand.

**Here's how you can get involved and help:**

**Designate a point person and an election counsel.** This person doesn't have to be a lawyer but should be the main contact for voter protection efforts. Additionally, having a lawyer available on Election Day is also helpful. They should be a licensed Virginia lawyer available all day on Election Day to handle legal tasks and file documents at the courthouse as needed by DPVA or the campaigns.

**Recruit poll observers for inside and outside polling locations.** If you can't cover all locations, focus on the most crucial ones. Send the names and contact info of inside poll observers to the Voter Protection Director for training. Inside poll observers will need a [signed authorization form](#).

**Report any Election Day problems:** As Chair of your local Democratic Committee, you are crucial for identifying Election Day issues. If you see any problems that you believe should be reported, call the legal boiler room number provided before each election.

**Share our resources:** The DPVA voter hotline is 1-844-4VA-VOTE (1-844-482-8683). Use this number on all your printed materials. Volunteers will answer voting-related questions. You can also visit DPVA's [voter information page](#) for details on voting and a polling place locator.

Please help spread the word about these resources.

**After Election Day – Canvass and Provisional Ballot Meeting:** In Virginia, often, the election does not end on election day. Prepare for a possible recount. Designate people to cover the canvass and provisional ballot meeting in advance. Each canvass table needs one observer (check the number of tables with your local registrar). For the provisional ballot meeting, assign one observer and, if possible, one voter advocate. These meetings start the day after Election Day. Call your local registrar for the schedule. The DPVA will train your observers if you send their names and contact info to the Voter Protection Director. Provisional Ballot Meeting Observers need a [signed authorized representative form](#).

## Chapter 9: The Money

### Budgeting the Necessary Funds

To create a budget, outline your plan in full detail so that you can set priorities and project costs and establish fundraiser goals. Make sure that your budget is clear, straightforward, and documented. This will serve as your blueprint for action.

#### A. Annual Budget

Every committee with expenses needs a way to cover them. Revenue anticipated for the year should be projected at the same time as an annual budget of expenses is adopted. The projected revenue should equal or exceed the projected expenses.

Annual income projections should include member dues, delegate and alternate pre-filing fees (in convention years), interest from bank accounts or investments, and other expected revenue. Most income will come from active fundraising. A fundraising plan should be made each year with the budget. Each fundraising activity should be listed with its income goals in the projected revenue.

1. **Keeping Accurate Financial Records:** Maintain accurate financial records as proof that all committee funds have been handled properly. The Treasurer is responsible for keeping all financial records, including records of contributions and disbursements.
2. **Adopt a Realistic Budget:** Adopt the actual amount your committee has for expenditures each year. Here is a list of commonly used items; modify these recommendations as needed.

#### Operational Expenses:

- Printing
- Postage and mailing expenses
- Office supplies
- Equipment: a copier and/or printer, laptop, etc.
- Rent
- Utilities
- Telephones
- Voter file purchase
- GOTV expenses
- Miscellaneous



### Fundraising Expenses:

- Advertising and Promotion: Invitations, Announcements, Fliers, Balloons, Newspaper Ads
- Postage
- Facility rental
- Equipment rental: microphone, audio visual equipment, stage, electrical hookups
- Catering
- Wine, beer, and/or liquor and an ABC license
- Entertainment
- Decorations
- Security
- Phone: calls to increase turn out
- Thank you letters

**Note:** A donor can purchase items for your operations or fundraising events. If this happens, your committee needs to track the donation like any other monetary contribution for campaign finance reporting.

### B. Treasurer's Report

There should be a Treasurer's Report at every meeting detailing all the financial activities since the last meeting. A standard report would have the following items, but the report should reflect each organization's budget:

| This Period Year to Date Budget |                     |
|---------------------------------|---------------------|
| Balance Last Report: - \$       |                     |
| Receipts:                       | Disbursements:      |
| Membership: - \$                | Newsletter: - \$    |
| Direct Mail: - \$               | Fundraiser: - \$    |
| Fundraiser: - \$                | Tickets: - \$       |
| Contributions: - \$             | Meeting: - \$       |
| Special Events: - \$            | Contributions: - \$ |
| Other: - \$                     | Training: - \$      |
|                                 | Other: - \$         |

|                             |                    |
|-----------------------------|--------------------|
| <b>Total: - \$</b>          | <b>Total: - \$</b> |
| <b>Ending Balance: - \$</b> |                    |

## Fundraising

### A. Fundraising Plan

A successful fundraising plan should include a mix of activities targeting both high and local-dollar contributors. Individual solicitations and special events are two recommended activities for local committees. Other types of fundraising, such as direct mail and telemarketing, are usually not cost-effective when attempted in relatively small numbers most local committees can supply.

#### A fundraising plan should include:

- **Quantifiable Goal:** Set realistic and attainable financial goals for each activity, considering past amounts raised and projections for revenue increases. Revenue from each fundraising activity should be projected.
- **Time Frame:** Schedule events and solicitations to maximize income and remember to account for community activities, other fundraising events, political campaigns, and voter registration drives. Plan at least one annual special event and one annual solicitation drive for individual contributions, ensuring optimal timing to avoid conflicts. Determining the appropriate timing of fundraising events and solicitation drives is critical and should be carefully considered.
- **Strategies:** Outline steps, assign responsible persons, target the audience, and plan follow-ups for each activity.

#### Each fundraising activity should have a detailed action plan, including:

- Steps to achieve the goal
- The time frame for each step
- Assigned responsibilities

Tailor the fundraising plan to the committee's unique interests, size, and characteristics. Use general guidelines and adapt them as needed. It's often easier to raise money for specific projects or items like voter registration drives, equipment, or office buildings, which can all be incorporated into the plan.

## B. Individual Solicitations

Individual solicitation is an important way to build a continuing, sustaining donor base. Although it may be more difficult to find volunteers to help with this type of fundraising, individual contributions are a cost-effective way to support your operating budget. Many people are willing to donate to the Democratic Party if asked. Most people allocate a portion of their income for charitable or political donations and should be allowed to contribute.

Consider creating a sustaining donor program, where members and community members make annual or monthly contributions above their dues.

### Set up giving levels, such as:

- \$5 per month or \$60 per year
- \$10 per month or \$120 per year
- \$20 per month or \$240 per year
- \$50 per month or \$600 per year
- \$100 per month or \$1200 per year

Sustaining donors can receive benefits like discounted or free event admission, with benefits tiered by the support level. Online fundraising sites like ActBlue make it easy for donors to set up monthly contributions via credit card.

*All written solicitations should include the following disclaimer, either in its own paragraph or the first sentence of the paragraph that it is in: "Contributions or gifts to [insert name of party committee] are not tax deductible."*

## C. Events

Fundraising events are important to have year-round, not just during campaign season. Fundraising events offer Party members opportunities to socialize, recruit volunteers, recognize supporters and officials, and gain publicity for the committee. Having an annual "staple" event helps people anticipate and plan their contributions.

Every local committee event should host at least one **annual** fundraising event.

### Some ideas include:

- Cocktail reception
- Dinner or banquet
- Picnic or Barbeque
- Holiday Party

- Formal ball
- Auction
- Breakfast or dessert social

Please be mindful of legal restrictions on listing federal office holders or candidates in event materials and signage requirements. Moreover, there are legal restrictions on the ability of state officeholders to solicit funds during regular legislative sessions. Please consult your lawyer or call the DPVA for additional information.

## Campaign Finance Reporting/Compliance

Local committees are subject to state and federal campaign finance laws. A summary of the state laws are below. *These laws are subject to change.\**

For the latest updates on state law, visit the [Department of Elections website](#) and click on the link for Political Party Committee Summary. For federal law updates, visit the [Federal Election Commission website](#).

### A. Virginia Department of Elections Requirements

**Do I need to register and file with the Department of Elections?** Virginia Code exempts county and city political party committees in areas with populations under 100,000 (2010 Census) from registering and reporting until they receive contributions or make expenditures totaling more than \$15,000 in a calendar year. Once this threshold is met, the committee must register and report all receipts and expenditures from January 1 of that year. For all other local committees, registration with the Department of Elections and quarterly reporting of all receipts and expenditures is required.

### What types of reports are required and when are they due?

**Local committees are required to file three types of reports:**

#### 1. Quarterly Reports:

- Include all contributions received and expenditures made.
- Due on the 15th of the month following each quarter (ex: April 15th for January–March).
- **Contributions must not be anonymous.**
- Committees are required to report the name, address, occupation ( individuals), or principal type of business ( organizations), and date received for all contributions of \$100 or more per year. Collect this information for all contributors.

## 2. Large Contribution Reports

- Includes all contributions made of 10,000 or greater.
- Each large contribution must be reported within three (3) business days of receipt of the contribution

## 3. Independent Expenditure Reports

- Must be filed if a committee spends over \$1,000 on a statewide candidate or over \$200 on any other candidate during an election cycle
- Reports are due within 24 hours after the expenditure or when the advertisement is first disseminated, whichever comes first

**Are there contribution limitations?** There are NO contribution limits on non federal contributions in Virginia. However, federal law prohibits any political organization from accepting contributions from a foreign national or foreign corporation. Individuals who are permanent residents and have a valid green card are not considered “foreign nationals” and may contribute.

**Can contributions be anonymous?** No. **Virginia law prohibits anonymous contributions.** Further, committees are required to report the name, address, occupation (individuals) or principal type of business (organizations), and date received for all contributions in aggregate of \$100 each calendar year. It is best practice to collect this information for all contributions, since the 99 contributors may exceed \$100 in the future.

**What are the disclaimer requirements for local committees?** • The disclaimer criteria are different for television, radio, and telephone calls. For details on the disclaimers required for these communications, refer to the Department of Election’s Political Party Committee Summary and the “Disclaimers Handout” at the end of this chapter for more details.

**For more information** on filing a Statement of Organization and quarterly campaign finance reports, visit the Department of Elections website and click the link for [Political Party Committee Summary](#). The DPVA is always available to guide local party chairs and officers on campaign finance reporting.

## B. Federal Election Commission Requirements

If your local committee isn’t federally registered, you must comply with FEC limitations, and exceeding them requires registering and filing with the FEC.

**What is the threshold for Direct Contributions made to federal candidates?** The threshold for direct contributions to federal candidates is **\$1,000 per calendar year**.

Direct contributions in excess of \$1,000 would necessitate registering and filing with the FEC.

**Please note the following:**

- The \$1,000 limit on direct contributions and expenses applies to all federal candidates per calendar year.
- Direct contributions include money and in-kind contributions.
- Sample ballots or slate cards with two or fewer federal candidates are in-kind contributions if distributed close to the election and coordinated with the candidate.
- Paying for phones used in a phone bank for candidate IDs is an in-kind contribution.
- If a local committee pays to participate in a community fair or parade to promote a federal candidate, the costs are considered a direct contribution.
- Allocation of in-kind contributions is determined by a “time or space” ratio. In the case of sample ballots when there are two races, the direct in-kind contribution would be 50% of the cost of the sample ballots for each candidate (e.g. for a \$1,000 printing expenditure \$500 for a US Senate candidate and \$500 for a US House of Representatives Candidate).

**What is the threshold for Exempt Party Activities expenditures?** There is a \$5,000 threshold for exempt party activities that refer to federal candidates.

**These activities include:**

- When three or more races are listed, sample ballots or slate cards are considered exempt party activities. In 2016, jurisdictions with local or special elections in November or that are represented by two or more Congressional districts but only produce one sample ballot may meet this condition.
- Campaign materials (bumper stickers, yard signs, etc.).

**What if the threshold for federal contributions is received?** The “contributions received” threshold is \$5,000 for local party committees. Funds specifically solicited or donated for the purpose of influencing federal elections count against this threshold, as do funds received in response to a solicitation that indicates any portion of the receipts will be used to support or oppose a clearly identified federal candidate.

**What are the disclaimer requirements for federal elections?**

- Disclaimers are required on materials that expressly advocate the election or defeat of a clearly identified federal candidate.
- The disclaimer must identify who paid for a communication and must state whether it was authorized by a candidate or the candidate's campaign committee.

Example: "Paid for by the [Locality] Democratic Committee and authorized by [Candidate Committee]."

Example: "Paid for by the [Locality] Democratic Committee, [website, address, or phone number], and not authorized by any candidate or candidate's committee."

- Fundraising invitations for federal candidates must follow FEC regulations. Refer to the appropriate campaign for the specific language.

### Are there federal limitations for Volunteer Activities?

#### Yes. Common examples include:

- **House Parties and Fundraisers:** Volunteers can spend up to \$2,000 per year on food, beverages, and invitations in their homes without it being an in-kind contribution. Hosting elsewhere counts as an in-kind contribution.
- **Phone Banks:** Volunteers using their own cell phones are not part of direct contributions or exempt party activities.
- **Use of Spaces:** Individuals can use their homes, apartment complexes, recreation rooms, churches, or community rooms for volunteer activities. Nominal fees for these spaces are not considered contributions or expenditures.

For more information on federal election limitations, please visit the [Federal Election Commission website](#)

# Chapter 10: Communication

## Developing Good Press Relations

It's important for the committee to designate one person, usually the Chair, to manage press relations. This person should be skilled in dealing with the media. The Communications Director at the DPVA is always available to assist and should be informed of all media inquiries to ensure that we convey a unified message.

### In addition, it's important to:

- **Be Available:** Ensure reporters can get in touch with you- including contact information on your website and/or social media pages.
- **Never Lie:** Know your information, if unsure, gather information and respond later.
- **Transparency:** Let all relevant folks at your party and the DPVA Communications Director know about the inquiry.
- **Fairness:** Be fair when releasing information and try to release information to all media sources.
- **Maintain Contacts:** Regularly interact with reporters, know them by name, and try to connect with them.
- **Core Messaging:** Prioritize clear, core messages over catchy quotes.
- **Deadlines:** Be aware of media deadlines and the best times for coverage.
- **Social Media:** Follow local reporters, papers, TV stations, and other media on Twitter and Social Media for updates and to stay ahead of the coverage.

### Media Interaction:

- **Radio Actualities:** Record quotes for radio stations when issuing press releases.
- **News Events:** Inform media well in advance and provide visuals for TV coverage.
- **Follow-up:** Provide written texts or radio actualities or reporters who can't attend press conferences.

### A. Press 101: Dealing With The Press

#### As Chair:

- **Identify Reporters:** Find out which reporters cover politics for local news organizations.
- **Introduce Yourself:** Make sure reporters know who you are and how to contact you.



- **Build Relationships:** Offer to meet reporters off the record for an informal chat to get to know each other. This helps establish you as a trusted source and you'll begin to know the issues they care about.

Finding out who covers politics is important because now you know who to contact when you have news.

#### Typical news for committees include:

- Regular committee meetings.
- Committee events (fundraising events, caucuses/conventions events).
- Campaign talking points to reinforce party/candidate efforts.

## The Rules

#### These are the three basic categories to speak with a reporter:

- a. **On the Record:** (Always Assume you are on the record)
  - i. Everything you say can be quoted and attributed to you.
- b. **Off the Record:**
  - i. Background information not for use in the story.
- c. **On Background:**
  - i. Information can be used but not directly quoted or sourced to you.

### B. News Releases

A news release is an easy way to disseminate news. It should be written like a news article, favorably reflecting the committee and its events while remaining accurate.

#### The format is standard:

- The first page should include the logo or accurately reflect the source.
- At the top, state that it's a news release, and include the date, a contact person, and a telephone number.
- Indicate whether it's for immediate release or embargoed.
- Add a short headline at the top, and begin the first paragraph with a dateline- the city/town of origin for the statement or event described in the release.
- The first paragraph should cover the essentials: who, what, when, where, and why in one or two sentences.
- Subsequent paragraphs should order facts by importance, with the least important at the end.

## Letters To The Editor: Speak Out

Letters to the editor encourage community dialogue and they affect the thinking of the editor. A letter to the editor can benefit the Democratic Party because letters supporting Democratic candidates, elected officials, and policies constitute free-form political advertising.

### Tips on writing effective letters:

- Think carefully about your message before writing. Focus on one point. Keep letters under 250 words and check publication length requirements. Have a friend review your letter to ensure clarity. Re-read the letter and ensure it conveys your point effectively.

### Avoid the following:

- Grammar errors. Open-ended statements; be concise and support your main points. Overly emotional language.

Always sign your letters. If you hold a public or party office; include your title below your signature for better publication chances.

## Postcards

You can keep in contact with the Democrats in your area very inexpensively through the use of postcards. These are the most effective for brief messages and to announce special events and activities.

## Communications And Message Delivery

One of the most important roles of the Democratic Party of Virginia staff and its local committee organizations is delivering the message about our candidates' and officeholders' accomplishments and countering the opposition's message.

### A. State and National Message and Articulation

Democrats develop an overarching message that incorporates locality-specific themes to highlight key differences from Republicans. If we don't, Republicans will define us by lifting and distorting "extreme" examples from issues and concerns raised by our various constituencies.

- **Broad Theme:** A successful message goes beyond a single issue; it offers a framework and slogan that unites voters behind a candidate, campaign, or party.
- **Voter-Relevant Issues:** Amplify messages through issues meaningful to voters; daily lives.
- **Research-Based:** Support messages with research, facts, and testing. Grassroots efforts often rely on personal feedback.
- **Tailored Messages:** Craft messages carefully without compromising principles.
- **Counter Opposition:** Negative messages are essential. Discredit and disapprove of the opponent's facts to undermine their message.

## **B. Delivering The Message: “Earned” Media, Paid Media, And Rapid Response Networks**

Message development is incomplete without effective delivery systems and adequate resources. Officeholders and campaigns should allocate or pool resources with the Party to designate staff for message delivery.

### **“Earned Media”**

The Democratic Party of Virginia staff and city/county committees face a tough job when it comes to getting media coverage.

#### **Some principles apply universally to every city/county:**

- **Work the media:** Build relationships with editors and inform them of key contacts (city/county Chair, DPVA Press Secretary, or DPVA Chair/Executive Director).
- **Identify outlets:** Know all media outlets, their coverage areas, and styles.
- **Tailor messages:** Adapt the format of your message to suit the medium, without altering its substance.

## **A. NEWSPAPER AND PRINT MEDIA**

- **Press Releases and Op-eds:** Check if the newspaper runs press releases, and guest op-eds, covers events, or publishes regular Democratic columns.
- **Deadlines and Formats:** Learn publication deadlines and submission formats. Confirm if they accept a camera-ready copy.
- **Content Tips:** Keep releases short, and focused, and include a local angle. Submit early to meet deadlines.

## B. RADIO

Radio is often underused, especially in Southside and Southwest Virginia, but it's highly accessible and effective for rapid responses.

- **Interviews and Talk Shows:** Identify stations with call-in interviews or local talk shows. Make key Democrats available.
- **Talk Radio Programs:** Know the programs and their biases. Organize Democrats to call in and present additional perspectives.
- **Event Coverage:** Find out how and when stations assign reporters. Get the names of editors and notify them in advance to allow them to cover your events.

## C. TELEVISION

In large markets, TV coverage is challenging without a celebrity, disaster, controversy, or strong local angle. TV needs visuals and a compelling hook.

- **Visual Hooks:** Use visiting candidates, celebrities, or local impacts of major issues to attract coverage.
- **Contacts:** Learn the names of news or assignment editors. Personal relationships can be beneficial.
- **Deadlines and Timing:** Know the deadlines for airing stories and time events for live coverage. Accommodate reporters' and editors' needs.
- **Sound Bites:** Keep them tight, brief, and on message.

## D. PAID MEDIA AND POLITICAL ADVERTISING

Paid media efforts by city/county committee efforts should be coordinated with the Democratic Party of Virginia staff and complement our campaign advertising.

## Rapid Response Networks

One of the strengths of a good campaign lies in its rapid response effort which ensures that there is an effective message in every media market daily.

### The Goals Include:

- **Repeating** the Democratic message in all media statewide
- **Responding** to Republican attacks on Democratic candidates
- **Recruiting** local leaders to deliver the message locally

**Messengers** are local leaders who serve as surrogates to help get out the message provided by the committee or the campaign regularly.

**Messengers receive information in several formats:**

- **Talking points:** on campaign themes or responses for surrogates
- **Press releases:** for press outlets
- **Sample letters:** to the editor
- **Message alerts:** about candidates' activities and statements

**Keys to a successful rapid response effort include speed, accuracy, and persistence:**

- **Be Quick:** Timely distribution of messages, especially responses to charges, is crucial.
- **Be Accurate:** Ensure all information is precise to avoid embarrassment.
- **Be Aggressive:** Don't hesitate to voice objections to print or broadcast reports, contacting management if necessary.

## **Digital Outreach For Committees: Internet Use By Committees**

### **A. Website**

**Key Website Functions:**

- **Introduce:** The homepage should introduce the committee with the logo, color scheme, and a brief welcome message from the County Chair or a local elected official. It should be clean, easy to read, and serve as a table of contents with icons and hyperlinks to major sections.
- **Engage:** Include mechanisms for online contributions, ensuring the link to donate stands out.
- **Integrate:** Use the website to integrate outreach, fundraising, social media, and email list building.

Ensure your URL is easy to find and SEO-friendly for better visibility in web searches.

#### **1. Introduce:**

- **Homepage:** Your homepage should serve as the primary introduction to the committee, displaying your logo and color scheme to reinforce your brand. It functions as the website's table of contents, with clear icons and hyperlinks to major sections. If your website includes a mechanism for receiving contributions, ensure the donation link is highly visible and stands out on the homepage.

- **Welcome Message:** Include a brief welcome message from the County Chair or a local elected official. This can be presented in text format or multimedia (e.g., video or audio).

## 2. Educate:

- **About:** This section should provide comprehensive information about the city or county committee. It can include details such as the committee's history, key leadership, accomplishments, and information about local elected officials. Adding photographs and multimedia elements like TV or radio commercials can enrich this section and engage visitors.
- **Press Center:** The Press Center should house all media releases, newspaper articles, op-eds, and speeches related to the committee. It is useful to include corresponding pictures and multimedia presentations with speeches and articles to provide context. A blog can also be part of this section, allowing you to create and share content with a local focus.
- **Issues:** The Issues section should detail the committee's stance on key campaign issues. It should include position papers, policy outlines, and relevant links to provide visitors with a clear understanding of where the committee stands on important topics.

## 3. Contact:

- **Contact Page:** This page should provide a comprehensive list of contact information, including addresses for headquarters, leadership, and coordinators. Including a picture of the headquarters or key committee members can make this section more personal and approachable.

## 4. Calendar:

- **Event Listings:** The Calendar section should feature a detailed list of upcoming events, including dates, times, locations, and event details. It should also include information on past events, providing a historical record of committee activities and engagements.

## 5. Take Action:

- **Fundraising:** To maximize contributions, utilize several methods to drive traffic to your website, such as email campaigns, links from related organizations, mentions in newsletters, search engine optimization, and banner ads on partner sites. Ensure every marketing and solicitation piece includes your website address to attract potential donors.
- **Involvement Corner:** Create an online database or form where users can submit their personal information, such as name, address, phone number, email, demographic details, political interests, and comments. This will

help the committee communicate with and organize supporters, enabling activities like email updates, literature distribution, rapid responses to opponents, phone banking, and volunteer coordination.

- **Links Page:** Maintain a Links Page to connect to “friendly” websites, including the Democratic Party of Virginia, the Democratic National Committee, online voter resources, local newspapers, and other supportive organizations. Ensure these linked pages are appropriate and do not contain objectionable or controversial content.

#### 6. Administrative:

- **Bilingual Website:** Depending on the demographic makeup of your city or county, consider offering your website in multiple languages to ensure accessibility for non-English speakers.
- **Privacy Policy:** Your website must include a comprehensive privacy policy that is up-to-date and clearly outlines how user data is collected, used, and protected.

**ALL WEBSITES MUST INCLUDE A “PAID FOR BY” DISCLAIMER!**

#### B. Email

An email program allows you to connect with voters and activists. A successful email program fundraises, moves your supporters to action, is a mechanism for rapid response to breaking news, and keeps your audience involved with committee activity. Email remains the primary form of online communication.

#### I. Email Management:

- **Supporter Management System:** To run an effective email program, use a supporter management system.
  - Options include:
    - Blue State Digital (Used by the DPVA)
    - Mailchimp
    - Constant Contact
    - Action Network
- These programs help track and manage supporters, and analyze how they interact with your emails. For help selecting the right application, contact the DPVA digital team at [digital@vademocrats.org](mailto:digital@vademocrats.org).

## II. Building Your Email List:

- **Opt-In Process:** Ensure you have easily identifiable ways for people to opt into your emails.
  - **Sign-Up Options Include:**
    - On your website
    - Through Social Media Accounts
    - Engaging in Actions and Petitions
  - **Advanced Email Program Options Include:**
    - Location
    - Issues
    - Volunteer Frequency
    - Contribution Amounts

## III. Fundraising:

- **Email Fundraising:** This is a cost-effective method for raising funds. When drafting fundraising emails, address these key questions:
  - **Why now?** Communicate the urgency or current relevance of the appeal.
  - **Why me?** Explain the personal connection or importance of the supporter's involvement.
  - **Will it help?** Describe the impact of the contribution.
  - **How much?** Provide clear suggestions for donation amounts.

### C. Social Media

#### Facebook:

- Create a Facebook Page (not a profile) for your committee to engage with supporters. Moreover, you can create groups for internal committee communication. Use it for internal communications and to share messages effectively.

### D. Text Messaging

To effectively use SMS, ensure supporters give consent to receive messages. Gather phone numbers by providing an opt-in number and including a text update option on event and volunteer sign-up forms.

- **Privacy:** Assure subscribers that their information is handled securely.
- **Frequency:** Be mindful of how often you send messages.
- **Tone:** Use a tone that is engaging and not alienating.



## E. Tips and Tricks

- **Be Strategic:** Ensure your content connects with offline activities and integrates with your overall communications and field plans.
- **Don't Overextend:** Avoid managing too many channels to prevent leaving accounts inactive.
- **Coordinate:** Collaborate with allies and campaigns for joint actions, content sharing, and fundraising to expand your reach.
- **Be Data Driven:** Track metrics like page visits, clicks, and open rates to tailor your program effectively.

# Appendix

## Additional Resources For Chapter 3:

- [\*FEC Party Committee Guide\*](#)
- [\*ELECT Candidate Bulletin\*](#)
- [\*Campaign Finance Reporting\*](#)
- [\*5 Year Calendar of Elections\*](#)
- [\*FEC Dates & Deadlines\*](#)

## Additional Resources For Chapter 4:

- [\*Conflict Resolution Guide\*](#)
- [\*Sample Local Committee Bylaws 1\*](#)
- [\*Sample Local Committee Bylaws 2\*](#)

## Additional Resources For Chapter 5:

- [\*Party Organization Assessment\*](#)
- [\*Step-by-Step Planning Worksheet\*](#)
- [\*Strategic Planning Template\*](#)

## Additional Resources For Chapter 6:

- [\*ELECT 511 Party Certification of Non-Primary Candidate\*](#)
- [\*ELECT 527 Party Certification of Primary Candidates\*](#)

## Additional Resources For Chapter 8:

- [\*Sample Ballot\*](#)
- [\*Sample Volunteer Sign Up Form\*](#)
- [\*Sample Volunteer Sign Up Google Form\*](#)
- [\*Voters' Bill of Rights\*](#)

## Additional Resources For Chapter 9:

- [\*Tips on Successful Special Events\*](#)
- [\*Tips on Successful Individual Solicitation\*](#)
- [\*Fundraising Event Planning Sheet\*](#)
- [\*Post Event Checklist\*](#)
- [\*Event Timeline Checklist\*](#)
- [\*Disclaimer Rules\*](#)
- [\*Memorandum on Local Party Federal Campaign Finance Activity\*](#)
- [\*Department of Elections Summary of Laws and Policies for Political Party Committees\*](#)

### **Additional Resources For Chapter 10:**

- [\*Social Media Resources\*](#)
- [\*Summary of Laws and Policies Political Party Committees\*](#)
- [\*AP Stylebook\*](#)