MASSDEMS

DEMOCRATIC CITY, TOWN AND WARD CHAIR'S MANUAL

Seventh Edition

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Prepared by the Field Services Subcommittee
of the Massachusetts Democratic State Committee

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The Massachusetts Democratic Party would also like to recognize the late Ron Valerio, Past Field Services Chair, and the members of his Field Services Committee for the development of the First Edition of the Chair's Manual.

WELCOME

Welcome to the Seventh Edition of the Chair's Manual! This guide has been prepared by the Field Services Subcommittee of the Massachusetts Democratic State Committee, for Chairs of local city, town, and ward Democratic committees.

This manual is written for Chairs and committee leaders both experienced and new, but with concepts explained at a level that will enable "beginners" to learn and to lead. Why? Because more and more progressive activists are opting to get involved for the first time -- including some who have undertaken the task of starting, or re-starting, local Democratic committees in towns or wards that previously did not have one. While some Chairs take the reins of their committees after years of involvement, others are taking on that leadership role as the committee itself is new. This Manual has useful information for both.

As local Democratic committees, you are the infrastructure of our party. If the campaign of a Democratic candidate for office in your area is understood to be a "house," so to speak, your local committee is part of the foundation, the pipes, and the electrical wiring: you're an existing network of passionate local Democrats to work on behalf of the campaign. Campaigns come and go, but your committee remains to ensure Democrats are organized and active in each and every one of the Commonwealth's 351 cities and towns.

While the work that you and your committee do is critical to the success of Democratic candidates, we recognize that your work can be challenging. Campaigns have a level of clarity and a defined objective that make their imperatives feel more clear: campaigns have specific candidates to inspire volunteers, the reasoning for the canvassing and the fundraising is easy to understand, and Election Day brings with it the culmination and the closure that comes with either victory or defeat. By contrast, maintaining and growing a political organization permanently – outside of a specific campaign or election cycle – can be more difficult to understand and to explain.

This Manual is designed to give you ideas, tools, and examples, in addition to basic information, that you and your committee can use to advance the cause of the Democratic Party in your town or ward. *This Manual is not meant to offer one-size-fits-all solutions*; there are many topics, as you will see, where the approach you choose will depend on your local community and your local people.

We hope that you will find this Manual useful – and we thank you for your service to the Democratic Party!

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Chapter One: The Basics

What is a Democratic Town or Ward Committee?

Your Democratic town or ward committee is the local Democratic Party entity in your community, responsible for organizing local Democrats, working to elect Democrats to public office, and increasing Democratic registration in your neighborhoods.

Your town or ward committee is an official body, recognized both by the Massachusetts Democratic Party and the Commonwealth of Massachusetts (more on filing and keeping your paperwork current later).

Here's the official definition, found in the Charter of the Massachusetts Democratic Party:

> *"The local committees shall conduct, according to duly established and recorded local by-laws, such activities as are suitable for a political organization; among which (without limitation) are:*
>
> - *Endorsement of enrolled Democratic candidates in partisan and nonpartisan primaries, preliminaries and elections*
> - *Financial Support of the State Committee and Democratic nominees*
> - *Adoption of resolutions and platforms*
> - *Raising and disbursing of funds for political purposes*
> - *Voter registration campaigns, and*
> - *Calling of caucuses for the purpose of endorsing candidates, adopting resolutions, or conducting other Party business as provided for in the Call to Convention"*

What is the Role of the Chair of a Town or Ward Committee?

Per the Charter of the Massachusetts Democratic Party:

> *"The local chairperson shall be the principal executive officer of the town, ward or city committee, with primary responsibility for enforcement of the provisions of this Charter and by-laws at the local level and for communications between local committees and the State Committee. The chairperson shall preside at all meetings of the local committee and at caucuses called by it*."

You're the leader! In addition to carrying out your more basic responsibilities (we list those here, and provide more details on them later), members of your committee and Democrats in your community will look to you for guidance on getting involved in the Democratic Party, and how to work to elect Democrats and support progressive causes locally.

As Chair, you will:

- ***Look for and execute opportunities for your committee to help elect Democrats!***

- Call and run regular committee meetings, including your annual caucus to select delegates to the Democratic State Convention
- Make sure all paperwork for your committee is current, in conjunction with your committee's Secretary
- Oversee your committee's finances, in conjunction with your Treasurer
- Act as the principal spokesperson for the party in your town or ward, taking initiative in outreach and communications tasks (or recruit a principal spokesperson for the committee)
- Engage in recruitment efforts, and welcome those interested in getting involved in your committee

Seems like a lot? Some days, it can be! But bring your passion for the Democratic Party to the role, and recruit a solid team to work in the trenches with you, and you'll find that being Chair is fun, and that you can make a real difference.

Okay. So, What Should We Be Doing?

A big question that, in truth, this entire manual sets out to answer! Here are some basics to give you some overall direction (we'll have more details on each of these later):

- Organize your committee in volunteering for and assisting in Democratic campaigns. Recruit your members and participants to volunteer for Democratic candidates, take charge of setting up canvassing, phone banking, or visibilities in your community where appropriate.
- Convene discussions, panels, and forums on issues of importance to Democrats in your community, as a means of highlighting party values, and drawing in new Democrats.
- Reach out to potential new members or volunteers, and recruit them for the party.
- Reach out to diverse communities within your town or ward, to bring them into the party.
- Each year, hold a caucus to elect delegates and alternates to the Democratic State Convention, representing your town or ward.

This list is just a starting point -- you will find helpful direction on these and other topics throughout this manual. Remember, **the worst thing that you can do is nothing** -- it's okay if a meeting or event doesn't go exactly as you'd hoped, but it's *not* okay if your committee never does anything!

Membership

Before we get into the details here, it is important to understand that **folks are welcome to be involved in your committee (i.e. attend meetings, take part in your activities and events, etc.) *without being full voting members*.** Only full voting members (and in some cases, associate members) may vote on formal committee business, but ***anyone*** is welcome to attend your meetings, volunteer for and with your causes, be on your email lists, etc. Your meetings are **required** to be held in the open, in public, and you cannot exclude anyone, save for someone

being disruptive. Many Chairs get hung up on formal membership; not everyone who wants to be involved and help out is interested in being a full voting member -- and that's okay!

Here are the basics of membership:

- Members must be registered Democrats residing within your town or ward.
- Members are elected on the Presidential Primary Ballot in your town or ward, every four years, usually in March during the year of a Presidential election (the exact date changes each time).
- Each committee has between 3 (minimum) and 35 (maximum) elected members. This number varies by town or ward, but in most cases is set at 35. Your committee determines its own size during the summer before a Presidential election year. Not sure of your committee's current size? Call the Secretary of the Commonwealth's Office (Elections Division) and ask, 617-727-2828.
- **When you have vacancies** on your committee (i.e. fewer people than your full complement of elected members), your existing members may vote on new members up to your maximum number. Associate members, if your committee has any, should be given priority *consideration* for full membership slots. Per the State Party's Charter, "*Vacancies in local committees shall be filled by vote of that committee. Associate members, if any, shall be the candidate(s) for filling any committee vacancies.*"
- Once someone has served on your committee for 20 years, they are able to remain on your committee without counting against your total allotment -- i.e., they remain on the committee, but you can fill their slot with a new person as well. These folks are **sometimes called "Lifetime Members" or "20 Year Members,"** but their voting status is just the same as regular members. This is done so that seats can open up regularly for new people, while continuing to include and honor longtime members. It lets in the new, without excluding the old. Work with your Secretary to ensure your membership roster information is current, and notes the year or date on which someone became a full voting member. If your current roster does not contain the year or date when individuals became members, examine your committee's past Change of Officer or membership update forms, or past Presidential Primary results in your community, which will help determine how long members have served.
- Publicly opposing the nominee of the Democratic Party in a partisan election (i.e., supporting a candidate who runs against the Democratic nominee, be that candidate a Republican, third party candidate, or unenrolled candidate) is grounds for removal. "Support" includes any **public** display of support, such as making a campaign donation, placing or holding a sign, writing a letter of endorsement, etc. Note this does not apply to non-partisan elections (most municipal/ local elections in Massachusetts are officially non-partisan).
- Members of the Democratic State Committee and members of the Democratic National Committee who reside in your town or ward are automatically members of your local committee; they do not count against your allotment of 35 members.

Associate Members:

- A committee can have an unlimited number of “Associate Members,” depending on your local by-laws. These are above and beyond your full complement of full voting members. Though their roles vary by committee, some local committees allow participation in discussion by associate members, but not voting. Others allow limited voting, such as voting on all issues except membership and officers. Associate membership is a great way to give formal recognition to active participants, when you do not have open or available membership slots.

“Membership, as defined by the Charter of the Massachusetts Democratic Party (we’ve been through these concepts already, but here are the formal definitions):

- *Town and ward committees shall have between 3 and 35 members, who shall be elected at presidential primaries with filing for the office by individual candidates in conformity with State Election Laws. All members of the ward, town and city committees shall be enrolled Democrats.*
- *City committees shall be composed of all ward committee members within a municipality.*
- *With respect to current numbers of the town committee who served as such for 20 or more years or current members of any ward committee who have served within such city for 20 or more years, said member's elected position on the town or ward committee shall be vacated after the member has served over twenty years and he or she becomes a voting member of the town/ward committee.”*

Removal of Members. While likely something you won’t have to do, your by-laws (or the Model By-laws, in the absence of your own -- more on that in the next section) provide for a process to remove members as needed. As mentioned, publicly opposing the nominee of the Democratic Party in a partisan election is grounds for removal. **We recommend consulting with State Party staff at 617-939-0800 before embarking on this process.** Here is the language taken directly from the State Party’s Charter regarding the removal of local members:

“Members and officers pledge themselves by accepting office to perform diligently and honorably their duties or resign. Members of town and ward committees may be removed by procedures guaranteeing adequate notice and due process and by a 2/3 vote of those present and voting, a quorum being present, for:

a. failure to attend at least half of the regularly scheduled committee meetings during any calendar year.

b. publicly endorsed or supported any candidate whose announced intention is to oppose the nominee of the Democratic Party which nominee publicly supports the majority of the platform of the Democratic Party as adopted at the most recent state and national Democratic conventions. A member for whom a long and deeply held belief would be violated by support of the nominee shall not be removed under this section.

c. unauthorized use of the Party name or resources.

d. conviction after appeals are exhausted of a criminal offense other than a misdemeanor. A member must be given an opportunity to resign before notice of the hearing on the question of removal is given to the membership of the committee. If a ward, town or city committee refuses to act upon or remove a member duly charged, the

charge may be appealed to the Judicial Council. A member removed under this section shall have 30 days to appeal to the Judicial Council, and the vacancy may not be filled in such case until the final decision of the Judicial Council is made."

Again, it is recommended here that you contact and consult with State Party staff before attempting to remove a member.

By-laws

Each town or ward committee has its own by-laws, which must be in alignment (i.e. cannot violate) the Charter and By-laws of the Massachusetts Democratic Party. While the basics of committee structure are determined by the State Party, some local decisions (i.e. how many Vice Chairs you have, what your associate members can and cannot vote on, etc.) are left to your local by-laws.

Don't have a copy of your committee's by-laws?

- Reach out to a past officer of your local committee to see if they have a copy.
- In the absence of by-laws for your local committee (i.e., it's a newly-formed committee and you've not set your own local by-laws yet), **the State Party offers a set of Model By-laws that are in effect for your committee until you adopt your own.** The Model By-laws are available online at MassDems.org. *Under the State Party's By-laws, these Model By-laws for local committees govern your Committee unless you have duly approved your own local by-laws.*

Other Officers and Their Roles

We've discussed the role of the Chairperson -- now let's get into other officer positions. Note that while every local committee must have a Treasurer, a Secretary, and an Affirmative Action and Outreach Advisor, each committee is different in how it establishes other officers.

The ***Secretary*** keeps a true, accurate and complete record of the proceedings of the meetings; issues written notices in advance of all meetings of the committee; and is responsible for the incoming and outgoing correspondence of the committee. The Secretary is responsible for maintaining the mailing list of the committee; for many committees, this includes the email distribution list or system.

The ***Treasurer*** has the care and custody of all funds of the committee; receives all incoming moneys and pays out all moneys for expenses, donations and other expenditures required in the conduct of the committee's business; and keeps an accurate, up-to-date financial record. The Treasurer makes an annual report of the committee's finances, in addition to periodic interim reports. **For more information on campaign finance, see Chapter Five: Finance 101.**

The ***Affirmative Action and Outreach Advisor*** encourages full participation by all segments of the population, leading and coordinating outreach to marginalized communities including but not

limited to underrepresented ethnic and racial groups, persons with disabilities, LGBTQ+ individuals workers, youth, low and moderate income people, women, and senior citizens.

With regard to other officers, the Charter of the State Party merely states *"Other officers shall have such duties and responsibilities as assigned by the local by-laws, chairperson or committee."* The following are suggestions; your local Committee may choose to adopt any or all of them, or others.

The ***Vice Chairperson***, in the absence or inability of the Chairperson, assumes the duties of the Chairperson. In the event of removal or resignation of the Chairperson, the Vice Chairperson assumes the office of Chair. Some committees have more than one Vice Chairperson.

Some committees opt to have ***Co-Chairs***, who assist or share in the responsibilities of the Chairperson. While this model may make sense in some communities, if your local by-laws allow it, please **note that one person alone must still be designated as the *principal* Chairperson** on your committee's paperwork (more on this later) and with the State Party for communications purposes. Note also that while a committee Chair is an automatic delegate to each Democratic State Convention, only one person may fill that slot – creating Co-Chairs does not allot your town or ward additional convention delegates.

Meetings

Note: This section is just a brief overview; the entire next chapter is devoted to programming and activities for your committee!

The Charter of the state party requires that:

> *"Town, ward and city committees meet at least four times each year, at least once each quarter, at the call of the chairperson. Special meetings may be called by the secretary on receipt of a signed petition from no fewer than 20% of the membership of the committee."*

Many committees hold more than four meetings per year. Some Committees hold "general" meetings, which feature guest speakers, dinner, social time, etc., as well as "business" meetings for the conduct of such affairs as officer and committee reports.

Meetings serve a number of important functions. They:

- Enable members and interested Democrats to gather, meet one another, and plan campaign activities.
- Handle routine business matters such as Treasurers' reports, subcommittee reports, the approval of minutes, the election of officers, etc.
- Host guest speakers, and give a forum for Democratic elected officials and candidates to address local Democrats.
- Regular meetings, at set times and locations (posted publicly to social media, websites, community news sources, etc.) provide an opportunity for Democrats looking to get

involved for the first time to have a starting place, and to stop by to learn what you're all about.

However, it should be noted that ***meetings are where planning and discussions take place; the work of electing Democrats does not happen in meetings***! Engaging in campaign activities on behalf of Democratic candidates should be the committee's principal focus; meetings are where planning for campaign activities can take place, but meetings themselves do not knock on doors or talk to voters. Your committee should meet regularly, but ***meetings are a means to an end -- not an end unto themselve*s.**

Be sure to collect the contact information of everyone who attends your meetings -- always have a sign in sheet that collects email addresses and phone numbers. Ask people to write legibly. Add new and first-time attendees to your email lists on a regular basis. Keep your sign-in sheets for recruitment purposes when campaign time comes!

In terms of when, where, and how often to schedule meetings, a few things to keep in mind:

- Your meetings must take place in spaces that are compliant with the Americans with Disabilities Act (ADA), and open to the public. Even if a building meets ADA standards, avoid spaces that are difficult for persons with disabilities to access.
- Virtual/remote meetings may be necessary or preferred from time to time, especially if required by public health guidance; there is a section in this manual on running virtual/ remote meetings and events.
- While you are allowed to hold meetings in publicly-owned buildings, remember that you cannot conduct fundraising activities or collect funds in a publicly owned building (including but not limited to a city or town hall, public library, or public school). *More on this in Chapter Five: Finance 101.*
- Setting a regular, recurring meeting day and time (for example, "the second Monday of the month at 7PM") can be helpful, as your members will know when to show up without needing to be informed of each date and time, and folks looking to stop by for the first time know better when your meetings will be. Keeping the location consistent is helpful in this regard as well.
- Each community is different; do what makes the most sense for your members and your community! Some committees meet on weekday evenings in large meeting spaces, while some committees in smaller communities may opt for a Saturday morning in a local coffee shop. *Do what works for your people, and your community!*
- Generally speaking, do not hold meetings during traditional working hours, too late in the evening, or on holidays. The best times for meetings are after 6PM Monday through Thursday, or during morning and daytime hours on Saturday or Sunday. While you will never find a time that is convenient for everyone (especially if you have a large group), consciously avoid scheduling that excludes entire groups of people.

Subcommittees

While not required, many local committees opt to create subcommittees that focus on particular areas of work, or even to plan specific activities and events. Subcommittees can be a good way

to assign meaningful work to members, better organize members to address specific tasks and meet specific needs, and provide additional opportunities for leadership roles. Examples of subcommittees include:

- *Recruitment:* to organize outreach efforts to potential new members and activists, and plan events or activities designed to attract or welcome them.
- *Fundraising or Finance:* to develop and implement fundraising activities, and/ or to plan fundraising events.
- *Finance/ Audit:* to assist the committee's Treasurer in reviewing committee finances on a periodic basis.
- *Campaign Support:* to plan specific campaign activities in support of the Democratic Ticket and to coordinate member involvement with campaigns; coordinate canvassing, phone banks, and visibilities.
- *By-laws:* to study and propose changes to your committee's by-laws (as needed), consistent with the State Party's Charter.
- *Programming or Issues:* to plan forums or invite guest speakers to address particular issues of interest to members.
- *Social Media and/ or Media Relations:* to coordinate the committee's social media presence (ensure regular and engaging posts), coordinate news releases and letters to the editor.
- *Youth Services or Youth Outreach:* to focus on recruiting young Democrats.

Starting a New Committee Where One Does Not Exist

What can you do to start a new local Democratic committee if there isn't already one in your town or ward? Follow these (surprisingly simple!) first steps:

1. First, double-check that a local committee doesn't already exist. Visit MassDems.org, and see if your community is on the list of local committees. Call the State Party office at 617-939-0800 and ask. You should also contact your Senate District's Democratic State Committee members for guidance; their contact information can be found on MassDems.org
2. None exists? You're good to start your own. Find two other registered Democrats in your community; three registered Democrats are necessary to start a new committee. Have more than three? That's great -- the more, the merrier! Once you have three members, petition the State Party to be appointed; there is a form on MassDems.org to do this.
3. After submitting your form and speaking with State Party staff, hold an organizational meeting. As with regular committee meetings, you should hold it in a public space that is ADA compliant. Post the meeting in your local paper or other commonly-read news source.
4. At your organizational meeting, elect a Chairperson, Treasurer, and Secretary. Any registered Democrats residing in the community who attend the meeting may take part in this election.
5. At the meeting, complete the "Statement of Organization" form from the Office of Campaign and Political Finance (available to download on their website www.OCPF.us).

On the form, indicate who your officers are, and list any members you have. Your Treasurer and Secretary must both sign this form.

6. Make four copies of the completed form. Mail the original to OCPF, and one copy each to your local City or Town Clerk, the State Party, and the Secretary of the Commonwealth's office (these instructions are on the form itself). Have your Secretary keep the fourth copy for your records.
7. Call the State Party to make sure the form was received; make sure your Chair's contact information is listed on MassDems.org
8. And you're good to go!

Reorganization

Committees need to "reorganize" every two years; "reorganization" is just a term for the meeting where you elect your committee's officers. Your reorganization meeting must take place in even-numbered years prior to April 15th. In years with a Presidential election, the reorganization must occur within 45 days after the Presidential Primary has taken place. **A committee may, in their local by-laws, choose to reorganize every four years instead of every two.**

After reorganization, submit a change of officer form from the Office of Campaign and Political Finance (available to download on their website www.OCPF.us). On the form, indicate who your new officers are, and provide a complete list of current full voting members. Your Treasurer and Secretary must both sign the form. Make four copies of the completed form. Mail the original to OCPF, and one copy each to your local City or Town Clerk, the State Party, and the Secretary of the Commonwealth's office (these instructions are on the form itself). Have your Secretary keep the fourth copy for your records.

From the Charter (again, just the formal language for your background knowledge): *"Officers shall be elected every two years; except that a committee in its by-laws may provide for a four year term, running with presidential terms; at the local committee's organizational meeting, which shall be held no later than April 15th in non presidential years and as defined in state law in presidential election years."*

The State Democratic Party (Democratic State Committee)

This section will provide you with some general background on the State Party, and also how (and why) to get in touch with your local State Committee members:

The Massachusetts Democratic Party, governed by the Democratic State Committee and led by its Chairperson, is our statewide Democratic Party entity. It is established by the Charter of the Massachusetts Democratic Party, and governed under that Charter and the Party's by-laws. Its role is to elect Democrats to state and federal office, and support local city, town, and ward committees in their efforts to do the same locally.

Local committees in Massachusetts are organized under the auspices of the State Party, and may not violate the State Party's Charter or its By-laws.

Members of the Democratic State Committee are elected as follows, each for four-year terms:

- One man and one woman from each State Senate district, who are elected on the Presidential Primary ballot.
- One man and one woman from each State Senate district, who are elected by a caucus of local town and ward committee members.
- Those State Committee members who have served for twenty years or more become lifetime members, with the goal of opening up their seats to newer activists.
- Certain Democratic Party elected officials who are ex-officio members, including but not limited to Democrats elected to statewide office, and members of the Democratic National Committee who live in Massachusetts .
- Roughly 120 additional members comprising various underrepresented minority groups, including veterans, LGBT citizens, and college-aged youth representatives. These additional members are elected at-large by the State Committee members indicated above.

Reach out to the Democratic State Committee members who live in your State Senate district, and ask them to come to your committee meetings. They are a great source of information on what's going on with the State Party, and can provide useful guidance on any number of topics. Many of them have extensive experience being involved with their local committees, and can provide insights that are helpful. They are also able to communicate your committee's concerns, issues, and requests back to the State Party.

How do you find out who your State Committee members are? Visit MassDems.org, which at all times contains a complete listing of State Committee members. This list can be sorted by both State Senate District and City/ Town. The listing contains contact information for State Committee members.

Party Staff

The Chairperson of the Democratic State Committee, who is the chief executive officer of the State Party, hires staff to manage party activities. These include an Executive Director, a Communications Director, and often additional staff focused on Field, Recruitment, Outreach, and other activities. *These folks are incredibly helpful, and happy to assist your efforts at the local level in any way possible*. Their names and contact information are always included on the State Party's website, MassDems.org.

The National Democratic Party (Democratic National Committee)

Similar to the section on the State Democratic Party, this will give you a brief overview of the Democratic National Committee and its role.

It's important to point out here that the Democratic Party is a broad, loosely-organized coalition, as opposed to a rigid corporate structure. **The DNC does not (and cannot) give marching orders to local parties; your committee must take its own initiative to be active in your community!**

The DNC's role is as follows:

- To organize and host a Democratic National Convention every four years, which formally selects the party's candidates for President and Vice President of the United States, and set a platform (which candidates are not, in fact, bound to)
- To establish the rules and calendar under which states allocate their delegates to the National Convention, which in each state happens by primary or caucus (the timing and specifics of which are decided largely by each state)
- To provide resources to support Democratic campaigns for major offices
- To provide financial and organizational support, as well as other resources, to state Democratic Parties

The DNC itself **does NOT** select the party's candidates at any level (candidates are chosen by voters in primaries, caucuses, and/ or conventions depending on the office or jurisdiction), nor does it exercise authority over any Democratic campaign.

The DNC is composed of the Chairs and Vice Chairs of each state Democratic Party committee, and more than 200 members elected by state Democratic parties in all 50 states and the territories, apportioned by population. Its chair is elected by the committee membership. There are an additional 75 At-Large members appointed by the DNC Chair.

New Chair Checklist!

Are you a new Chairperson? Here's a checklist of your first tasks (these topics are covered in greater detail elsewhere in this manual):

- Read this manual (hey, look at you -- you're already making progress! Keep it up!)
- Complete and submit a "Change of Officers" form: this can be found online at http://files.ocpf.us/pdf/forms/cpf_101_wtc.pdf (check off the "Change of Officers" box near the top). You will make 4 copies of this form; the form includes instructions on where to mail the original and 3 copies. The last copy, keep for your committee's records.
- Call the State Party office at 617-939-0800 to let them know you're now Chair, and give them your contact information
- Connect with your fellow committee officers and solicit their input
- Obtain passwords and login information to committee email and social media accounts (in the case of Facebook, have yourself added as an Administrator to the committee's page), as well as the committee's VoteBuilder account, as needed
- Get a meeting set up, and plan your first agenda!

Chapter Two: What Your Committee Should Be Doing: Electing Democrats! *And Other Programming*

Putting Your Committee to Work Electing Democrats

The most important role of town and ward Democratic committees is to work to elect Democrats to local, state, and federal offices. Meetings don't win elections -- only engaging directly with voters in your community will really make a difference. So, what can you do?

Remember that the worst thing your committee can do is nothing. It's okay if you don't always succeed in your efforts: strong efforts on campaigns, even unsuccessful ones, yield new activists, new volunteers, and future candidates!

The best resource that you can provide to Democratic campaigns is PEOPLE. Your committee offers local Democrats who can be the most effective representatives to their neighbors on behalf of the Democratic ticket.

Connect with Campaigns, and Offer to do Real Work:
Reach out to Democratic campaigns for federal and state office in districts that include your community. Most statewide and Congressional campaigns will have a staff member, usually called a "Regional Field Organizer" or similar title, who is responsible for your area (usually a county, Congressional District, or other defined region). Discuss with that staff member the best ways for your committee to be of assistance to the campaign. Examples of what you can do:

- Offer to coordinate, lead, or simply provide a launch location for door-to-door canvassing. Campaign staff will typically be able to provide lists of targeted voters, instructions, and literature; what they may need help with is local Democrats to recruit volunteers, or even provide a location for volunteers to meet, get trained, and get their materials.
- Same for phone banks: identify phone bank locations in your community; campaigns can provide call lists and scripts. Cell phone banks can be hosted in private residences.
- Coordinate lawn sign placement or other visibility activities (standouts in a visible location in your community, etc.)

Helping out with Democratic campaigns helps your committee, too, in more ways than one:

- It shows your members that their work is making a difference. Folks will become discouraged if they attend only a series of meetings, but never engage in actual campaign work.
- When people who live in your community sign up directly with a candidate's campaign to volunteer, **it helps your committee to get to meet them and bring them into the fold!** Organizing the canvassing, phone banks, or visibilities in your community means the campaign will be sending those volunteers your way -- potential new recruits for your committee!

Want to learn more about voter contact, and effective techniques to support electing Democrats? The Best Practices Institute (BPI), the shared training department of the Democratic National Committee (DNC) and the Association of State Democratic Committees (ASDC), has developed more detailed voter contact training resources. Reach out to MassDems staff to explore these resources.

Pre-Primary Neutrality and Endorsements

Your committee functions to support Democratic candidates for public office, however it is often the case that multiple Democrats will seek the same office and compete against one another in a Democratic primary election. Without a formal endorsement vote (which requires a specific process; more on that below), ***your committee should remain neutral in contested Democratic primaries***. What does neutrality mean in this case?

- You cannot use your committee's resources to support one Democratic candidate over another (activities that promote ALL Democratic candidates equally are fine). Resources include but are not limited to money and communications tools (your email distribution list, etc.).
- Opportunities extended to one Democratic candidate in a contested primary, should be extended to all Democratic candidates in that primary. For example, if you extend an invitation to one Democratic candidate to speak to your committee, you should also extend an invitation to the other candidates (not necessarily at the same meeting). Another example would be if you agree to promote one candidate's event on the committee's Facebook page, you should be willing to do that for the other Democratic candidates as well.

Individual members of the committee are not prohibited from individually endorsing candidates in such contested primaries; it is only the committee itself, and the committee's resources, that must remain neutral.

Given that Massachusetts holds its primary relatively late, in September, you may be wondering what your committee can do to elect Democrats in advance of the primary. Focus your committee's efforts on supporting Democratic candidates who do not face contested primaries -- there are usually several. You may also contact the State Party to discuss what coordinated campaign activities are available. Focusing your efforts on recruitment during the pre-primary season is also advisable; build up your bench of volunteers and activists in advance of the general election.

Endorsements

The question of whether Democratic city, town, and ward committees are allowed to endorse Democrats running in contested primaries is a common one. In short, your committee is allowed to endorse **IF your by-laws provide for a process to do so**. The Model By-laws provided by the State Party do *not* contain a local endorsement procedure. If your by-laws do not contain an endorsement procedure, you may not endorse pre-primary.

Endorsing a Democratic candidate in a contested primary can have the consequence of alienating members of your committee who support another Democratic candidate. If your by-laws allow for it, it is recommended that an endorsement be made only when support for a particular Democratic candidate on your committee is **overwhelming and near-universal.** Dividing Democrats against one another in your own community is counter-productive, and may rob your committee of credibility if such an endorsement does not fully or largely represent the will of Democrats in your community. Note also the possibility that your endorsed candidate may not win the primary, and might not become the nominee – your committee is still expected to work hard for the Democratic nominee in the general election, regardless of any pre-primary endorsements that may have been made.

Formal endorsements are not necessary to work on behalf of or support Democrats who have *already won the nomination, or who run unopposed for the nomination*. If there is already a Democratic nominee or only one Democrat running, you're free to get right down to work in helping them out -- you don't need to take a special vote of any kind.

Working to Unite Democrats After a Primary

As Democrats in Massachusetts, we are often blessed to have multiple strong, solid Democratic contenders competing for the same office in a contested primary. As a local Chair, ***you have an important role to play in uniting the party after a primary***, to ensure we're all working hard for the ticket in the general election! Plan local "Unity Events" where appropriate to bring your activists together and get them motivated after a primary. Reach out to your members and activists who may have supported a candidate who failed to win the nomination, and ***invite*** them to help out in the general election campaign. Encourage supporters of the victorious candidate (now your nominee!) to be welcoming towards those who backed other Democrats pre-primary. If conflict or bruised feelings fester between your members after a hotly contested primary, appoint yourself "mediator" and work to smooth things over – you need all rockets firing in the same direction to achieve victory!

Volunteer Tips

Organizing your members and other local activists means you're in the business or organizing and managing volunteers! No matter what the committee is working on, as Chair it's important to take a leadership role in ensuring that volunteers you helped to recruit are managed well, to ensure they keep on helping in the future and stay involved. Here are some tips:

(Those loyal readers of the "Dem Dispatch" may recognize these tips as being adapted from those of Kate Donaghue, longtime Chair of the Westborough Democratic Town Committee and a member of the Democratic National Committee from Massachusetts):

- **Welcome volunteers.** Greet volunteers and make them feel welcome. Introduce yourself when a volunteer arrives at the site of whatever activity is taking place. If you

can’t be there yourself, make sure someone is in charge of welcoming and greeting volunteers. Part of the "welcome us" rule includes making sure that new people are introduced to other volunteers. Pair up experienced volunteers with newcomers.

- **Give volunteers meaningful and achievable tasks -- do not waste their time.** Plan ahead. Know what tasks need to be done. Avoid a situation when a volunteer walks in to help and is told that there is nothing to do, or a volunteer calls ahead and is told don't bother coming in.
    - Be creative. Every time you might otherwise think, "This is important and needs to get done, but I don't have the time," think of how the task could be tailored to allow a volunteer to own it.
    - Ideally campaigns should have available a variety of tasks, suited to volunteers’ individual strengths. Usually canvassing is the focus, but be ready to offer tasks to those folks who are unable to canvass.
    - Explain the context of what you are asking volunteers to do. Let volunteers know how voter contact helps the campaign reach its goals.
    - Lead by Example: If volunteers see you doing the same tasks that you are asking them to do, that sends a powerful message that these tasks are valued. Avoid taking “down time” in front of volunteers.
    - The corollary, "don't waste our time," includes good, concise training. Some campaigns may consider it more efficient to do one big training, even if it means volunteers who are ready to go are waiting. Train volunteers in small groups, and then get them going. Asking a volunteer to go to a staging area at 6:00 AM and not having an assignment for the person is disrespectful.
    - Volunteer time is not an expendable resource. Don't tell volunteers to arrive hours before they are needed. Have your materials, coffee, refreshments, etc. ready to go a few minutes in advance of the scheduled task time. Be ready to start training once people arrive.
- **Treat volunteers with respect.** It is important to respect the fact that volunteers are giving up time from their families and paying jobs to volunteer. Give them the respect of responding to their phone calls and emails. Tell volunteers what their specific task is geared to accomplish, i.e. what the goals are. Part of treating volunteers with respect is to not make people feel like failures, especially when dealing with forces beyond their control. Respect their experience and knowledge of their community.
- **Feed them.** This can be as simple as offering volunteers a cup of coffee during a cold standout, or a bottle of water before and after a hot canvass. Granola bars and raisins are easy-to-manage food. Some volunteers might find providing homemade snacks to be an enjoyable way to help. There are great cooks and bakers in the volunteer ranks! It saves money and adds a nice atmosphere. A little sustenance makes volunteers more efficient, obviating the need for breaks to buy food.
- **Keep it fun.** If volunteers are having fun, they are likely to come back! Build a sense of camaraderie in the volunteer corps. Add a social component at the end of the task. Bring humor and levity to the work you do. The more people enjoy themselves, the less work you’ll need to do to recruit them in the future.

- **Thank your volunteers.** Be sure to express your gratitude, directly, to volunteers for the work they do. If you have candidates or Democratic elected officials at your events, mention to them if a member or volunteer has been working particularly hard. Thanking volunteers can include sending them an email or a text, or making a phone call -- it is a simple task that can really go a long way with the person receiving the gesture. The occasional "thank you gathering" is never out of place. As Hillary Clinton -- one of the most prolific writers of Thank You notes and letters in politics -- is fond of saying, *"Practice the discipline of gratitude."* Thanking people isn't something you should do only when you think of it; after any major effort or event, set aside dedicated time to thank those who helped.

Sharing Your Knowledge

One of the most important roles for local Democratic Party committees, as opposed to individual Democratic campaigns, is to share your knowledge. Campaigns come and go, but your committee remains, and your members have experience campaigning locally. You know your community in a way that outsiders, newcomers, or first-timers don't; share that knowledge in respectful and helpful ways. You know where visibilities in town are customarily held or can be most effective. You know the local by-laws regarding lawn signs. You know the major events that take place in the community that would be a good opportunity for candidates to meet voters, or campaigns to have a presence. You know your community because you live in your community, and what you know can help Democratic candidates and campaigns.

Conversely, remember that you're trying to be helpful to the campaign, as opposed to burdensome. Recognize and respect that campaigns in larger-scale districts, or statewide campaigns, will not have the time and resources necessary to tailor everything to each community's particular needs. "Make it local" when you can, but remember and respect that logistics won't always make that possible.

Planning Effective Meetings and Events

Meet Regularly. Meetings serve a number of important purposes. They:

- Enable members and interested Democrats to gather, meet one another, and plan campaign activities.
- Provide a visible presence for the Party in your community .
- Handle routine business matters such as Treasurers' reports, subcommittee reports, the approval of minutes, the election of officers, etc.
- Host guest speakers, and give a forum for Democratic elected officials and candidates to address local Democrats.
- Regular meetings, at set times and locations (posted publicly to social media, websites, community news sources, etc.) provide an opportunity for Democrats looking to get involved for the first time to have a starting place and stop by to learn what you're all about.

Setting a regular, recurring meeting day and time (for example, “the second Monday of the month at 7PM”) can be helpful, as your members will know when to show up without needing to be informed of each date and time, and folks looking to stop by for the first time know better when your meetings will be. Keeping the location consistent is helpful in this regard as well.

The When and the Where. In terms of when, where, and how often to schedule meetings, a few things to keep in mind:

- Your meetings must take place in spaces that are ADA compliant, and open to the public. Even if a building meets ADA standards, avoid spaces that are especially difficult for persons with disabilities to access.
- While you are allowed to hold meetings in publicly-owned buildings, remember that you cannot conduct fundraising activities or collect funds in a publicly owned building (including but not limited to a City or Town hall, public library, or public school). More on this in the Finance chapter (Chapter 6).
- Each community is different, and do what makes the most sense for your members and your community! Some committees meet on weekday evenings in large meeting spaces, while some committees in smaller communities may opt for a Saturday morning in a local coffee shop. Do what works for your people, and your community!
- Generally speaking, do not hold meetings during traditional working hours, too late in the evening, or on holidays. The best times for meetings are after 6PM Monday-Thursday, or during morning and daytime hours on Saturday or Sunday. While you will never find a time that is convenient for everyone (especially if you have a large group), consciously avoid scheduling that excludes entire groups of people.

Notify People. It’s good practice to give people at least a few weeks of notice before a new meeting or event. Between 4 weeks out, and 10 days out, is best. Use your email list and social media to notify your members and supporters of meetings and events. If you have members or regulars who do not have access to or do not utilize computers, smartphones, email, or social media, ensure that those folks receive a phone call. Traditional media sources, such as print newspapers, may be appropriate as well depending on how people in your community consume information. Notices should include the date, time, and location of the meeting, as well as any special guest speakers.

Set an Agenda. Prepare an agenda, and distribute it to members in advance. In setting the agenda, focus on planning work that the committee will do, as well as routine business. **The Chair should keep the meeting focused on the agenda, to make the best use of participants’ time.** Setting aside social time before or after a meeting can be helpful both in allowing participants to get to know one another better, and in keeping your meeting on track by designating a separate time for social, or more relaxed, conversation.

In running your meeting, utilize *Robert's Rules of Order* to handle votes, motions, and discussion or debate on items that come before the committee, however, don't get bogged down in procedural jargon and maneuvering -- *the structure of your committee should not get in the way of your activities*. Strive to create an atmosphere where people feel welcome to contribute

to the discussion. The focus of discussions should be on committee business, not parliamentary procedure.

Be Welcoming! Newcomers will show up at your meetings from time to time (which is what you want!). Be sure to introduce yourself to newcomers, welcome them, and make them feel at home. Take a moment at the top of the agenda to have folks present introduce themselves. Explain who you are as a committee and what you do. Explain or provide background information for newcomers on topics that may be confusing to them (i.e. if planning for your upcoming Caucus is on the agenda, explain to any newcomers what that is!). Remember your committee meetings should be conducted in the open; with the exception of someone who is being disruptive or disrespectful, you should not attempt to close your meetings off to anyone. *If newcomers are not treated well, the committee will never grow!*

Minutes. It is the charge of the committee's Secretary to keep minutes of your committee meetings. In the event of the Secretary's absence, be sure to have someone take minutes in their stead. The minutes do not need to be a verbatim recording of all that is said, but they should provide a reasonable description of what was discussed, and any decisions made. Actions taken by the committee (votes of any kind, or even consensus agreements) should be noted. Subcommittee reports should be briefly summarized. These minutes should be available to all committee members upon request; it is good practice to email out minutes following a meeting, so those unable to attend may have a sense of what occurred.

Special Events. It's good to break up routine business meetings every so often with special events: hosting guest speakers, or even replacing the business meeting with a social gathering.

One model of recruitment that is mentioned several times in this manual is the use of a special social event as a reason to invite "new" Democrats: pull the list of everyone who has newly registered as a Democrat in your community in the recent past, and invite them to a social event (a cookout, "Pub, Pizza, and Politics" at a local restaurant, a potluck, a picnic, or any fun and socially-oriented gathering that makes sense for your community). You can mail them an invitation, call them on the phone, or even knock on their doors as you would during a campaign. Social events can seem more welcoming than regular meetings; some people find the idea of showing up at a meeting without knowing anyone to be intimidating, but they might be more inclined to come to a social gathering. If you engage in this activity every year, and each year invite the "new" Democrats in the community from the past year, eventually you'll have a system in place where each Democrat who moves in or registers in your community receives an invitation from your committee!

In selecting a venue, refer to the next section, "Accessibility" to ensure that the venue you select is accessible and welcoming for all.

Accessibility

As Democratic Party organizations, our town and ward committees should always strive for inclusivity; this includes making sure your meetings and events are accessible to persons with disabilities! Here are some tips and suggestions for doing so, prepared by the Disability Outreach Subcommittee of our Democratic State Committee:

General Ideas:

- Plan ahead for accessible meetings! Budget for accommodations if necessary. You might need a sign language interpreter, assistive listening devices or amplification of the speaker, or media in an alternate format (for example, a copy of the material in large print or Braille). To know if you will need such assistance, make it known that Democrats are welcome to contact you to discuss their needs.
- Include a disability statement on your flyers, and computer or print advertisements. For example, "For Disability related accommodations please contact Jim at 632-XXX-XXXX."
- Include an email address on all of your announcements and materials so that someone with a hearing or verbal disability can make inquiries.
- One person from your committee should be assigned as a contact person to address these questions and concerns.

Selecting Sites and Venues:

- One step can make the location of your event inaccessible.
- Do you know where the nearest handicapped parking spaces are?
- Is the path to the building accessible?
- Is there a specific entry that is accessible?
- Is there a handicapped bathroom in the building? Where is it located? Is there signage for the handicapped bathroom?
- Are the doors wide enough for someone in a wheelchair to get through?
- When you set up the room, are the aisles wide enough for a wheelchair to get through?
- Are there seats or spaces allotted for individuals in wheelchairs or those who need to sit close to the front to lip read, hear, or see?
- Where would someone with a guide dog sit?
- Is there someone assigned to guide an individual to the correct accessible location?
- If the event is outside, is there seating available for people who cannot stand for long periods of time?
- How easy is the terrain to negotiate? Can a person in a power wheelchair or with crutches easily navigate it?
- Are there any physical dangers to a person with a visual impairment?

Virtual/ Remote Meetings and Events:

- Accessibility must be considered in virtual/ remote settings as well. The American Bar Association has published Virtual Meetings: Accessibility Checklist & Best Practices, which includes platform-specific information about making your virtual meetings accessible:

https://www.americanbar.org/groups/diversity/disabilityrights/resources/covid-resources/virtual-meetings-checklist/

Helpful Resources for Disability Access:

- Contact the Massachusetts Commission for the Deaf and Hard of Hearing for information about sign language interpreters: www.mass.gov/mcdhh
- Contact the Perkins Braille and Talking Book Library to learn about materials in large print and/or Braille www.perkins.org.

Please feel free to contact the Disability Outreach Subcommittee if you have any questions. The Subcommittee's leadership is always available to you, and can provide valuable guidance and advice! Their contact information is available online at MassDems.org.

Running a Virtual/ Remote Meeting or Event

Virtual or remote meetings may be necessitated by public health conditions; they also may, from time to time, prove more convenient for members or participants. It is important to conduct any virtual or remote meetings in a way that allows all Democrats to participate.

Online Meetings: Your goal is to create an accessible meeting that encourages individuals to stay home if they feel unwell, are self-quarantining, or have been advised to avoid public gatherings. Some folks will plan on hosting their meeting at a public location but will include a remote participation option. Others may wish to err on the side of caution and plan for an entirely remote meeting.

The Massachusetts Democratic Party defines accessible as referring to those conditions which assure openness and provide an equal opportunity for participation, including locations, convenience and public identification among others. Please keep this in mind as you are selecting a remote participation option. Several options are listed later in this section, along with recommended guidelines for conducting your meeting in an accessible fashion.

Technical difficulties and learning opportunities are sure to present themselves. It's important that you set expectations with your committee.

Giving Notice: Just as you would with an in-person meeting or event, remember always to give appropriate notice. In addition to emails, call members without an email address on file and consider calling all members to provide them with the remote participation link as well. In your message to your members, include a direct link to register. Ideally, the registration link would also have a calendaring function to enable registrants to add the event directly to their electronic calendar. On public notices of the meeting, publish the name and contact information for a responsible and responsive point of contact to provide dial-in information.

Selecting the Right Platform: There are many conferencing options available. Several are listed later in this section; state party staff are happy to provide additional technical assistance to

local committee Chairs and leaders as needed. **Ensure that any conferencing software you use allows for both phone and computer/ mobile device participation.** All attendees should be able to listen, speak, and vote (as needed) through both the phone and computer options.

Furthermore, ensure that your software requires folks to register by name. This will help you manage callers during your meeting. If, for any reason, someone is registered without their name, registered by phone number or registered by nickname, confirm their name and write down their name and corresponding conference identification for your attendance record and meeting process.

Ensure that your tool allows the host to mute and unmute participants. Ideally, your tool will also allow you to record. It may have a chat function-- if so, you should use as necessary, but not depend on it for voting purposes because it may preclude telephone participation. If a vote is necessary in your meeting, and there are telephone participants, either conduct a verbal roll-call vote, or otherwise establish a means for email or telephone-based voting.

Accessibility: Accessibility must be considered in virtual/ remote settings as well. The American Bar Association has published *Virtual Meetings: Accessibility Checklist & Best Practices*, which includes platform-specific information about making your virtual meetings accessible: https://www.americanbar.org/groups/diversity/disabilityrights/resources/covid-resources/virtual-meetings-checklist/

Before Your Meeting or Event: Communicate your meeting rules, meeting agenda, and virtual participation processes beforehand. If applicable, let people know that you will be taking votes by roll call, so it's important they register by name and announce themselves so you have them on the roll. Instruct them about how to ask questions and ask them to mute their phones otherwise.

Test your chosen software and ensure that you are comfortable using it. Ask members to join you beforehand to test it with multiple people on the line. This will help you see if the registration process is easy and understandable. Practice muting and unmuting participants and do a dry run of your agenda. Practice taking votes and see if there are issues with connectivity, muting or otherwise so you can troubleshoot, or select a different tool as needed.

Organize volunteers to help with the process, just like you'd do at a normal meeting. So the Chairperson can focus, delegate two volunteers who are physically with, or have a direct line to, the chair to assist with the operations of the call, member management, and technical difficulties. The Chair should be free to conduct the business of the meeting directly. Ideally, one volunteer should be the same person whose phone number is listed in the public posting in case individuals have issues joining. By having two tech volunteers, one can be on the phone assisting participants while the other is managing members on the call. Introduce the volunteers at the start of the call and offer their phone number in case the call becomes disconnected.

The volunteer managing members should mute disruptive lines and communicate with the caller that they've been muted (in case they intend to participate later), mute all callers when necessary and unmute all callers if there is an open period. They can also maintain your roll and track votes during the balloting process to ensure an accurate record.

During the Meeting/ Event: Ask all participants to mute themselves, or mute all participants yourself. Ensure there is a way for callers to unmute themselves in case they need to raise a point during the meeting. As with in-person meetings, the Chair may ask disruptive participants to leave, and if needed they may be disconnected by the tech manager.

Begin the call by asking participants to self-mute, and explaining the process of the call. Explain the agenda and how you will be taking votes and questions. Offer the phone number of your tech volunteer. Ask for any clarifying questions before you begin. Be sure to enable the transcription/ closed captioning feature of your platform.

All important information should be stated slowly, clearly, and repeated. Questions asked should be repeated by the Chair to ensure it was accurately understood by the Chair and participants. All votes should be repeated back fully with the voters name and their vote.

Post-Meeting/Event: Be sure to end your call reiterating the number for your tech volunteer so people who may have had issues can report them. Follow up with an email and/or calls to your membership to reconfirm the results and receive feedback.

Software/ Tools:

1. Zoom
MassDems staff are happy to provide guidance and assistance in learning to access and set up Zoom.

You will need to distribute Zoom access information to your committee as well as step-by-step instructions for users joining via phone or video.

Users should be asked to mute their phone when they are not speaking and can unmute when they would like to participate.

Zoom information:

- Free version for up to 100 participants
- Paid versions with larger capacities are available at reasonable pricing
- Administered on computer through an app that is downloaded (participants may dial in, join by computer, or join by app downloaded on mobile device)
- Administers may also download app to your mobile device or tablet
- Register participants ahead of time through email or calendar invite
- Option to record

2.Google Hangouts (recommended for small meetings)

- Free version for up to 25 participants (If you have access to GSuite you can have 50-100 users)
- Uses a Gmail account to set up
- Download app to your mobile device or tablet (participants may dial in or join by computer)
- No pre-registration but you can invite participants ahead of time through email or calendar invite. You will be able to see who accepted the calendar invitation.

Google Hangout Instructions: Google Hangouts from Google

3.GoToMeeting

- Free Trial version available for 14 days; paid subscription thereafter
- Administered on computer through an app that is downloaded (participants may dial in, join by computer, or join by app downloaded on mobile device)
- No pre-registration but you can invite participants ahead of time through email or calendar invite. You will be able to see who accepted the calendar invitation.
- Option to record

GoToMeeting Instructions: GoToMeeting

Issue Activism

While the committee as a group may choose to work on or highlight particular Democratic issues, remind your participants that no one should limit their activism to the committee alone! Encourage all of your members, volunteers, and newly interested persons to be engaged citizens outside of committee activities as well. Issue-oriented activities to encourage your members to engage in (or to undertake as a committee) include:

- Contact their legislators on issues that matter to them. Send out links to contact information for Legislators. Offer to pass along calls to action on important legislative matters for progressive causes.
- Contact other legislators: flooding other legislators with calls can sometimes be helpful. Both branches of the U.S. Congress have online web portals for interested persons to obtain their office contact information; distribute this to your committee.
- Contact friends and relatives represented by Republicans. It is always more effective for a legislator to hear from their own constituents. Encourage folks to reach out through their networks and get people in other areas to contact their legislators.
- Register as a Democrat. Many new folks interested in getting involved will not be registered Democrats. Encourage them to do so; this is no time for fence-sitting!
- Organize a legislative forum and/or potluck meeting to give legislators the chance to discuss issues they're working on, and committee members and participants the chance to ask questions and advocate on issues of importance to them.

Issue activism is important. However, it is important to remember that the common thread of our committees is that we are Democrats; ***there may be disagreement on certain issues, which is okay!*** We are a big-tent party. Remember that issue-focused advocacy should never take the place of the broader work of electing Democrats.

Inviting an expert or activist on a particular issue to come address the committee is a great way to draw in others from the community who may be passionate about that issue or cause. Be sure to publicize such speaking engagements -- more on that in the Communications chapter!

Chapter Three: Recruitment And Outreach

If your committee is newer, or coming off of a period of inactivity, your first task will be to identify those Democratic activists willing to put in the time and work along with you to help elect Democrats to office. If your committee is more established, strive to be a well-oiled machine that reaches out, at some point, to each voter who newly registers as a Democrat in your community -- whether they've just moved in, or have recently changed their registration to Democrat (those people are great recruitment targets, by the way -- something has motivated them to switch their registration our way!).

Some basics on recruitment:

There is only one way to get new volunteers to join your efforts: ASK! Always remember one of Tip O'Neill's golden rules of politics: you must ask. Don't be passive; you cannot expect people to simply gravitate towards your committee. People like to be asked, and they like to be invited.

Remember that the worst thing your committee can do is nothing. It's okay if your efforts aren't as successful if you'd like, but it's NOT okay to avoid trying! If you're hoping for a recruitment effort to yield 10 new recruits, and you only land 1, that's not failure -- *that's one new Democratic activist in your town or ward instead of no new activists!*

Recruitment

How do you bring more Democrats in your community into the fold? How do you grow the ranks of your committee?

The culture you create matters. Before we get into how to recruit Democrats to your committee to grow its size and effectiveness, let's review for a minute what you can do to *keep* those folks involved and active once you've got them:

- Respect, kindness, and making people feel welcome -- these things matter. As Chair, work actively to discourage infighting of a personal nature, including clique-ishness. People will not stay involved in an organization where others are rude to them, or disrespectful. Sometimes longstanding members may be reluctant to fully welcome newcomers; if that is the prevailing attitude, then new people simply won't join. Conversely, newcomers may sometimes fail to appreciate (or even be aware of) the work that your longtime members have done in the past, or do behind the scenes. Create social opportunities for your members and recruits as needed to help people get to know one another. Take time to introduce people. Disagreements happen often in politics (especially in a big-tent party like ours), and that's fine, but make sure disagreements are political -- and not personal -- in nature; humor and optimistic attitudes help!

- Keep the focus on electing Democrats, and make sure you're regularly providing meaningful opportunities to work on Democratic campaigns. **If your committee does nothing other than hold meetings, activists who want to make a difference aren't going to keep coming.** You must have a program that is worth their time; meetings are not a program unto themselves.

Start with who you've got, or recently had. Collect and review the records for your committee over the past decade or so: membership rosters, phone trees, formal filings and paperwork that list members and associate members. Connect with anyone who is still living in the community, who maybe hasn't engaged for a while, and invite them back into the fold. People step away from involvement for different reasons, but sometimes they fall off because of a lack of outreach. Sometimes, they may have been at odds with a previous Chair. Let bygones be bygones; we need every Democrat we can get to be involved! As noted previously, you as Chair are working hard to keep a culture that limits personal infighting unrelated to committee business; those who may not have felt welcome in the past, should feel welcome under your leadership.

There are a number of sources for records of previous committee members: ask former or current officers of your committee to pull any records they may have. Visit your City or Town Clerk's office and ask to view the committee's re-organization filings over the years, which include membership listings. Review results from past Democratic Presidential Primary elections in your community to see who has been elected to your committee in the previous few cycles. If these people have stopped coming, invite them back.

Reach out to folks who volunteer on campaigns in town. The best source of people to recruit for your committee are those Democrats living in your community who have a recent history of volunteering for Democratic campaigns in the area. Make a list of folks from the community you've volunteered with yourself. Ask Democratic elected officials from your area, or their campaign staff, for volunteer lists from your community. Reach out to these people personally and extend an invitation. Invite yourself to other progressive or social justice groups' meetings (such as Indivisible or Our Revolution); reach out to local leaders of groups that have organized marches. Introduce yourself to the local union representatives. Let these activists know your committee exists.

Pulling a voter list for more general recruitment. More on how to pull a voter list later (including what information about specific voters is available, and how to obtain it), but in short, you have the capacity to access lists of registered Democrats in your community, as well as information about how often they've voted, and whether they regularly vote in Democratic primaries, to help assess how committed they are to the Party. Use this information strategically to let solid Democrats in your community know that they can get involved with your committee!

Get to Democrats as they come into your community, or as they register as Democrats for the first time. Consider a program to reach out to Democrats as they move into your community, or as they re-register as Democrats for the first time. This is yet another way you can use voter lists and databases to grow your group.

Doing this regularly ensures that Democrats who come into your community know about your committee, and have had someone reach out to them. Think of what it's like to move into a new place -- wouldn't you want to be welcomed? And wouldn't you be impressed with that level of organization? Think of the voter who has recently changed their registration to Democrat -- obviously, something has compelled them to do that; they may be chomping at the bit to get further involved. Even if these folks don't chose to get involved right away, now they know your committee exists, and may opt to get involved in the future.

One model of recruitment that is mentioned several times in this manual is the use of a special social event as a reason to invite "new" Democrats: pull the list of everyone who has newly registered as a Democrat in your community in the recent past, and invite them to a social event (a cookout, "Pub, Pizza, and Politics" at a local restaurant, a potluck, a picnic, or any fun and socially-oriented gathering that makes sense for your community). You can mail them an invitation, call them on the phone, or even knock on their doors as you would during a campaign. Social events can seem more welcoming than regular meetings; some people find the idea of showing up at a meeting without knowing anyone to be intimidating, but they might be more inclined to come to a social gathering. If you engage in this activity every year, and each year invite the "new" Democrats in the community from the past year, eventually you'll have a system in place where each Democrat who moves in or registers in your community receives an invitation from your committee!

Using VoteBuilder, Voter Lists, and Data

If you're an old hand with voter targeting, VoteBuilder, VAN, or similar programs, feel free to skip this section. But if those are terms you've heard before and you're not really sure what they're about, or if this is an alien language to you, here's some basic background:

We all know that our votes -- meaning the specific options we chose on our ballots, when we're inside our polling place -- are private. There are no records of how individuals have voted on a particular ballot, anywhere. However, what is less commonly known is the extent of voter information that *is* public. Using this information in a responsible and informed manner helps campaigns and parties to reach out to their supporters, connect with persuadable or "swing" voters, and steer clear of those who will never be on your side to avoid wasting time and resources.

So what information about a specific voter IS public and available?

- Full name and address
- Telephone number, if provided on a voter registration form
- Date of birth
- Gender identity
- Party registration
- ***What elections they have voted in***

That last point is key: though *how* you vote in an election is private, *whether or not you've voted* is public information. Also, for primary elections, which party's ballot you chose is public information; for unenrolled voters, which party primaries they've voted in can be a clue as to which party they identify with more closely.

Campaigns regularly use this information to determine which voters are most likely to be receptive to their message, and to target with canvassing, phoning, direct mail, digital advertising, or other forms of outreach. While the best campaigns have inspiring messages with broad appeal, successful campaigns are the management of three precious resources (time, volunteers, and money), none of which exist in sufficient quantity to reach every voter; thus, some targeting is necessary.

You, too, can use this approach in recruiting new Democratic activists to your committee. Who might be "hot prospects" for you to target for recruitment?

- Perfect voting Democrats! Registered Democrats who live in your community, who vote in every election, including municipal and special elections: these folks represent the most engaged Democratic voters, and they pay attention. See if they're interested in taking the next step and getting involved.
- Folks in your community who have changed their registration to "Democrat" since the last election! Voters do not tend to change their party registration frequently; someone who recently changed their registration to Democrat feels strongly about their support of our party **right now**, and the time is ripe to get them involved! Something has recently motivated them to make that change; the time is right to approach them.

These are just some basic examples; using VoteBuilder, you can pull very specific voter lists like this with just a few clicks, and then generate mailing labels, telephone lists for phone calls, or canvassing materials!

VoteBuilder. Now that you've got a general sense of what voter information is available to you, here's how you can get at it and make it work for your committee!

VoteBuilder is a software product, produced by the Massachusetts-based company NGP VAN. It is a web-based voter database system that enables users to look up individual voters, create lists of voters based on criteria ranging from the very simple ("All registered Democrats in Millbury") to the very complex ("All registered Democrats in Millbury between the ages of 60 and 85, who voted in the 2012 and 2016 elections, but did not vote in 2014"), and *track* interactions with voters (I.e. record who was contacted, how, and what their response was).

While there are other voter database products, ***VoteBuilder is free for use by your committee, courtesy of the State Democratic Party and the Democratic National Committee!*** On the commercial market, such voter database technologies are often very expensive.

To get started:

- Call the State Party office to arrange to have an account created for your committee, 617-939-0800.
- Arrange a training session for yourself, and any officers of your committee who will be helping you out. State Party staff are always happy to arrange training sessions!
- Limit the number of officers or committee members, however, who will have direct access to your committee's account; VoteBuilder contains proprietary information.

Tracking Contacts with Voters. VoteBuilder is used for more than just generating targeted voter lists; it is a database that can be used to keep records of contacts you've had with specific voters. Your training from State Party staff will cover how specifically this can be done.

City and Town Clerk's Offices. Voter information can also be obtained directly from your City or Town Clerk's office. While in essence this is the same information that you would obtain through VoteBuilder, note that these requests sometimes come with a fee, must be specific in nature, and the format of the results will be less user-friendly (voter files from a Clerk's office are usually in the form of a .csv file, which can be opened as a spreadsheet).

Welcoming New People

We know that being friendly and welcoming is important when greeting newcomers. It's also important to keep in mind that folks looking to get involved for the first time are not going to know many of the ins-and-outs of politics and organizing. Things a new activist may not know include:

- What a town or ward committee actually does
- What the rules for membership are (including that a person can get involved without being a full member)
- Who local leaders are
- What a caucus is, what a convention is, what role these events play in the party

They may not even have realized that a local party organization existed. **Take the time to explain things** to new folks in a way that is informative, without being patronizing or dismissive. **Remember to be patient and courteous**; you want them to join your ranks, not feel like you're running an exclusive establishment into which they are not welcome.

Party organizing is alien to most people, and new activists may not know about the party structure beyond what they hear on the news or see on social media (much of which is negative). Explain that you are a local committee, made up of interested, active, and engaged local residents. Emphasize that while there are some rules regarding full voting membership, your doors are not closed to anyone. The best way to combat suspicion about party organizations is to ***create a welcoming, open atmosphere, where participants have opportunities to make a difference and do something important by being involved*.**

Diversity Outreach

Our Charter states: *"The Democratic Party of Massachusetts, to encourage full participation by all segments of the population, shall conduct affirmative action and outreach programs on behalf of marginalized communities including but are not limited to underrepresented ethnic and racial groups, persons with disabilities, LGBTQ+ individuals workers, youth, low and moderate income people, women, and senior citizens. Democratic Party organizations shall undertake affirmative action programs designed to encourage the fullest participation of all Democrats in all Party activities at all levels including leadership. These activities shall include but not limited to the processes in which delegates are selected to the State and National Democratic Conventions; elected or appointed Party officials; Party policy, platforms, and rules are formulated; and regular programs of voter registration, public education and public relations.*

Respecting our diversity, and appreciating how our different backgrounds and traditions enhance and enrich our society, are core Democratic values. **It is important that our local committees reflect the communities we serve, represent, and in which we campaign**. Outreach to diverse communities should be an active goal of each town, and ward committee.

More from our State Party's Charter:
The goals of affirmative action and outreach shall be:
1. to institute those at all levels and in all units of the Party which will provide:
    a. target group members with an understanding of the methods and procedures for participating in all elections and programs of the Democratic Party, and
    b. an opportunity to participate in all elections and programs of the Democratic Party
2. to elect target group members to all levels and units of the Democratic Party according to parity of enrolled Democrats in a voting area, through a formula compatible with United States Census data
3. this goal shall not be accomplished either directly or indirectly by the state Democratic Party's imposition of mandatory quota at any level of the delegate selection process or in any other Party affairs, as defined in the By-Laws of the Democratic National Committee and the Democratic State Committee.

Your committee should have an officer designated as your Affirmative Action and Outreach Advisor, who will take the lead on encouraging full participation by all segments of the population, with emphasis on such target groups as Blacks, Hispanics, Asian-Americans, Native Americans, LGBT+, military veterans, persons with disabilities, youth, and others as appropriate. Your committee may also want to consider creating a subcommittee to support this work.

As your committee considers its approach to connecting with diverse communities, consider:

- **Be proactive, not passive.** Don't expect marginalized communities to automatically gravitate towards the party. Don't ignore communities that haven't engaged with the party by assuming they never will. You must reach out to communities not reflected in your committee, and extend an invitation. It's on us to open our doors and be welcoming.

Certain communities may feel excluded from the political process or ignored by policy makers; it is our job to express that "The Democratic Party Wants You!"

- **Reach out to community groups or leaders and extend invitations.** Are there civic, religious, or cultural organizations that connect or represent communities or neighborhoods? Does your committee have a contact within the leadership of those organizations? Does your committee have a presence at their events and gatherings, where appropriate? Have you invited representatives of these organizations to address your committee about a topic or topics of import to them? Your committee's officers should have relationships with leaders of such groups; if you don't, reach out!
- **Local media.** Are there newspapers, radio stations, magazines, online forums, or social media pages that serve particular communities in your area? In particular, are there publications in other languages aimed at local readers for whom English is a second language? Make sure you include these publications in your local media outreach: send or post notices of your meetings, caucuses, forums, and events here.
- **Communicate with people the way they are comfortable communicating.** Keep in mind that different people prefer to receive information in different ways. In considering how your committee communicates, consider language, platform, media, and method -- be open to the possibility that your committee's traditional means of communicating with members and the public may not be reaching the full audience you want, and consider other approaches.
- **Language diversity.** Do members of your committee speak more than one language? Do you have committee members who could serve as a liaison or welcoming point of contact for folks who speak a language other than English at home? If your committee has a website, is there an option to display its contents in another language or languages, which are commonly spoken in your community?
- **Information on voter participation.** A potential barrier to participation for any group of voters can be a lack of information about the timing of elections, the role of various elected officials, or where the parties stand. Massachusetts is unusual in how many functions of government are carried out at the local level. Your committee should consider preparing, or otherwise know how to access, informational materials explaining procedures for registering to vote and casting a ballot, completing a municipal census (failure to do so can result in a voter being marked "Inactive"), the timing of your local elections, and the roles of your various elective offices. Make these materials available in other languages as appropriate.
- **Our message as Democrats.** You and your committee members should be prepared to talk about what makes you a passionate Democrat! Communities that have felt marginalized, or are new to the political process, will not feel an obligation to one party or another. You have to be prepared to talk about why electing Democrats matters.
- **Accessibility.** Are your meetings, events, and activities accessible for persons with disabilities? Refer to the section on Accessibility in Chapter Two for more on this topic.

The Best Practices Institute (BPI), the shared training department of the Democratic National Committee (DNC) and the Association of State Democratic Committees (ASDC), has developed

more detailed resources for conducting outreach to specific, historically marginalized communities. Reach out to MassDems staff to explore these resources.

Working With Progressive Groups

Communicate regularly with progressive groups that either already exist or may have sprung up in your community, such as Our Revolution or Indivisible, or social justice groups. Attend their meetings; encourage members of progressive groups to attend Democratic meetings. These groups are not competing. Look for synergies. Work cooperatively. This is not about co-opting other groups but looking for cooperation. Support the work of other groups and they will be more likely to support you. Your experience is a resource to them, and vice versa.

Chapter Four: Communications

Our party's success depends in large part on Democrats spreading our message far and wide. Consider having a Communications Subcommittee, or designating a member or officer to lead communications initiatives. In the absence of such assignments, the Chairperson should assume responsibility for communications. Monitor the State Party's email newsletter, press releases (available online at MassDems.org), and social media for messaging that your local committee can emulate and reinforce.

Websites

Having a website is a great way to have basic information about your committee publicly available for anyone who is trying to seek you out. There are a number of options and platforms available to develop a website that is low-cost, which are user-friendly (i.e., can be maintained and updated by someone who does not have an expertise in web development). You may also have a committee member or volunteer with an IT or web development background who is able to offer their services. User-friendly platforms like Squarespace or WordPress are available for low costs; explore your options before committing to a platform. The person or people responsible for maintaining the committee's website should be involved in selecting the platform, as they will have to manage it.

Some "rules" to keep in mind when developing a website:

- Keep it "clean:" keep the site visibly inviting by focusing on a few images and clear, simple text; avoid clutter, and avoid overloading visitors with unnecessary text or graphics.
- Select a platform that enables translation of the website's content into other languages.
- Enable screen reader technology for website users who may be visually impaired. Use alt text on images; screen readers read the alt text to give a visual description of what the image on the screen is meant to represent.
- Keep it CURRENT: nothing says "defunct" like a website that hasn't been updated in three years. Make sure posted information on meeting and event dates, as well as officers and contact information, is updated regularly.
- Have a mechanism on the website for people to reach out to you: whether this is an automated sign-up form that connects directly to a database or email system, or simply listing an email address and telephone number for the Chair and/or other officers, make sure people visiting the site are provided with a means to reach you.
- Explain the basics of who your committee is, and what you do. No need to go into copious detail, but imagine someone asking the question "So my local Democratic committee...I wonder what they actually do, I'm going to visit their website." Make sure that person feels like that question has been addressed once they've visited your site, and that they have a sense of how they can get further involved!

Here are suggestions for more specific pages for your site:

- *About Us:* Explain what your committee does, discuss the history of your committee, its leadership, and other organizational information (keep it simple!)
- *Events:* List your upcoming events and regular meeting schedule, and any events organized by other Democratic organizations or campaigns that may be of interest
- *Contact Us:* Make it easy for members or potential supporters to get in touch by providing contact information
- *Member List:* A first-time visitor may know someone on your committee, and that may make them feel more comfortable getting involved. Include a note that full voting membership isn't required to attend meetings or take part in activities!
- *Press:* Have you made the news (or at least written press releases)? Include links or text!
- *Resources/Links:* Share a list of resources of interest to your members like voting information (including where to register to vote online), elected officials' pages, as well as the state and national party.

Passwords & Access: More than one person should have access (username and password) information for your website, just in case! While one person may be designated to manage and update the site, it is good practice that 2-3 responsible individuals, including the Chair, should be able to access the necessary accounts if needed. As part of your transition process when new officers are elected, or new persons chosen for relevant roles, be sure to include passing along usernames and passwords and/ or changing them as necessary.

Social Media

Social media has become the major source of information, news, and connectivity for most American adults. People will often search a social media platform to find an organization before looking for its website on a traditional search engine. Having a social media presence for your committee is important, but just as important is to keep that social media presence updated and current! Nothing says "defunct" like a Facebook page that hasn't been updated in over a year!

If you have a social media presence, have current contact information and upcoming meetings posted. Also, post regularly to keep people engaged! Sharing posts from your member of Congress or our U.S. Senators, and other elected Democrats, is a great way to do this.

If you do not have a social media presence, set one up, or find a committee member willing to take this on. This is also a great potential project for a newly-involved person.

Which social media platform(s) should you use? Facebook, Twitter, Instagram? *The answer to this question is different for every community.* Survey your own people to see which platforms they use most commonly, and which their friends and neighbors are using most. ***You don't need to be on every platform -- focus on those that folks in your community prefer to use.***

Remember that anything that appears to be a post from your committee itself should be considered as if it were a formal statement; in other words, do not post content that is

inappropriate or offensive, or anything that you wouldn't want to be seen as representing your committee. If you wouldn't say it aloud on the Town Common or at the T station, don't post it to social media!

Passwords & Access: More than one person should have access to your committee's social media accounts, just in case! For some platforms, this means a username and password; for Facebook, it means more than one person being designated as a page "Administrator." While one person may be designated to manage the committee's social media presence, it is good practice that 2-3 responsible individuals, including the Chair, should be able to access the necessary accounts if needed. As part of your transition process when new officers are elected, or new persons chosen for relevant roles, be sure to include passing along usernames and passwords and/ or changing them as necessary.

Email Communications

Have an email system in place to send out information on meetings, activities, and events. Include people who are interested, whether or not they are full members. For smaller groups, copying/pasting email addresses to send messages out may be fine. Yahoo Groups and Google Groups work well and encourage interaction. MailChimp handles larger lists and is free up to 2,000 e-mail addresses.

Don't restrict access to email updates from your committee to full voting members only; open it to interested persons. You may have Democrats in your community who eschew regular meetings, but are more than happy to come to a canvass or visibility if someone tells them about it.

Do not ever put anything into an email that you expect to remain private, or that you would be embarrassed to find printed in your local newspaper. Even if you restrict your email communications to full voting members, people forward emails to others all the time without thinking. Every time an email communication goes out from your committee, assume it will be seen by a wide audience. The same rule from Social Media applies: if you wouldn't say it aloud on the Town Common or at the T station, don't put it in an email.

Passwords & Access: More than one person should have access to your email list and/ or distribution system, just in case! This may mean more than one person having the username and password to your email distribution system, or more than one person having a copy of the list of individual email addresses. While one person may be designated to handle email communications, it is good practice that 2-3 responsible individuals, including the Chair, should be able to access the necessary accounts or email addresses if needed. As part of your transition process when new officers are elected, or new persons chosen for relevant roles, be sure to include passing along usernames and passwords (and/ or email lists) and/ or changing usernames and passwords as necessary.

Outreach to the News Media

“Traditional” media such as newspapers and radio still have their place, especially in communities with vibrant local newspapers or news sites. Create a list of local media that is regularly read, viewed, watched, or listened to by residents of your town or ward. Contact them to introduce yourself, and to inquire about the best way to send in information or media releases: get the name of a reporter or editor, an email address, a telephone number, and print deadlines (so you’ll know when information needs to be submitted).

Press Releases. Sending a press release is easy, and a great way to get your meetings or events out to the public. Local papers in particular, who have had to cut down reporting staff, are often hungry for additional content. Larger papers will not always run a press release, but local and community-focused media outlets are often eager. *Several sample press releases are included in the Appendix of this manual.*

Even a routine meeting of your town committee can make for an interesting press release if it includes a special discussion on an important topic such as local environmental efforts, a new member reception, a voter registration night, or a food drive. In addition, having a speaker at your meeting, electing new members, awarding a scholarship, recognizing members who have served twenty years, are all good topics for press releases. Other great opportunities for publicity include the annual caucus, election of officers, a meeting of delegates, attending the convention, and more.

Press releases should include the name of your organization, as well as the name, telephone number, and email address of a designated contact person or spokesperson (this can be you as Chair, or a volunteer from the committee; whomever it is, it should be understood that they must have authority to speak on behalf of the committee). The release itself should be written as if it were a news article; it should be concise, clear, objective; something a local paper could simply run as an article if that is most convenient. That means it should be focused on the Who, What, When, Where, and Why of what you’re announcing; opinions and subjective statements should be made as part of quotes. If you can, include an appropriate photo, appropriately cropped with resolution suitable for publication. Local media appreciate quotes and photos.

Some print newspapers also have “Community Calendar”-type features, where information about meetings and events can be posted. This is often one of the most-read sections of a local newspaper.

Consider a “Press Release Calendar!” If you have the events and capacity to do so, get at least one press release out each month. A press release can be done in as little as 10 minutes, and may often be keyed to the meeting of your committee. Don’t feel that you have to do it all; two or three a year is a huge step. Here’s an outline of a potential Press Release calendar:

Summer	Anytown Democrats Seek New Members
	Anytown Democratic Committee Elects New Members
Fall	Anytown Democrats Attend State Convention

	Anytown Democrats Hold Voter Registration Drive
	State Representative X to Address Anytown Voters
	Anytown Democrats Conduct Food Drive
Winter	Anytown Democrats Host Holiday Party
	Anytown Democrats to Elect Delegates to Convention
	Anytown Democrats Elect Delegates to Convention
Spring	Anytown Democrats Elect Officers
	Anytown Democrats Work to Protect the Environment

Remember, your Democratic committee is news!

Letters to the Editor

Letters to the Editor are a great way to allow members and supporters of your committee to express their views on candidates and issues, and to spread the party's message directly to the public. Messages are more effective from neighbors and local residents than distant strangers. Have a volunteer from the committee coordinate sending in letters; they should contact your local and regional media outlets to find out what their guidelines are (maximum number of words, how letters should be submitted, deadlines to print in advance of Election Day), and recruit committee members and supporters to write the letters. Spread your letters out among publications, and stagger them out so that they run regularly in the lead-up to an election or other important event.

Brochures

Some committees opt to produce a printed brochure that can be distributed, containing information about the committee and how to get involved. A brochure is very useful for many reasons: it can be given out at events sponsored or attended by the committee, and it can be provided to folks looking for a more basic background. *Sample brochures are included as Appendix G.*

Local Events

Go where the people are! If your community or neighborhood has events where local organizations often have a presence, make sure your committee is represented there! Whether it's an annual Fall or Summer festival, parade, or Winter Carnival, if political organizations are permitted to have representation, be sure your committee takes part! Your table, if the event is a fair or expo, can feature your brochure, cards or slips with your contact and meeting information on them, email and volunteer sign up sheets, and materials and literature for Democratic candidates.

Keep in mind that not all events are appropriate for partisan or campaign-related activities. Memorial Day observances, for example, are not appropriate for campaigning. Talk to neighbors

or ask event organizers about customs or traditions; your goal is a friendly introduction to folks in your community, not an inappropriate intrusion.

The Phone Tree

What if your communications objective is more focused -- reaching out to members about a special event, or recruiting volunteers for a campaign activity? The Phone Tree is a tried-and-true method worth exploring for your committee. Nothing Says “I Love You” Like a phone call! Phone Trees can help build a sense of community in your group; you can use email to communicate with a lot of people, but a personal phone call increases the effectiveness of your communication by a full order of magnitude.

In addition to effectively conveying the message that your organization thinks an issue, meeting, or event is important enough to make a call, *you build community when your members and volunteers talk with each other!*

No matter how you structure the tree, the essential idea is to reach people by phone to invite them to an event or otherwise make a notification:

- You need an administrator committed to maintaining a list and making sure that calls go out. The administrator should take responsibility for making sure the contact list is current, with accurate phone numbers. This is a role the committee’s Secretary may consider taking on; if another volunteer takes on the task, ensure that they work with the Secretary so that both have current lists of contact information.
- You need team leaders who are ready to call the people to whom they are assigned.
- The Chair (you!) determines when the phone tree is utilized. Once that decision is made, the administrator sends out an e-mail to each of the team leaders. The team leader then calls the people on the list by the deadline listed.
- Each team leader should be assigned five to ten calls. The idea is that you want to encourage chatty communication, as well as disseminating information. Like in so many efforts, you need to balance how many people you want to manage. The more effective you are in getting people to take on smaller tasks, the stronger your team will be.

With this structure, if a committee has thirty people, then five people can be team leaders, each calling five people. Choose the most reliable and friendliest people to be team leaders. In this example, six reliable, committed people reach the whole group.

Chapter Five: Finance 101

The Basics of Campaign Finance Law & Regulation

IMPORTANT NOTE BEFORE YOU GO FURTHER: The purpose of this chapter is to offer basic, introductory information for committee Chairs and officers regarding campaign finance. ***This document should not be construed as legal advice***, and readers should understand that the Massachusetts Office of Campaign and Political Finance (OCPF) is the final authority in the Commonwealth on campaign finance matters, not this guide or the State Party. Laws and regulations may change; for the most current information, visit OCPF online at www.OCPF.us or call (617) 979-8300.

The core concept: political party committees are political entities, and are regulated as such! *Regarding finances, you fall under (mostly) the same rules and restrictions that campaigns and candidates do!* You are operating under different, and sometimes stricter, rules than other "community" groups, such as PTOs or churches, which are just non-profits -- not political groups. You're regulated more like candidates and campaigns. This means, in short:

- You are required to report all income and expenses at least once each year, and sometimes more often, to the Office of Campaign and Political Finance, or OCPF (more on that later)
- There are limits on how much people can donate, and who can donate (no corporations or business entities)
- You can't raise money in public buildings (town or state owned, including public schools and libraries), and public employees can't raise any money for you
- Your committee **must** have and use its own bank account -- you cannot conduct your finances in cash only, and you cannot use anyone's personal bank account!

OCPF: Office of Campaign and Political Finance

Your Democratic Town or Ward Committee's financial activity is governed by Massachusetts General Law, under the auspices of the "Office of Campaign and Political Finance" (OCPF). OCPF provides informational materials on campaign finance for town and ward Committees. ***Chairs and Treasurers should review this information!***

OCPF also offers periodic trainings for committee Treasurers at locations around the state, virtually, and regularly at OCPF's main offices in Boston; information on these trainings are available on their website. New Chairs and Treasurers should make a point of attending or participating in one of these sessions.

OCPF staff are very helpful; if you have a question about anything finance related ***before you do it*** (i.e. a question about whether or not a particular type of fundraiser is allowable, ***before*** you organize it), you can call OCPF at (617) 979-8300 and ask for guidance regarding laws and regulations. Their staff are very helpful! However, you must make inquiries ***before*** you go ahead

and do something; if you notify OCPF after, and you've broken the rules already, they are required to take enforcement action. When in doubt, ask FIRST!

The Rules At-A-Glance

- A political party committee may make expenditures only for the enhancement of the principle for which the committee was organized (e.g., the advancement of the particular party and its candidates -- not for someone's personal needs).
- An expenditure for any amount exceeding $50 must be made by check (or electronic payment, like ActBlue).
- Your committee **must** have and use its own bank account -- you cannot conduct your finances in cash only, and you cannot run your funds through someone's personal bank account.
- **A public employee cannot be Treasurer of a party committee, or raise money for the committee.** State law prohibits anyone employed for compensation by agencies of the Commonwealth, its cities, towns and counties, other than an elected official, from directly or indirectly soliciting or receiving a contribution or anything of value for any political purpose.
- Business or professional corporations, partnerships, limited liability companies and limited liability partnerships are **prohibited** from contributing to your committee.
- A political committee may not hold a raffle as a means of fundraising.
- Meetings in public buildings are allowed under specific circumstances, but **NO political fundraising** can take place in any building occupied for a state, county or municipal purpose (including but not limited to public schools, senior centers, town or city halls, and libraries). That includes **committee dues, fundraisers, or contributions to any candidates or committees. Fundraisers cannot be planned or held in public buildings.** When in doubt about whether or not something can be done in a public building -- DON'T!
- Complete information on every donation to your committee, including the date of the donation, name and address of the donor, and amount given must be kept by the committee regardless of the amount of the contribution. If someone gives the committee $200 or more in a single year, you'll need their occupation (job title) and employer name as well ("Retired" and "Not Employed" should be used for retirees or persons who are not currently employed, respectively).
- Your committee cannot accept cash donations of more than $50 from any individual over the course of a year; donations that exceed $50 must be made by check or electronic means.
- Proper documentation (a receipt or invoice) must be maintained by the committee Treasurer for all expenditures, regardless of amount. Treasurers of all political committees organized in Massachusetts are required by law to preserve detailed accounts, vouchers, and receipts for six years from the date of the relevant election.

Spending

The easiest way for your committee to pay for things is by writing a check from the committee's account, paying via electronic check from the committee's account, or otherwise utilizing a debit card connected with the committee's account.

- You should **not** withdraw cash from the account; you cannot use or distribute cash as a means of paying committee expenses.
- The Treasurer should keep a receipt or invoice for each expense.
- Reimbursements: it is acceptable for an individual to pay for something out of their own funds on the committee's behalf, and for the committee to reimburse that person by check. The Treasurer should get a receipt or invoice from the person being reimbursed. There is a separate section on your Campaign Finance Reports to log reimbursements.

What are things that Democratic committees spend their funds on? Here are examples of expenditures that are both **allowed, and beneficial**:

- Making donations to the campaigns of Democratic candidates (check regulations and limits first; regulations and limits vary depending on the type of campaign)
- Spending on materials on behalf of a Democratic campaign (again, check regulations and limits first; allowed expenditures and limits vary by type of campaign)
- Office space for use by Democratic campaigns; coordinated headquarters during election season
- Mailings, brochures, and outreach materials for your committee
- Website domains, design services, software
- E-mail systems
- Food and beverages for volunteers and meetings (no alcohol may be paid for with committee funds)
- Event and meeting-related expenses (i.e. hall or room rental, food and beverage, supplies, decorations, etc.)

Periodic Audit or Review: It is a sound practice for your committee to conduct a regular, periodic review of your committee's finances, in addition to the public reporting required by OCPF. The review should be led by the Treasurer, but should include other responsible individuals as well. Some committees opt to create a Finance and Audit Subcommittee for this purpose. Examine bank statements, as well as records of any transactions, to ensure that proper records are being kept, donations and expenditures are in keeping with law and regulation, and that transactions are consistent with information reported to OCPF.

Setting Up a Bank Account

As mentioned, your committee must have a bank account: you may not conduct your finances in cash only, and you may not use someone's personal bank account as a proxy for the committee's!

Applying for a Tax ID Number: If your committee does not already have a bank account, you will need to get a Tax ID number from the IRS before opening a bank account. This is easy and takes approximately 5 minutes online. Here are the steps to take.

1. To begin, visit sa.www4.irs.gov/modiein/individual/index.jsp and start your application.
2. You will be asked what type of organization you are applying for a Tax ID Number. Select "View Additional Types, Including Tax-Exempt and Governmental Organizations" and then select "Political Organization."
3. From there, you will choose the reason you are applying for a Tax ID Number and you should choose "for banking purposes."
4. At this point, the process is self-explanatory and a committee member will need to provide his/her Social Security Number to finish the application
5. Be sure to print and save the final page when you receive your committee's new Tax ID Number.

Your Treasurer should bring your Tax ID number to a bank or credit union to set up a checking account. We recommend you utilize a local financial institution (Democrats support local!).

Raising Money

Simple fundraisers and social events are a great way to raise money. Many committees opt for an annual or biennial awards breakfast, luncheon, or dinner, at which they recognize activists for their hard work. You may consider implementing a recurring donor program, where supporters commit to donating $5-$50 per month or quarter.

Some Rules to Remember...

- **Public employees cannot solicit money for your committee.** This means their name cannot be used on any fundraising invitation, and it also means they cannot be a featured speaker at your event. This does not extend to elected officials who are *elected* to their public jobs (i.e. your Congressperson or state legislator may speak and have their name used, but your appointed Assistant Town Treasurer may not).
- NO political fundraising should take place in any building occupied for a state, county or municipal purpose (including but not limited to public schools, senior centers, town or city halls, and libraries). You cannot hold fundraisers or even accept donations to your committee in any of these places.
- A political committee may **NOT** hold a raffle as a means of fundraising.
- While some committees collect annual dues from members, note that dues cannot be compulsory under State Party rules; members may elect not to contribute and still be eligible to participate.

Hosting a Fundraising Event

As mentioned, many committees opt for an annual or biennial awards breakfast, luncheon, or dinner, at which they recognize activists for their hard work. Some considerations in setting up such an event:

Identify a Host Committee

- Members of this committee should promise to raise or give a specific amount for the event.
- Accountability through communication. Stay in touch with the committee to track their progress.
- Publicly recognize these donors at the event for their generosity.

Budget and Logistics

- Set a specific and realistic monetary goal for the event. Factors influencing that goal:
    - Size of initial invitation list
    - Expected response rate
    - Event expenses (ex: location, food, insurance)
- Venue
    - ADA Accessible
    - Local
    - Low to no cost
    - Parking
- Date and Time
    - Double check holidays
    - Check the DemDispatch or the State Party's master calendar for conflicts
    - Finalize and announce date at least 6-8 weeks ahead of time
- Tickets and Sponsorships
    - Individual tickets should at least cover the per person cost of event
    - Majority of proceeds will come through sponsorships
- Food and Drink
    - Maximize profits by minimizing food and drink costs
- Event Name /Branding
    - Continuity breeds familiarity and will increase membership
- Other Considerations:
    - Surrogates
    - Printed Program (Selling ads = more profit)
    - Recognize sponsors / committee members
    - Sponsor board
- Awards
    - Recognize volunteers
    - Encourages recipients friends / family to attend

Build Your Invitation List: Who to invite?

- Personal network and host committee network
- Previous donors
- Donors to other organizations and candidates
- Local candidates, elected officials, and public figures
- Track each invitee and their responses

Mail, Email, and Phone Call follow up

- Follow-up mail invitations with email invitations

- Follow-up email invitations with phone calls
- Ask for sponsorship of event if a donor cannot attend
- Ask for ticket purchase if person says no to sponsorship

Event Day Checklist

- Sign-in table
- Complete RSVP list noting which guests have paid and which haven't
- Sign-in sheets to collect contact information
- Nametags
- Pens and Markers
- Collection Basket / Cash Box
- Sponsorboard
- Chum (stickers, buttons, yard signs, lit)

Suggested Timeline

- 6 weeks Identify Host Committee
- 5 weeks Build list
- 4 weeks Invitations in mail
- 2-3 weeks Targeted email / phone follow-up
- 1 week Confirm attendees
- Expect 25% of your responses the first two weeks, 25% the third week, and 50% the week of the event

Post-event Follow-up

- Track down outstanding pledges
- Thank donors
- Input contact information into VoteBuilder and/or your committee's email list

Monthly or Regular Giving/ Member Dues

Many local committees have had great success developing a program of monthly giving. While dues and membership fees cannot be compulsory, as mentioned, finding 10 active members who give $10 a month to your committee through ActBlue (more below!) will result in $2,400 raised over the course of an election cycle.

Committees may collect annual dues from members as a means of generating income; however *dues **cannot** be compulsory*; no one is to be excluded from your committee for an inability to pay. Dues must be voluntary.

Using ActBlue

ActBlue is the preeminent online fundraising tool for Democrats and progressive allies. ActBlue does not charge a monthly usage fee – it simply takes a small percentage from each contribution it processes. ActBlue then issues a check to your committee regularly, by mail, for the net contributions you received in the given period.

It's easy to set-up, and you can begin receiving secure contributions online within a week. Donors can set up their profile to give small donations on a monthly basis instead of one donation upfront, which can create a consistent flow of capital for your local committee. Contribution forms are easily customizable and can be branded for each and every event your local committee hosts throughout the year. It's also easy to set-up and host events using ActBlue, even allowing your to create a custom URL to include on paper invitations.

It is simple to track contributions via ActBlue for compliance purposes, and you are able to download a spreadsheet of donors at any time. You can also set up email alerts to receive notifications. Their website and customer service are reliable, and their training materials available online are easy to understand.

To get started with ActBlue, visit: secure.actblue.com/pending_entities/new

Thanking Donors

Always, always remember to **thank your donors** -- for each and every contribution! A letter or handwritten note of thanks from the Chairperson is best.

Reporting to OCPF

The Campaign Finance Report! A Campaign Finance Report must be filed by a committee that has met **any** of the following criteria during a reporting period -- It has:

- received contributions or other receipts totaling more than $100;
- made expenditures totaling more than $100;
- incurred liabilities totaling more than $100;
- acquired or disposed of assets totaling more than $100.

You can track your income and expenditures, **as well as file/ submit your reports,** using OCPF's "Reporter" system through their website. The system is relatively easy to use. Your login name is your committee's OCPF ID number. To obtain your password (or your OCPF ID # if you need it), call OCPF at (617) 979-8300. Staff can also help to explain how to use the Reporter system, if you need assistance.

Filing Deadlines:

- Pre-Primary Report: Due on or before the 8th day preceding the state primary, complete from the day following the date of the last report filed through 10 days before the due date.
- Pre-Election Report: Due on or before the 8th day preceding the state election, complete from the day following the ending date of the last report filed through 10 days before the due date.
- Year-End Report: Due on or before January 20 in the following year complete from the day following the ending date of the last report filed through December 31.

And remember…

Compliance with laws and regulations regarding campaign finance is important:

- As Democrats, we value public institutions, and the importance of transparency and ethical conduct that come along with handling political funds.
- When OCPF is forced to take corrective action, it usually results in a publicly-available letter outlining what wrongdoing has taken place, and what the enforcement action is. Ignoring campaign finance laws and regulations, or failing to ask a question when you aren't sure, can result in public embarrassment for your committee, its members, and the candidates you support. You don't want this! Always ask first when you're not sure.

When in doubt, ASK. We've mentioned that OCPF is available to answer questions about activities before they take place. You may also consult with State Party staff for guidance. Campaign finance regulation can be complex and confusing, don't hesitate to ask -- if you've got a question, chances are you're not the first Chair or Treasurer who has had that particular question.

Chapter Six: Running Your Annual Caucus *To Select Delegates To The State Convention*

The Convention and The Caucus: What Are They?

The Caucus: Every town and ward, every year, will hold a Caucus to elect delegates to the annual Democratic State Convention. The caucus is a meeting open to any and all registered Democrats residing in the town or ward, who together elect the town or ward's delegates to the convention.

As Chair, you call (organize) and run the annual caucus for your town or ward!

Each year, the State Committee will determine the number of delegates each town or ward has, and also set a window of time (usually about 5 weeks long) during which your caucus must take place. The state party will send you a packet each year that tells you how many delegates and alternates your town or ward will have at convention, and the timeframe for holding your caucus. They'll also send you a copy of the rules for the caucus (note these rules change slightly year to year). *The State Committee's Field Services Subcommittee runs trainings across the state for Chairs each on how to run your caucus, during the weeks leading up to the caucus window; watch for these on MassDems.org!*

The Convention: The convention is held every year, usually the first weekend in June. There are three types of convention:

- *Endorsing Convention:* This occurs every four years, specifically, the years in which a Gubernatorial election takes place. These are sometimes called "Nominating Conventions." This means that statewide candidates who receive 15% of delegate votes at the convention will be on the Democratic Primary ballot that year. During Endorsing Convention years, interest in going to convention as a delegate is especially high, expect big turnout at your caucus!
- *Platform Convention:* At Platform Conventions, the official Platform of the State Democratic Party is discussed, potentially amended, and ratified. In the leadup to a Platform Convention, a Platform Committee will be formed, which will hold hearings across the state to solicit input and testimony on key issues.
- *Issues Convention:* An Issues Convention is an opportunity to come together and talk about how we fight to make progress on real issues like climate change, healthcare, education, immigration, and civil rights. During the convention, delegates and alternates will join breakout sessions to work collaboratively with other delegates to develop strategies to organize for critical issues facing our Commonwealth.

Only one type of convention will be held during a given year.

Pro Tip: It's a good idea to check in with your Democratic State Committee members in the leadup to caucus season to get an update on next year's convention and caucuses. In the

months before caucus season, the State Committee will select a site and date for the next convention, as well as set the Rules for the coming year's convention and caucuses.

Timeline

Though the calendar changes every year (you'll be sent a packet that includes all of the specific dates well in advance), here is a rough overview of the timeline. **Understand these timeframes are subject to change each year**; consult the materials sent to you as Chair from the State Party. The calendar outline included here is ***just an example***; the entire timeline will shift if the date of the convention is changed during any given year.

- **Late Fall:** You'll receive your caucus packet in the mail, outlining how many delegates and alternates your town or ward has, the Rules for selecting delegates and alternates, and the specific dates as described below.
- **Mid January:** There will be a specified date by which you must report the date, time, and location of your caucus to party staff (instructions on reporting this information will be included in the caucus materials sent to you as Chair).
- **February-March:** "The Window!" Your caucus must occur within the specified timeframe. *NOTE: If your caucus needs to rescheduled because of snow, the new date does not need to be in the window.*
- **Mid to Late April:** Deadline for delegates elected to register & pay their delegate fee (after which a late charge will apply).
- **The First Weekend in June**: The Convention!

Again, this timeline is just an example: the timing of the Convention is subject to change each year, which in turn alters the related dates, windows, and deadlines. Watch for communications each year from the State Party regarding Convention and caucuses.

Calling Your Caucus

Your first order of business is to "call" your caucus! Pick the date, time, and location of your caucus and report it to the State Party by the designated deadline.

Remember:

- The Caucus must occur in the specified window of dates
- Your caucus should not be held during the regular business day, or at an inappropriately early or late hour. Each year, the Rules for selecting delegates will outline specific time restrictions, but a good rule of thumb is that caucuses should not take place before 6 PM on a weekday, or before 9 AM on a weekend.
- The caucus must occur at a location open to the public, and must be ADA accessible.
- Make sure your venue is available for a sufficient amount of time; more time may be necessary in Endorsing Years!
- In Endorsing Convention years, plan for a bigger crowd!

Preparing for Your Caucus

Before Caucus Day:

Notify registered Democrats in your town or ward of the caucus: Notice should appear in local media no sooner than thirty and at least nine days before your caucus. Send a notice or press release to your local paper(s), post to social media, and use your regular email notification system to inform folks! Every community is different; pick the publications that make the most sense to reach Democrats in your community. Call publications in advance to find out what their preferred method of submitting announcements or press releases is, as what their deadlines are. Your announcement should mention that folks can register as a Democrat on-site. *A sample press release for announcing your caucus is included in the Appendix of this manual.*

Obtain a copy of the most recent official registration of Democrats from your local Clerk, for Caucus registration. Specify to the Clerk's Office that you need both Active and Inactive voters who are Democrats, and pre-registered voters who are Democrats, and ask the list be pulled after any new voter registration forms they have on hand have been processed.

Recruit volunteers to assist with registration and balloting at the Caucus! Your State Committee members and Chairs of neighboring communities are a great source of knowledgeable volunteers to help manage a caucus! A listing of Chairs and State Committee members, as well as their contact information, is available at MassDems.org. Students who are interested in the process, but not old enough to participate, can also be a great source of volunteers!

Make copies of the Caucus Attendee Sign-in Sheets, the Delegate Certification Forms, the Add-On Delegate forms, and Registration Fee Waivers. These will arrive with your caucus materials from the State Party. Have current voter registration forms on hand as well! Have voter registration forms available in other languages as appropriate for your community.

If this will be your first caucus -- consider attending another caucus in a nearby community before yours, to observe the process and get a better handle on how things should go. A complete listing of caucuses, including their dates, times, and locations, will be published on MassDems.org.

On Caucus Day:

Try to arrive an hour early to set up, and to troubleshoot any problems that may occur with your site (the doors are locked, the heat not turned on, not enough chairs, etc.). Ask your volunteers who will help you with registration and balloting to arrive 45 minutes to an hour early.

Set up a registration area: have a table where your volunteers will check in participants to ensure that they are registered Democrats residing in the community, and for participants to sign in on the Caucus Attendee forms. *Set up a separate table or area to assist those that aren't properly registered* (but want to participate) with registering as a Democrat.

Post the "Preliminary Call to Convention for the Massachusetts Democratic Party" document in your caucus site, or otherwise have it out on a table and available for viewing.

Designate an area where caucus participants will sit, and a separate area where non-participants may observe.

Set up a dry erase board, easel, chalk board, or large pad of paper (whatever is available, or whatever you brought) where you or a volunteer can write down the names of folks who are nominated for all to read.

The Rules of the caucuses will specify when registration is required to open, usually 15 or 30 minutes before the posted start time of your caucus, depending on the year. Make note of the time requirement, and make sure you're opening registration at the appropriate time. Note that registration must remain open 15 minutes *after* the posted start time of the caucus as well; note also that anyone still in line to register once that 15 minute period passes should still be allowed to sign in and take part!

Remember this is an open Democratic Party meeting:

- No person shall be denied admittance.
- An area shall be set aside for those not eligible to vote in the caucus.
- Only registered/pre-registered Democrats residing in the ward or town may vote and/or run for Delegate/Alternate; if they aren't on the list they must register/pre-register as to participate. More on this later!

Registration must remain open until 15 minutes after the scheduled starting time or until all who were in line have registered.

Running Your Caucus

Complete the check-in process. Remember, Caucus registration must open 15 or 30 minutes (depending on the year) prior to the posted start time, and must remain open 15 minutes after. Anyone still in line to check in at the close of that time must be allowed to complete the check-in process and take part. *Make sure everyone understands that registering to participate in the caucus and registering to vote are separate things.*

What to Do When Someone Isn't On the List: So someone is at your caucus and is not on the list of registered Democrats living in your town or ward. What now? The person can do one of two things:

Option 1: *Provide you with proof of registration:*

- Receipt from Town Clerk or Elections Division
- Smart phone showing information from the Secretary of the Commonwealth website (where voters can check their registration status)

Option 2: *Registering as a Democrat on site:*

- Electronically on the Elections Division website
- Paper registration form; you should have current Voter Registration forms on hand

Sixteen and Seventeen year olds: In Massachusetts young people who are age sixteen or seventeen can now "pre-register" to vote. Caucus rules typically specify which voters may take part, and depending on the year, these pre-registered Democrats may be eligible. Pre-registered voters will not appear on the list: Pre-registered Democrats, depending on their age and where you are located, may or may not appear on your list. No problem! This will be handled just like an adult not on the list. More on this later.

Time to begin the agenda! Remember that no nominating or balloting to elect delegates or alternates may occur until after the 15 minute grace period for registration, after the posted start time, has passed. However, you may begin other agenda items/ begin reading required documents, or have guests speak, during that 15 minute period!

The agenda contains seven components, and per the Rules, looks like this (more detail on each section below):

A) Introduction and overview
B) Affirmative Action Statement
C) Review the rules
D) Ex officio delegates
E) Letter from the chair
F) Delegate fee waiver
G) The nomination and election of delegates and alternates

After Your Caucus

Determine the ranking of the alternates: Rank is based on number of votes received. If there was a tie or if the candidates were deemed elected then the rank is determined by lot.

All Delegates and Alternates must COMPLETELY fill out their Delegate Certification form before leaving.

Report your results. Follow the instructions from State Party staff about reporting your results and mailing in your completed Caucus materials. Note this process must be completed no later than seven (7) days following your Caucus. Note that if your completed caucus materials have not been received back by the State Party office six weeks after the scheduled caucus, no one shall be seated in the ward or town chair's ex-officio delegate position. ***Make a copy*** *of your caucus materials before mailing them into the State Party, just in case!*

And Most Importantly: Remind folks, especially those who took part for the first time today, that even if they weren't elected, the Democratic Party wants them to stay involved! Encourage

people to volunteer at the Convention if they'd like to attend. Discuss with your town and ward committee members in advance how you might like to get new folks who showed up at caucus to take part in your regular activities. Put this plan into action before they even leave the caucus room!

APPENDIX A. DIRECTORY

How to Contact the Massachusetts Democratic Party

Address: 11 Beacon Street, Suite 410, Boston MA 02108
Telephone: 617-939-0800
Email: contact@massdems.org
Website: MassDems.org

Keep up with the State Party on social media!
Facebook: Facebook.com/MassDems
Twitter: @MassDems
Instagram: @MassDems

Contact Information Available at MassDems.org

At any time, you can find available on MassDems.org full contact information for:

- The Chairperson and other officers of the Democratic State Committee
- Staff for the State Party
- Members of the Democratic State Committee
- Subcommittees of the Democratic State Committee
- All City, Town, and Ward Chairs across the state

How to Identify and Contact Your Elected Officials

- Common Cause runs a service, "Find Your Representatives," based on a residential address search that will identify all Federal and State elected officials: www.commoncause.org/find-your-representative/
- The U.S. House of Representatives "Find Your Representative" portal: https://www.house.gov/representatives/find-your-representative
- The Massachusetts state legislature maintains a similar page to identify your state Senator and Representative by residential address search: https://malegislature.gov/Search/FindMyLegislator
- The Secretary of the Commonwealth's Office maintains a web portal, www.WhereDoIVoteMA.com, which enables individuals to search their residential address to determine their polling place, view a sample ballot in a state election, and which lists their Federal and State elected officials

APPENDIX B. GLOSSARY OF TERMS

20 Year Members (also called Lifetime Members): Each City, Town, or Ward committee has between 3 (minimum) and 35 (maximum) elected members; this number varies by Town and Ward, but in most cases is set at 35. Once someone has served on your committee for 20 years, they are able to remain on your committee without counting against your total allotment; this is done so that seats can open up regularly for new people, while continuing to include and longtime members.

Affirmative Action and Outreach Advisor (Officer Role): a mandatory officer role on a local committee, encourages full participation by all segments of the population, leading and coordinating outreach to marginalized communities including but not limited to underrepresented ethnic and racial groups, persons with disabilities, LGBTQ+ individuals workers, youth, low and moderate income people, women, and senior citizens.

By-laws: The rules that govern an individual committee. The Democratic State Committee operates under a set of by-laws, consistent with the party's Charter. Each local city, town, or ward committee may adopt its own by-laws, so long as they are consistent with the Charter. The State Party provides a set of Model By-laws for local committees to use; if a local committee has not adopted its own bylaws, the Model By-laws are considered to be in effect for that committee.

Caucus: The Caucus is a meeting open to any and all registered Democrats residing in a city, town, or ward, held every year, who together elect the Town or Ward's Delegates to the convention. The Chairperson of the town or ward committee also Chairs that community's Caucus.

Chairperson (Officer Role): The local chairperson shall be the principal executive officer of the town, ward or city committee, with primary responsibility for enforcement of the provisions of this Charter and by-laws at the local level and for communications between local committees and the State Committee. The chairperson shall preside at all meetings of the local committee and at caucuses called by it.

Charter: The Charter of the Massachusetts Democratic Party is the state party's foundational, organizational document -- its constitution. The Charter establishes the Democratic State Committee, our local committees, and basic governance rules for each. The Charter is available at all times on the State Party's website, MassDems.org.

Convention (Democratic State Convention): A statewide gathering of Democrats called by the Democratic State Committee. A convention is held every year, usually the first weekend in June. There are three types of convention:

- *Endorsing Convention:* This occurs every four years, specifically, the years in which a Gubernatorial election takes place. These are sometimes called "Nominating Conventions." This means that statewide candidates who receive 15% of delegate votes at the convention will be on the Democratic Primary ballot that year. During Endorsing

Convention years, interest in going to convention as a delegate is especially high, expect big turnout at your caucus!

- *Platform Convention:* At Platform Conventions, the official Platform of the State Democratic Party is discussed, potentially amended, and ratified. In the leadup to a Platform Convention, a Platform Committee will be formed, which will hold hearings across the state to solicit input and testimony on key issues.
- *Issues Convention:* An Issues Convention is an opportunity to come together and talk about how we fight to make progress on real issues like climate change, healthcare, education, immigration, and civil rights. During the convention, delegates and alternates will join breakout sessions to work collaboratively with other delegates to develop strategies to organize for critical issues facing our Commonwealth.

Only one type of convention will be held during a given year.

Democratic City, Town, or Ward Committee: Your Democratic Town or Ward Committee is the local Democratic Party entity in your community, responsible for organizing local Democrats, working to elect Democrats to public office, and increasing Democratic registration in your neighborhoods.

Democratic State Committee (DSC): The governing body of the Massachusetts Democratic Party. It is established by the Charter of the Massachusetts Democratic Party, and governed under that Charter and the Party's bylaws. Its role is to elect Democrats to state and federal office, and support local City, Town, and Ward committees in their efforts to do the same locally. The DSC elects a Chairperson and other officers to lead the committee; the Chairperson hires a staff, led by the Executive Director, to help administer the state party.

Democratic National Committee (DNC): The DNC's role is to organize and host a Democratic National Convention every four years, which formally selects the party's candidates for President and Vice President, and set a platform; to establish the rules and calendar under which states allocate their delegates to the National Convention; to provide resources to support Democratic campaigns for major offices; and to provide financial and organizational support, as well as other resources, to state Democratic Parties. The DNC itself does not select the party's candidates at any level.

Office of Campaign and Political Finance (OCPF): an independent state agency that administers Massachusetts General Law Chapter 55, the campaign finance law, and Chapter 55C, the limited public financing program for statewide candidates. This is the state's regulatory agency that governs campaign finance, to which all party committees report their income and expenditures, and which sets regulations related to campaign finance.

Reorganization: a term for the meeting where you elect your committee's officers. Your reorganization meeting must take place in even-numbered years prior to April 15th. In years with a Presidential election, the reorganization must occur after the Presidential Primary has taken place. A committee may, in their local bylaws, choose to reorganize every four years instead of every two.

Secretary (Officer Role): a mandatory officer role on a local committee, keeps a true, accurate and complete record of the proceedings of the meetings; issues written notices in advance of all meetings of the Committee; and is responsible for the incoming and outgoing correspondence of the Committee. The Secretary is responsible for maintaining the mailing list of the Committee; for many committees, this includes the email distribution list or system.

Subcommittees: While not required, many local committees opt to create subcommittees that focus on particular areas of work, or even to plan specific activities and events. Examples of subcommittees include Recruitment, Fundraising or Finance, Campaign Support, Bylaws, Programming or Issues, Social Media and/ or Media Relations, and Youth Services or Youth Outreach.

Treasurer (Officer Role): a mandatory officer role on a local committee, the Treasurer has the care and custody of all funds of the Committee; receives all incoming moneys and pays out all moneys for expenses, donations and other expenditures required in the conduct of the Committee's business; and keeps an accurate, up-to-date financial record. The Treasurer makes an annual report of the Committee's finances, in addition to periodic interim reports.

Vice Chairperson (Officer Role): an optional officer role on a local committee who, in the absence or inability of the Chairperson, assumes the duties of the Chairperson. In the event of removal or resignation of the Chairperson, the Vice Chairperson assumes the office of Chair. Some committees have more than one Vice Chairperson.

VoteBuilder (VAN): VoteBuilder is a software product, produced by the company NGP VAN. It is a web-based voter database system that enables users to look up individual voters, create lists of voters based on criteria ranging from the very simple to the very complex, and track interactions with voters. VoteBuilder is free for use by City, Town, and Ward committees, courtesy of the State Democratic Party and the Democratic National Committee.

APPENDIX C. SAMPLE CALENDAR/ PROGRAM FOR LOCAL COMMITTEE

What follows is a sample Calendar of Events for a Local Committee, during a year containing a regular state election.

Please remember that these are ***simply suggestions.*** Some committees choose to do just one annual event. Some do a holiday party while others do a summer social/picnic. Please don't look at the suggested calendar and think "We can't do all this."

This seems an appropriate time to share the words of John Walsh, former MDP Chair. He had a standard answer when people asked him what their local committee should be doing: *"Do something and tell people about it."*

***Please note:** the timing of the State Convention, and the window in which to hold Caucuses, is subject to change each year. The calendar below reflects a typical year.

January

- Monthly Meeting: Brainstorming for the year ahead
- Begin Planning Spring Fundraiser
- Plan for February's Caucus*

February

- Hold Caucus to Select Delegates to State Convention*
- Follow Caucus with Monthly Meeting
- Generate invitation list and invitations for Spring Fundraiser

March

- Monthly Meeting: Issues Forum! Invite a speaker on a topic members care about, or your state legislator, to address the committee
- Phone calls to follow up on invitations to Spring Fundraiser

April

- Spring Fundraising Event
- Monthly Meeting: Evaluate Fundraising event, Plan for Spring/ Summer Cookout
- Meeting option: Have a speaker with an environmental theme. If you don't have a speaker have members share their own ideas about how to help the environment and fight climate change.

May

- Monthly Meeting: Pull the list of newly-registered Democrats in community over the past year, invite them to June Cookout

June

- Democratic State Convention
- Make calls or knock doors to follow up on cookout invitations
- Summer Cookout: collect contact information for new attendees,
- Meeting suggestion: have a voter registration drive at your meeting. Bring forms and post that people can drop in and change their registration to Democrat or register to vote. Reach out to new High School graduates.

July/ August

- Skip formal meetings for the Summer months, but continue to pass along opportunities to volunteer with campaigns to your email list & social media
- Reach out to Democratic campaigns about organizing canvassing, phone banking, and standouts in your community after the primary

September

- Primary Election time! Democratic nominees will be chosen in contested primaries; be ready to begin canvassing in your community for the ticket right away!
- Canvassing, phone banking, visibilities happening each week: coordinate with campaign staff

October

- Monthly Meeting: Focus on recruitment for the Get Out The Vote (GOTV) push in the closing days of the campaign -- all hands needed on deck!
- Canvassing, phone banking, visibilities happening each week: coordinate with campaign staff

November

- GOTV! All hands on deck helping to turn out Democratic voters in your community over the week leading up to Election Day. Coordinate with campaign staff.
- Monthly Meeting (Post-Election): Review election results and turnout figures from your community, reflect on Democratic performance, discuss what worked and what didn't
- Monthly Meeting Suggestion: Incorporate a food drive into your monthly meeting. Invite the public to drop off food donations. Have a speaker on hunger issues.

December

- Consider a holiday party or other social gathering in addition to or in lieu of a monthly meeting; your team has worked hard all year, time to celebrate!

APPENDIX D. SAMPLE PRESS RELEASE: ANNOUNCING YOUR ANNUAL CAUCUS

FOR IMMEDIATE RELEASE
CONTACT: Mary Smith, Chair, Anytown Democratic Committee
555-555-1234, MarySmith@Sample.com

ANYTOWN DEMOCRATS TO ELECT DELEGATES TO STATE CONVENTION

ANYTOWN -- Registered Democrats in Anytown will be holding a caucus at [CAUCUS LOCATION] on [DATE] at [TIME] to elect [NUMBER] delegates and [NUMBER] alternatives to the [YEAR] Massachusetts Democratic Convention, where Democrats from across Massachusetts will gather to [endorse candidates for statewide office/ adopt a platform/ adopt a new Action Agenda]. The Convention will be held on [CONVENTION DATE] at the [VENUE] in [CONVENTION HOST CITY].

“This is going to be an exciting year as we Massachusetts Democrats work hard to get our message out,” commented Mary Smith, Chair of the Anytown Democratic Committee. “Our convention will be a wonderful opportunity for Democrats to come together, discuss our values, and plan for the coming campaign.”

The caucus is open to all registered Democrats in Anytown, and the Democratic Committee welcomes participants. Delegates will be divided equally between men and women, and all ballots will be written and secret. In the spirit of inclusion, youth, minorities, and people with disabilities who are not elected as delegates or alternates may apply to be “add-on” delegates.

The committee normally meets on the third Tuesday of the month at the Anytown Community Building. For more information on the caucus or the committee please contact Mary Smith at 555-555-1234 or MarySmith@Sample.com, or visit their website at www.anytowndems.org.

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APPENDIX E. SAMPLE PRESS RELEASE: GENERAL

FOR IMMEDIATE RELEASE
CONTACT: Mary Smith, Chair, Anytown Democratic Committee
555-555-1234, MarySmith@Sample.com

SENATOR EXAMPLE TO ADDRESS ANYTOWN VOTERS

ANYTOWN – State Senator Elaine A. Example (D-Anytown) will address voters here Anytown on Saturday, October 4th at 7:00 PM at the Anytown Community Building at 123 Main Street. The event is open to the public. Light refreshments will be served. The building is handicapped accessible.

Senator Example will be discussing potential legislation and providing a general legislative update. [*Add more information here if you have it or can easily get, including a general overview of the bills Senator Example intends to discuss*]

The Anytown Democratic Town Committee is the local arm of the Democratic Party. The Anytown DTC members share a common vision aligned with the principles of the Democratic Party and work locally in a variety of ways to support these principles.

The committee normally meets on the third Tuesday of the month at the Anytown Community Building. For more information on the event, or the committee, please contact Chairperson Mary Smith at 555-555-1234 or MarySmith@Sample.com. You may also visit the committee's website at www.anytowndems.org.

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APPENDIX F. SAMPLE BROCHURES

Available here

APPENDIX G. SAMPLE EMAIL NEWSLETTER

[Sample email provided as separate file to be inserted into final edition]

APPENDIX H. SAMPLE OUTREACH/ RECRUITMENT SCRIPT

See Chapter Three: Recruitment & Outreach for a discussion of how to identify potential recruits.

General Rules of Thumb:

- *You are extending an invitation: even if your recruitment target is unable or unwilling to get involved right now, they will remember a kind invitation as a positive gesture. Always be polite and courteous!*
- *If someone isn't interested in getting involved right now, assess whether they would be in the future. Make sure you have the best and most complete contact information for them; add them to your email list if they'll allow.*
- *It's possible someone may not be interested in getting involved with your committee itself, but might still be interested in volunteering for Democratic campaigns. Collect complete contact information for such people, and include them in your recruitment for campaign-focused tasks such as canvassing, phone banking, and sign holding at Election time.*

Hello, is _____ available? My name is _____, and I'm the Chairperson of our local Democratic [Town/ Ward] Committee. I wanted to reach out because I know that you…[Indicate reason for outreach]

…have been active in Democratic campaigns in the area
…have been involved with the Committee in the past
…have been a regular donor to area Democratic campaigns
…have recently moved into the community and registered as a Democrat
…have recently changed your Party registration to Democrat

…and I wanted to extend an invitation to you personally to get involved with the Committee! We meet once per month on the Second Monday of the month at 7:00 PM, in the Community Building on Main Street. Would you be interested in getting involved?

IF YES: That's great! Will you be available to attend our next meeting? Can I get your email address to add to our list, so that we can keep you in the loop?

IF NO, Definitive: I understand. Thank you anyway for your time.

IF NO, Generally Interested But Too Busy At Present: I understand. Would you be interested in being added to our email list, so that we can keep you in the loop?

IF NO, But Supportive of Democrats and the Democratic Party: I understand. Would you be interested in volunteer opportunities for Democratic campaigns in the community? *[If yes, add this person to your Campaign contact/ recruitment lists. Ask for an email address]*