



Lobbying Office Holders 1: The Basics of Lobbying

BY RICHARD P. BURKE

LOBBYING: THE HEART OF IT ALL

"Lobbying" public office holders, or trying to convince them to do something (or NOT), is at the very heart of citizen activism. There are many ways to lobby public office holders, referred to here as "electeds", but this unit will focus on personal meetings. **There is no form of citizen lobbying more effective than a personal meeting.** This unit will tell you how to lobby elected officials and convince them to vote your way on important issues. Following the advice in this unit will not guarantee success, but it will make you an effective citizen lobbyist - You will succeed more than you fail.

1 SET AN APPOINTMENT AND BE ON TIME

If you simply show up at an elected's office without an appointment, you probably won't get one - at least not on the same day. This is especially true of legislators who have jam-packed schedules. Occasionally, you might get lucky and the elected will say, "Hi, come on in!". But unless you already have a personal relationship with the elected, such opportunities are rare. But remember - even when you are granted an instant appointment, you may be disrupting the schedules of the elected and his or her aides (not a good way to start).

Make an advance appointment. You can almost always do this by phone. If the elected has no time available or if the earliest available time seems too far away, it may make sense to also try to make an additional appointment with the elected's senior staff member. The key is to make your issue an active issue in the elected's office. **When you get an appointment, BE ON TIME.** The schedules of electeds, particularly legislators, are usually packed. Still, five or ten minutes early - sometimes you will get in early and get a little extra time.

STAFF AND AIDES: THE GATEKEEPERS

Many electeds, especially at the state legislative level and above, hire staff to help them with their day-to-day work. It is VITAL that you develop a good relationship with staff and aides.

Staff members are the gatekeepers to the electeds you want to lobby. They have regular and easy access to electeds and often influence their decisions. They

control the schedules of their electeds. Because electeds often don't have time to read every piece of legislation, they sometimes ask their aides how they should vote - and usually follow their recommendations. **If you can win over the staff, you will often win over the elected too.**

Some staff members and aides are experienced while some are very young and inexperienced. In either case, don't underestimate their ability to help or hurt your cause. Staff and aides are used to being treated disrespectfully. They are usually underpaid. But if you treat them with respect, you will stand out from the many people who want something from them and treat them like dirt. Staff and aides will be more likely to remember you in a good light. They will be more inclined to work you into their elected's schedule or represent your position favorably.

1 OBSERVE BASIC ETIQUETTE

When you visit an elected, always look sharp. While it is not usually necessary to dress like a business person, so-called "business casual" attire is usually appropriate. Always address the elected by their title - "Good afternoon, senator," or "Thank you commissioner, I wasn't aware of that." If you are talking to a staff member, address them by their surname: "Thank you Ms. Smith, have a nice day." As they become familiar with you, electeds and their aides will often ask that you use their first name. Even then, resist doing so unless they insist. Although they are unlikely to admit it, most electeds like to be addressed by their title.

Don't be disruptive. If you are waiting to see an elected before an appointment, be sparing in your smalltalk. They are often very busy and, while they want to be polite to you, they need to get their work done. Their body language will tell you what to do. Don't try to look around at their computer screen (yes, people have done this), or otherwise intrude.

Always be polite and professional, even if you are angry. NEVER lose your cool even in the unlikely event that an elected or an aide shows disrespect to you. When your appointment is over, leave gracefully. If the elected wants you to stay beyond your appointment's scheduled end time, he or she will tell you. Always tell the truth, never exaggerate a position or misrepresent a fact.

Be prepared for your meeting. Before your appointment, be very clear with yourself about what you want to accomplish. **Be clear about the central principle you are advancing.** If you need supporting information,

have it ready and organized. Otherwise, your time and that of your elected will be wasted and it will be harder to get an appointment in the future.

Finally, thank your elected and his or her staff for their time. While electeds work for us, it is human nature for people to consider their time valuable. **If a staff member did a special favor for you, a “Thank You” note will help to ensure you will get preferential treatment in the future.**

2 TELL THEM WHO YOU ARE

When you meet with your elected, he or she will probably know your name. Introduce yourself anyway, unless you are familiar with the elected. **Tell them WHO you are that makes you worth listening to.** For example, if you are active in your PTA, your elected will know that you are active in your school and know a lot of people. The same holds true if you are a member of a civic club, organization, or service society. Telling them you are a member of Oregon Prosperity Network will let your elected know you are part of a large group. If you live in the district or zone they represent, tell them. **Remember: Electeds respond to political power and they want to know how much you have.**

3 TELL THEM WHY YOU'RE THERE

After you have told them who you are, tell them why you asked for a meeting. For example, “I have come to speak with you about House Bill 9999 which I think will make it hard for parents to put their children through college,” or, “I have come to support House Bill 9998 which will create thousands of family wage jobs in my community.” The elected will then know your name, why he/she should listen to you, and why you are there.

4 TELL THEM YOUR STORY

Consultants and professionals are great at showing graphs, charts, and focus group results. But you might be astonished to know that, in the world of politics, few things have the impact that a personal story does. Politicians respond to political power. Consultants and attorneys may be better armed with statistics and elaborate scenarios, but the personal stories of constituents who know people in their communities REPRESENT VOTES.

This is your chance to personalize the issue you are working on and make an impact on the elected or staff member you might be talking to. For example: “My father grew up in my home town manufacturing widgets. So did his father. I am a third generation widget maker. The widget industry is key in my town and is important to our identity, drives our town’s economy, and is part of our heritage. If this ordinance passes, you will shut down our industry. I will have to pull my kids out of school and move. This ordinance will kill my community and end a way of life that has endured for one hundred years. People like me will have to take

unemployment and other forms of public assistance. It is humiliating, and I know my neighbors agree.”

The objective here is to attach a human face and a human story. **By bringing emotional and intellectual impact to your position, you bring political power to your position. As you prepare your personal story, think about the central principle involved and articulate this principle clearly when you testify.** Such principles could be “freedom”, “choice”, “facilitating prosperity”...this will vary depending on your issue. But always be clear about the principle at the heart of your story, with those you are speaking to and with yourself.

5 TELL THEM WHAT YOU WANT

Finally, and perhaps most important, TELL YOUR ELECTED PRECISELY WHAT YOU WANT THEM TO DO. As you conclude, always say something like, “These are the reasons I urge you to vote for Ordinance 32-3 and help preserve jobs in my community,” or “So for these reasons, I strongly urge you to vote AGAINST Senate Bill 8888 and protect charter schools throughout Oregon”. Bottom line, tell them what you want them to do.

You are a salesperson when you lobby an elected. Ask for their commitment. You might get it, you might not - but you will get an idea about where you stand. Your product is your position on an issue, and you are trying to convince the elected you are talking to, or his/her staff, to adopt your position instead of someone else’s. Always ask for the sale.

LOBBYING: OTHER WAYS TO LOBBY

There are other ways to lobby your legislature. Emails work, but they are often discarded unless the recipient knows you or your email is one of many received on a topic. Faxes are better than emails. Phone calls are better than faxes. **Personal meetings are the best. When possible, DO EVERYTHING and ask your friends to do the same.**

In the long run, no matter how you lobby, following this formula will lead you to success.



Lobbying Office Holders 2: Seeing Things From Their Side

BY RICHARD P. BURKE

UP YOUR LOBBYING GAME: PUT YOURSELF IN THEIR SHOES

For any grassroots organization or individual activist who wants to be politically effective over time, it is important to learn how to effectively lobby public office holders. If you can persuade them to introduce, support, oppose, or amend proposed legislation, you will be able to move policy. For those who wish to be taken seriously by elected officials, it is important to learn how to see things from their perspectives and try to see things through their eyes – not just yours.

1 BE POLITICALLY REALISTIC

It is important to remember that public officials, contrary to public opinion, are actually human beings with all of the egos, hopes, fears, strengths, and weaknesses everyone else has. Remember that when lawmakers commit to taking strong positions on any issue you care passionately about, they will likely invest a lot of resources and take big risks to their positions in society, their careers, and political futures. Generally speaking, the more difficult the issue, the higher the risk.

Even more to the point, **failure always exacts a political cost**, and often personal and professional costs too. Here is an example:

Supporting a issue to reign in excessive public pensions can make a legislator look weak if he or she cannot advance the issue, and a perception of weakness held by other legislators can make it harder for him/her to advance other important issues. If the bill runs counter to the position of the company he or she works for when the legislature is not in session, support of the bill can compromise his or her career outside the legislature. And, don't forget, things might get cold at home if his or her spouse has a relative living on a public employee pension.

Perhaps, ideologically, none of these issues should matter. Ideally, an office holder will act solely on principle. Unfortunately, other motivations often determine what an office holder will do. Remember that many office holders are able to get elected because they are skilled in working out the consequences of decisions they make – they're not going to stop making political calculations once they are elected. As frustrating as this can be to passionate activists, this dynamic can be overcome by showing them how supporting you will help them to secure and build their political position, reputation, influence, and prestige.

2 EVEN THE GOOD ONES WON'T WANT TO TILT AT WINDMILLS

There are good office holders out there willing to do the right thing on principle even in the face of political, professional, or social risks. But even these officials will rarely stick their necks out for you unless there is a realistic chance of success. Put yourself in their shoes: If you ask lawmakers to risk their political, professional, and personal lives for causes that have no chance, they will not take you seriously and your credibility as a serious citizen lobbyist could be seriously compromised. Make sure what you ask for is “politically do-able.” Pick your battles carefully.

3 LET THEM KNOW YOU'VE GOT THEIR BACK

Those who take strong principled stands usually come under fierce attack by their ideological opponents. They will be attacked on the blogs and in Letters to the Editor, and on social media. Legislation they care about might be killed or “gut and stuffed” by political opponents. They might get kicked off of committees which hear on important bills (I've seen this happen first-hand). Back home their opponents might spend a lot of money to sully their names in order to unseat them in the next election. Politics can be a very tough game. It has been said that if one wants friends in politics they should “buy a dog.”

If you ask lawmakers to take tough stands that could invoke this kind of wrath, your chances of getting them to say “YES” are much better if you show them that you've got their backs. Show them that you are organized and are prepared to defend them on the blogs, in the newspaper, in your neighborhoods, in public venues, on social media, or anywhere else their opponents may try to sully their name. If you do, the lawmakers you lobby will know they will not be out there twisting in the wind. Once you demonstrate your loyalty, will also have a very strong ally.

PRESTIGE IS POWER: PROTECT THE STATUS OF YOUR FRIENDS

In politics, perception often becomes reality. If someone is perceived to be effective, they become effective. If they are perceived to be ineffective, they become ineffective. Strange, but that's the way it is.

Sometimes reputations are deserved, sometimes not. Over time the truth usually comes out, but frequently not in time to prevent political damage or save (or kill) a specific proposal. Either way, the reputations elected officials earn can have a real impact on their ability to do what you want them to do. This is a reality of politics.

After all, public officials must often influence other officials to pass or stop any controversial piece of legislation. He or she will need to share frank opinions in confidence behind closed doors and handle sensitive information carefully. He or she will have to find common ground when common ground is hard to find. To handle these challenges successfully, it helps if the public official you are working with has an intact reputation among other officials.

Bear this in mind when you lobby elected officials. Work to point out ways in which supporting your position could raise a lawmaker's stature among other lawmakers, lobbyists, reporters, and the people back home. Sometimes, one has to make the hard choice. But where possible, avoid asking public officials to do things that might undermine their reputation among others.

1 FORM A LOBBYING TEAM

It is often effective to form a three person lobbying team when preparing to meet with legislators or other public officials. Unless the public official you plan to meet with objects, all three of you should meet with the office holder at the same time. Unless the public official requests it or otherwise agrees in advance, don't bring additional people as this can sometimes make office holders feel like they are being "ganged" up on. According to your own judgment, you might want a lot of people to come with you to the meeting, but only your three person lobbying team should meet privately with the public office holder.

Your lobbying team would do well to meet prior to your appointment in order to plan your lobbying trip. All three members of the lobbying team should assist in research and developing lines of persuasion and discussion. Don't just research your issues – research the political, professional, and personal background of the public officials you will meet.

One member of your team should be selected to be the leader; the one who will take point in speaking with the legislators and fielding questions. A second member, an assistant, should be there to provide opinions and make comments which support and reinforce the leader. This person can also interject to break tension that might develop as the leader speaks with the office holder. A third team member should serve the function of a secretary; he or she should carry and have at hand any information that is needed, be able to pull up any information or research your team brings along, keep an eye on the time, take notes, and occasionally interject in a way that supports the leader.

2 FOCUS ON THE BENEFITS

Any experienced sales person will be quick to provide you with the following quote: "People always buy benefits, not features." The same is true here; you are essentially selling a position you want public officials to adopt. Office holders will respond favorably to benefits you can outline in the positions you want them to adopt.

3 THEY MIGHT NOT EAT THE WHOLE BANANA

Some or even all of the office holders you talk to may insist that the plan is too bold to be passed in one session or with a liberal governor in office. They may say that the proposal is unrealistic. If you think this could happen, organize your request in a way that can be taken up by the officials you are lobbying in whole or in part. This will increase the number of ways you and the office holders you are lobbying can find common cause.

If an office holder is adamantly opposed to your positions, ask he or she if there are any portions of your positions that he or she likes. This may make it possible to convince an office holder to take up at least a part of your idea. Assuming your agenda is not totally crazy, good public officials can usually find common ground to work with you on. If he or she cannot identify at least one idea in your proposal or position that he or she can support, that office holder may not be dealing with you honestly or may not have any interest in your success.

4 KEEP YOUR COOL - STAY PROFESSIONAL

If you become frustrated, keep your cool. If any member of your lobbying team loses his or her temper, word will get around and the credibility of your lobbying team may be compromised. More immediately, your appointment will collapse and you will leave without having accomplished anything while burning a bridge behind you. At the very least, find ways to part that facilitate mutual respect even if you cannot agree. If you do not burn bridges, an opponent today could be an ally tomorrow when you are working on a different issue.

5 STICK WITH IT AND YOU WILL BE SUCCESSFUL

Over time, if you lobby public office holders while bearing in mind the tips outlined in this document, you will eventually meet with legislative success. Stick with it and you WILL become an effective citizen lobbyist and successfully advance your political agenda! ✓



How To Be Effective In Informal Debates

BY RICHARD P. BURKE

PURPOSE:

Those who master basic debating skills will be effective in public life and (often) in private life. Whether debating with your spouse, your employer, your friends at a coffee shop, or your state senator, using basic debating tools will improve your chances of winning the argument. The purpose of this course is to provide you with these basic debating guidelines...

1 IDENTITY YOUR AUDIENCE

Who are you really talking to in your debate? Obviously, if you are in a private one-on-one discussion, your audience will be the person you are talking to. But if you are at a family event, a coffee shop, a TV or radio show, or a service club, think carefully about it - **your real audience may be those around you who are listening, not the person you are debating.** It might be smart to focus on convincing **THEM** instead of your opponent!

2 ALWAYS BE NICE... NO MATTER WHAT

Political debates can be vigorous and emotional. **But when an issue becomes too emotional or personal, reason stops working as a tool of persuasion.** If you find yourself raising your voice, calling people “idiots” (especially those you are debating), pointing fingers at faces to make a point, or using profanity or wild gestures, you have already lost. **Those in your audience will see any display of temper as a sign of desperation, weakness, and frustration.** Let your opponents lose THEIR temper. **Whenever they get meaner, you get nicer.** You will come off as being reasonable, credible, and your audience will like you.

3 YOUR OPPONENT IS NOT YOUR ENEMY

Misguided? Perhaps. Ill-informed? Very likely. Naive? Sure. **But most people are well-intentioned and, like you, are doing what they truly believe will create a better world.** America is about a competition of ideas, and our founders risked everything to preserve it for us. You will build credibility with your audience, and maybe even make friends with your opponents, if you treat them as honorable but mistaken colleagues, rather than an “enemy to be slain by the sword of reason.”

4 YOU DON'T HAVE TO KNOW EVERYTHING

As much as we'd like to think so, we don't have all the answers. Who does? **If your opponent raises an issue you don't have a good answer for, don't try to fake, bluster, lie, or bluff your way out of it.** If your opponent makes an interesting point, it is alright to say so; state that you would like to think about it and discuss it later. This lets you to move on to the next point, buys you time to strengthen your position, and builds your credibility with others who will see you as reasonable and a good listener. **Even if you lose this debate, your opinion will carry more weight in the future. ABOVE ALL ELSE - if you use facts, and claim to know something, be SURE of the facts you cite.**

5 LOOK FOR COMMON VALUES OR OUTCOMES

A debates rarely comes to a constructive conclusion unless two sides can agree on outcomes they are both fighting for. Once two people can agree on desired values or outcomes, one can evaluate which approach promotes those values or outcomes best. For example, “cost” is a value established by debating “What is the least expensive way for us to maintain good roads?” Once this value is established, you have enough common ground for meaningful debate to take place. **Ask your opponent what values or outcomes they are trying to promote, and share the values or outcomes you are trying to promote with your opponent and your audience.** If you can agree on some of these, **you can win by simply showing that your approach is the best.**

6 FRAME THE DISCUSSION BY ESTABLISHING VALUES

If you are promoting the virtues of chocolate, would you rather frame the discussion in terms of **pleasure**: “Does chocolate bring joy to people,” or in terms of **harm**: “Does chocolate pose a health risk?” **As you can see, whomever is able to “frame a discussion” in this way usually wins the debate.** If you are not able to establish agreed values as discussed above, it is important to establish at least one value by first having a debate over what is to be achieved in the discussion.

7 PUT YOUR BEST ARGUMENTS FIRST

In journalism, there is a rule saying, “Don’t bury the lead!” **This means, do not bury your best arguments deep in your news article.** In debate, people sometimes do this with the intent of saving their knock-out blow for the end. This almost never works because leading with your weak arguments offers momentum to your opponent and you may lose your audience before you get to your strongest arguments. **Always put your best arguments at the top!**

8 THANK YOUR OPPONENT AND AUDIENCE FOR THEIR ATTENTION

This is really an extension of Debate Tool #2, “Always Be Nice... No Matter What!” as shown above. **Remember - no matter how obnoxious your opponent might be, he or she believed you were worth spending their time and energy on. And no matter who makes up your audience, they thought you were worth their time.** Thank them, and do it with sincerity no matter how pleasant or unpleasant they may have been. You will show yourself to be classy and will earn respect as a debater - even from your opponents.



Components Of A Campaign Plan

BY RICHARD P. BURKE

INTRODUCTION:

The purpose of this document is to provide a starting point for the development of a campaign plan. Details within campaign plans will vary widely depending on the race at issue, but all of the areas listed below should be incorporated in the plan. In addition to functioning as a working plan, the document can also be designed to teach important campaign workers about campaign plans, offer them an operational job description, and outline the thinking behind a campaign's strategy. The campaign plan should only be shared among trusted campaign workers.

1 CAMPAIGN OBJECTIVES

Obviously, the primary objective is to win the election. Secondary campaign objectives also exist such as raising a candidate's stature for future political endeavors or campaigns. Sometimes candidates may not win but advance to a runoff election. Sometimes a campaign can advance an issue, raise the stature of a ballot measure, force the diversion of resources, or use a campaign as a rallying point around which to grow local organizations.

2 DISTRICT OVERVIEW, ANALYSIS, AND CAMPAIGN STRATEGY

This section includes a brief analysis of the district based on voter registration, recent voting patterns, and the current political climate. Based on this information, the basic strategy is outlined.

3 APPROACHES TOWARD ACHIEVING OBJECTIVES

All major elements of the campaign will be discussed here. Each will be crafted to advance the campaign in accordance with the campaign strategy. Among them are issue identification, candidate positioning, branding, media strategies, voter outreach, volunteer deployment, voter identification, and voter turnout.

4 CAMPAIGN ORGANIZATION

This includes a list of campaign positions, their job descriptions, and organizational lines of responsibility. This will vary by the campaign, but examples include the candidate, a fundraising committee and chairperson, strategist (or consultant), campaign manager, scheduler, treasurer, campaign compliance consultant, media consultant, researcher, candidate assistant, Get Out The Vote (GOTV) committee and chairperson, and office manager.

5 IMPLEMENTATION WITH ROUGH CHRONOLOGY

This section includes key dates and a rough sequence of events. It is meant to provide a basic chronological structure for the campaign. A more detailed calendar built on this structure will develop with events. The Chronology should be planned in backward order from Election Day to the present day marking important deadlines, project time lines, and assigning responsibilities for specific tasks along the way.

6 CAMPAIGN BUDGET

This includes an overall budget and a summary of paid media costs. Some costs, such as contracts for key campaign team members, are not yet known and will be added into the budget as they are secured.

7 FUNDRAISING

Although the last section of this plan, this is the most important section because fundraising makes virtually everything else possible. While candidate fundraising should already be underway at this writing, this section will discuss fundraising by the candidate, staff, and tertiary means.



How To Circulate Initiative and Referendum Petitions: Oregon

BY RICHARD P. BURKE

INITIATIVES AND REFERENDA

Citizens in Oregon can propose and pass laws directly through what is called the “initiative process”. They also can effectively veto laws passed by the legislature and governor through what is called the “referenda process”. In both cases, questions are put to voters in an election provided enough support for them is demonstrated through signed petitions circulated among the electorate. Initiative and referenda may impact a small electoral district, a city, a county, or the entire state. We are envied by millions of activists.

This document gives you what you need to be an effective signature gatherer. Initiatives and Referenda represent real power for grass roots volunteers because they make us “citizen legislators” with the collective ability to trump the legislature, the governor, and even rewrite the Oregon constitution.

1 HOW DO I VOLUNTEER?

Unlike other activities, volunteering to gather signatures involves more than just saying “I volunteer”. Petition drives can be intense. A large number of signatures often need to be gathered very quickly, particularly as deadlines approach. **Above all, signatures must be gathered correctly to prevent them from being disqualified.** All of this requires a willingness to be trained and a bit of precision from you. Also, local coordinators responsible for signature drives in your area will need flexibility in how you are deployed to ensure that your time is not wasted.

2 TECHNICAL REQUIREMENTS

Oregon law has a variety of requirements that must be met when you are gathering signatures. If they are not met, many or all of the signatures you gather can be disqualified. Make sure your valuable time is not wasted by meeting all of these requirements:

1. Don't Share Sheets. Every petition sheet that can be signed by more than one person must be circulated and certified by one – and only one – individual. When circulating, NEVER allow your petition sheets out of your possession. Treat signature sheets as you would treat a large bag of money.

2. Witnessing and Other Issues. As a circulator, you must personally witness EACH signature being placed on your sheet. Each signor must be a

registered voter in the district of the petition (For a county petition, for example, signors must be registered to vote in that county. For a statewide petition, signors may be registered to vote anywhere in Oregon). No signor may knowingly sign the same petition more than once. You may not ask someone to sign if you know they are not qualified to do so. Each person must sign the petition themselves AND fill out the related information on the signature line such as their address, the current date, and their printed name. You may not correct or modify any of the information a signor places on a signature. If they make a mistake, set the sheet aside with a note and contact your captain or coordinator.

3. Dealing with Known Bad Signatures. If you discover an invalid signature on your petition sheet (For example if someone signs who is registered to vote in another state or if someone signs the sheet “Mickey Mouse”), draw a SINGLE LINE through the entry. This entry will not be counted by election officials and will not count against the effort. **DO NOT DO THIS UNLESS YOU ARE ABSOLUTELY SURE THE SIGNATURE IS INVALID.** If you are not sure, MARK THE SHEET WITH A POST-IT NOTE, give it to your coordinator, and start another sheet.

4. Certification, Errors and Turn-In. When you are finished gathering signatures on a petition sheet, you must certify that you witnessed each and every signature placed on the sheet. You do this by signing and dating the “Circulator Certification” line shown at the bottom of the sheet. **Do not vary your signature – certify each sheet by signing it in the same way you signed your voter registration form.** DO NOT sign the certification line before you are finished circulating the sheet - if you do, all signatures collected after you sign will be disqualified and any attempt to correct the date risks disqualification of the entire sheet.

If you find yourself in this position, make ANY errors, or don't know how to proceed, DO NOT CORRECT YOUR SHEET. STOP AND ASK FOR HELP. GET INSTRUCTIONS. Remember, you are making an investment in time when you collect signatures – make sure your effort is not wasted. If you decide you are done circulating a particular signature sheet, even if there are empty signature lines remaining, certify the sheet and give it to your captain or coordinator. Finally, do not make false statements or exaggerations to anyone who may sign the signature sheet. If a “spy” catches you doing this and there sometimes ARE spies,

you may have to deal with a nasty complaint and serious legal issues. Spies are usually volunteers associated with those opposing your efforts. They will sometimes try to cause you to make errors in hopes of lodging complaints and getting your signatures disqualified. On rare occasions, the Oregon Secretary of State has commissioned detectives to find and report errors in training and signature collection.

3 HOW TO GET SIGNATURES

When your coordinator gives you a signature gathering assignment, here is what you do to actually get signatures and have a great experience as well.

1. Equip Yourself. You will need a piece of cardboard or foam board slightly larger than the signature sheets as these work better than clipboards. You will also need some signature sheets and a couple of rubber bands to hold your sheets down from the wind. A hat can protect you from the sun. Wear comfortable shoes and weather appropriate clothing. Look neat and well groomed. Have extra pens on hand with black or blue ink - **do not use pencil.** If you are collecting signatures door-to-door, your coordinator must provide you with a “walking list” (a list of homes and the people who live there listed in order of street number) and possibly a map. **You must always have a copy of the initiative or referenda text on hand to be examined by any prospective signor upon request.** Often, but not always, this text is on the back of signature sheets. It can be helpful to bring someone with you to help carry things, keep you company, and find signature gathering opportunities.

2. Remember, You Are a Volunteer. Signature sheets will say that you are a volunteer, so you cannot accept compensation for gathering signatures on these sheets. **Do not attempt to buy, sell, or trade signature sheets.** If you are an employer, you may not ask employees to circulate signature sheets while on the job unless they are registered with the state as paid signature gatherers and are using different petition sheets. Employees may distribute blank petition signature sheets on the job for other people to circulate.

3. Remember Your Rights. You have the right to gather signatures on public property open to public traffic and private property with the permission of the owner. You do not have the right to obstruct or interfere with the public use of the property. When questions related to these issues arise while you are collecting signatures, open yourself to compromises that preserve your ability to collect signatures efficiently within your time frame. **If you cannot resolve these issues agreeably, call your coordinator and ask for help.** Remember, this is not the venue to spend hours debating your rights with public officials - let your coordinators do that. This is a time to focus on collecting valid signatures on your sheets quickly.

4. Make the “Ask”. Each person who gathers signatures on petitions will have their own style of approaching potential signors. Be yourself, but be assertive - people will not sign your petition unless you ask them to. **Do not think of yourself as intruding on peoples’ lives - know that you are providing a service. After all, civic involvement is a part of everyone’s life. You are offering people a chance to exercise their power without going out of their way.**

Begin by making sure your prospect is registered to vote in the district effected by the petition (*for statewide measures, voters may be registered anywhere in Oregon*). If you are not gathering signatures door-to-door, a good opening line is simply, “Are you registered to vote?” If the answer is “NO”, you won’t waste any time. If the answer is “YES,” you have opened a dialogue. Tell your prospect you are a volunteer gathering signatures for a petition that would _____. Because you are a volunteer, some people will be more open than they would be with a paid signature gatherer.

Try to engage your prospect in a BRIEF discussion about what your petition would do. You don’t want to spend too much time on any single signature prospect. Be sure that everything you say is accurate. Do not exaggerate or embellish anything. Do not go into much detail; this is where errors can be made in explaining issue. **Finally, ask them to sign the petition if they have not already signed it elsewhere.** When they sign the petition, make sure you witness them doing it. **GOOD JOB!** Now go get another one. When you are finished working with each signature sheet or if it is filled with signatures, be sure to certify the sheet as described above. When you have done this, turn in all of your completed petition sheets to your coordinator.



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INITIATIVES AND REFERENDA

Citizens in Washington have the right to propose and pass laws directly, or pass them through the state legislature through what is called the “initiative process”. They also can effectively veto laws passed by the legislature and governor through what is called the “referenda process”. In all cases, political support is demonstrated through petitions signed by qualified voters. Initiative and referenda may impact a small electoral district, a city, a county, or the entire state. We are envied by millions of activists who do not have this power.

This document gives you information that will help you correctly gather signatures on initiative and referendum petitions. Initiatives and Referenda represent real power for grass roots activists because they make us “citizen legislators” with the collective ability to trump the legislature, the governor, and even rewrite the state constitution in some cases.

1 HOW DO I VOLUNTEER?

Unlike other activities, volunteering to gather signatures involves more than just saying “I volunteer”. Petition drives can be intense. A large number of signatures often need to be gathered very quickly, particularly as deadlines approach. **Above all, signatures must be gathered correctly to prevent them from being disqualified.** All of this requires a willingness to be trained and a bit of precision from you. Also, local coordinators responsible for signature drives in your area will need flexibility in how you are deployed to ensure that your time is not wasted.

2 TECHNICAL REQUIREMENTS

The state has standards for what constitutes a valid signature, and all of these standards must be met when you circulate petitions. If they are not met, some or all of your signatures could be disqualified. Make sure your valuable time is not wasted by meeting all of these standards:

1. Don't Share Sheets. Every petition sheet that can be signed by more than one person must be circulated and certified by one – and only one – individual. When circulating, NEVER allow your petition sheets out of your possession. Treat signature sheets as you would treat a large bag of money. Don't let other people collect signatures for you – get them signature sheets of their own.

2. Witnessing and Other Issues. As a circulator, you must personally witness EACH signature being placed on your sheet. Each signor must be a registered voter in the district of the petition (*For a county petition, for example, signors must be registered to vote in that county. For a statewide petition, signors may be registered to vote anywhere in Oregon*). No signor may knowingly sign the same petition more than once. You may not ask someone to sign if you know they are not qualified to do so. Each person must sign the petition themselves AND fill out the related information on their signature line. You may not correct or modify any of the information a signor places on a signature. If they make a mistake, set the sheet aside with a note and contact your captain or coordinator.

3. Dealing with Known Bad Signatures. If you discover an invalid signature on your petition sheet (*For example if someone signs who is registered to vote in another state or if someone signs the sheet “Mickey Mouse”*), draw a SINGLE LINE through the entry. This entry will not be counted by election officials and will not count against your effort. DO NOT DO THIS UNLESS YOU ARE ABSOLUTELY SURE THE SIGNATURE IS INVALID. If you are not sure, MARK THE SHEET WITH A POST-IT NOTE, give it to your coordinator, and start another sheet.

4. Certification, Errors and Turn-In. When you are finished gathering signatures on a petition sheet, Be sure to certify that you witnessed each and every signature placed on the sheet. You do this by filling out and signing the circulator certification section on the back of the petition sheet. DO NOT place your signature on the certification before you are finished circulating the sheet.

5. Errors. If you make ANY errors, or don't know how to proceed in a given situation, DO NOT TRY TO CORRECT YOUR ERRORS. Set the sheet aside, put a post-it on the sheet documenting the problem, and start collecting on a new sheet. Seek advice from the campaign how to handle sheets with errors or possible errors. Remember, you are making an investment in time when you collect signatures – make sure your time isn't wasted. If you decide you are done circulating a particular signature sheet, even if there are empty signature lines remaining, certify the sheet and give it to your coordinator or mail it in. If you follow these guidelines you will be fine. Sometimes, though not often, opposing campaigns will send people around who will try to induce you to make a mistake. They

will try to cause you to make errors in hopes of lodging complaints hoping to get your signatures disqualified. They may say things like, “I think I’ve signed this already. Can I sign again? [The answer would be NO] But if you stick to these guidelines and take care of your sheets, you will be fine.

3 HOW TO GET SIGNATURES

When your coordinator gives you a signature gathering assignment, here is how to get a lot of signatures and have a great experience as well.

1. Equip Yourself. You will need a piece of cardboard or foam board slightly larger than the signature sheets. These work better than clipboards and are more comfortable. You will also need some signature sheets and a couple of rubber bands to hold your sheets down from the wind. A hat can protect you from the sun. Wear comfortable shoes and weather appropriate clothing. Look neat and well groomed. Have extra pens on hand with black or blue ink - **do not use pencil**. If you are collecting signatures door-to-door, your coordinator must provide you with a “walking list” (a list of homes and the people who live there listed in order of street number) and possibly a map. **You must always have a copy of the initiative or referendum text on hand to be examined by any prospective signor upon request.** Often, but not always, this text is included on the signature sheets. It can be helpful to bring someone with you to help carry things, keep you company, and find signature gathering opportunities. If a patient young child is willing to go with you, he or she can socially disarm folks who otherwise would not talk to you.

2. Remember, You Are a Volunteer. Do not attempt to buy, sell, or trade signature sheets. Do not offer potential signors anything of value in exchange for their signatures. If you are an employer, you may not ask employees to circulate signature sheets as a condition of their employment or else they could be regarded as professional signature gatherers and be subject to another set of standards. Employees may offer customers the opportunity to sign petitions, but must adhere to the signature gathering standards described here.

3. Remember Your Rights. You have the right to gather signatures, on public property open to public traffic and private property with the permission of the owner. You do not have the right to obstruct or interfere with the public use of the property. When questions related to these issues arise while you are collecting signatures, open yourself to compromises that preserve your ability to collect signatures efficiently within your time frame. **If you cannot resolve these issues agreeably, call your coordinator and ask for help.** Remember, this is not the venue to spend hours debating your rights with public officials - let your coordinators do that. This is a time to focus on collecting valid signatures on your sheets quickly. Post offices are generally off-limits.

4. Make the “Ask”. Each person who circulates petitions will have their own style of approaching potential signors. Be yourself, but be assertive - people will not sign your petition unless you ask them to. **Do not think of yourself as intruding on peoples’ lives. You are providing an important service. After all, you are offering people a chance to exercise their franchise without even going out of their way.**

Begin by making sure your prospect is registered to vote in the district effected by the petition (for statewide measures, voters may be registered anywhere in the state). If you are not gathering signatures door-to-door, a good opening line is simply, “Are you a registered Washington voter?” If the answer is “NO”, you won’t waste any time. If the answer is “YES,” you have opened a dialogue. Tell your prospect you are a volunteer gathering signatures for a petition that would (insert one line description here).

Try to engage your prospect in a BRIEF discussion about what your petition would do. You don’t want to spend too much time on any single signature prospect. Be sure that everything you say is accurate. Do not exaggerate or embellish anything. Minimize discussion of initiative details - that is for the campaign to come.

Finally, ask them to sign the petition if they have not already signed it elsewhere. When they sign the petition, make sure you witness them doing it. **GOOD JOB!** Now go get another one. When you are finished working with each signature sheet or if it is filled with signatures, be sure to certify the sheet as described above. When you have done this, turn in all of your completed petition sheets to your coordinator.



The Care and Feeding of Good Volunteers

BY RICHARD P. BURKE

“I volunteer!” Those two words are guaranteed to bring a smile to any candidate. Campaigns have historically been powered by volunteers and the spirit they bring to a campaign.

But the words “I volunteer” merely begin the process. After that first rush of enthusiasm dissipates, candidates and campaign workers notice that some volunteers become less reliable.

How can we change that? According to Dr. Peter M. Sandman (a professor at Rutgers University) the secret is to **focus on the needs of the volunteers as much or more than the needs of your campaign.**

In the late 1980s, Dr. Sandman was a volunteer coordinator for the Nuclear Freeze movement, and wrote an article entitled, “Holding Your Volunteers.” His advice applies not just to the Freeze movement, but to any group that relies on volunteer support.

Sandman wrote: “I want to list for you the 12 most common reasons why volunteers quit their organizations — or, more often, simply disappear.

Most of the 12 can be dealt with **if** we are paying attention to organizational maintenance. None of the 12 reasons for quitting, by the way, is people changing their minds about the issues. Note also that none of the 12 reasons is ‘not enough time,’ which is what many former volunteers will tell you if you ask why they left. Their day didn’t get shorter, after all; they just decided to reallocate the part of it that used to go to [you].”

Instead, noted Sandman, volunteers leave because the volunteer work “no longer satisfies their own needs. Holding volunteers, in other words, is more a matter of maintaining their joy than of maintaining their conviction.” Here are Dr. Sandman’s 12 reasons (slightly edited):

1 BURN OUT

People often quit organizations when they are asked to do too much too fast. We are all familiar with the phenomenon: A newcomer at the March meeting speaks up at the April meeting, is appointed committee chair at the May meeting, and doesn’t show for the June meeting. To avoid burn out, we should try to offer volunteers a series of slowly increasing responsibilities.

2 COOL OUT

The opposite of asking people to do too much too fast is not asking them to do anything at all. In many groups this is the number one reason for leaving: No one invited

me to the workshop, no one asked me to help with the [neighborhood] canvass, no one told me they needed me. The solution to “cool out” is straightforward. Don’t be diffident about asking, and don’t lose track of people. Be especially careful to touch base with volunteers who missed the last meeting, so the lack of a role doesn’t become a reason to miss the next one as well.

3 KEEP OUT

People who know each other inevitably gravitate to each other at gatherings, especially when we’ve been through tough times together, or when we have work to transact and gossip to transmit. This leaves newcomers sitting painfully alone, watching the inner circle and pondering the invisible “Keep Out” signs we didn’t mean to post. You can’t stop the formation of cliques, and you can’t stop wanting time with your friends. But you can consciously reach out to newcomers. In larger groups you can even institutionalize a buddy system. Pair each newcomer with another newcomer to compare notes with, and with an old-timer to go to for basic information.

4 PULL OUT

Newcomers may become pillars of a campaign organization, but they don’t want to feel that they must. That is, people are more likely to participate when the extent of their participation is not disruptive to their lives. Organizational commitments are like personal commitments in this way: No one likes to feel trapped, and so the sense that a person or group is clutching desperately provokes a strong impulse to escape while there’s still time. Part of the solution is to project desire but not desperation. The rest of it is to let the volunteer control the commitment; when a volunteer sets explicit limits (“I don’t want to sell tickets to the lasagna dinner”), respect them.

5 CAN’T WIN

Nothing scares volunteers away faster than the sense of futility — either the feeling that the work is doomed to defeat or the feeling that the goals are unclear, that defeat and victory hardly apply. To forestall this “can’t win” feeling, try to build instead a sense of efficacy, a sense that the goals are worth achieving, that the group can achieve them, and that the volunteer is contributing significantly to their achievement. This means defining explicit short-term objectives as well as the long-

term vision, and it means making a fuss each time an objective is achieved. Don't let people go out on an afternoon canvass without a standard of how many homes, signatures, and dollars represent a successful afternoon — and don't let them go home afterward without crowing over the success.

6 CAN'T LOSE

As many front-running political candidates have learned to their dismay, working for a sure thing strikes most people as just as pointless as working for a futile long shot. For purposes of volunteer morale, the ideal probability of success is about 40%: We're a little behind but with your help we're going to pull into the lead. Be especially alert for the anticlimax that follows a victory. You need to celebrate the success, of course, but be sure to connect it in advance to the next step and the step after that, so the pause to celebrate is always following by a reason to keep working.

7 NO GROWTH

Alienated labor is bad enough when you're paid for it; it's intolerable when you're not. Volunteer work should be interesting; it should offer variety, change, a chance for personal growth. There is boring work to be done, of course. But spread it around (officers too); make it fun where you can; and alternate it with more interesting work, volunteer training, and other plums. Note, however, that boredom is in the eye of the beholder. Some of your volunteers may prefer the conviviality of an envelope-stuffing party to the tension of a congressional lobbying visit. But most do not; though they may not complain (until they quit), they expect a chance to grow. Look around for volunteers who may be in a no-growth rut, and offer them a spicy new challenge.

8 NO APPRECIATION

Volunteers don't just enjoy being appreciated. They need it (without it they tend to lose faith in the value of what they're doing) and they deserve it. At a minimum, appreciating volunteers has three components. The most obvious is "thank you" - We are grateful for what you have done. But just as important — and far more often neglected — is "please": We are not taking for granted that you will do more. And perhaps the most crucial aspect of appreciation is meticulous attention to logistics: Returning phone calls, answering notes, passing along information, scheduling meetings at times the volunteer can make. Organizations that really know how to appreciate volunteers — the American Cancer Society comes to mind — use everything from newsletters to awards banquets to endless desktop pen sets to make the point.

9 EXTERNAL OPPOSITION

If family and friends are opposed to a volunteer's volunteering, odds are you'll eventually lose that volunteer. The obvious solution is to avoid external opposition in the first place. Family and friends are in a real sense "contributing" some of their time with the volunteer; find ways and occasions to thank them. Better still, lessen the contribution by involving them directly. Even family members who do not want to volunteer themselves may still want to meet the people and get a sense of what goes on during all those [volunteer] hours. And think about external opposition that rises out of skepticism about the cause rather than resentment of the competition. Involvement is the best way to cope with this, too, but second best is to make sure volunteers bring home a steady stream of "ammunition" demonstrating the wisdom and effectiveness of [your organization's] work.

10 EXTERNAL CONFLICT

Personality conflicts, tensions, and even quarrels may be acceptable at home or at a paying job, but not at a volunteer job — especially not a political one. Part of the problem is imagining that people who share political values are always going to like each other. Part of the solution is accepting that we may not like each other. Once the conflict is acknowledged, the rest of the solution depends on the style of your group. Some groups mediate the battle, some encourage the battlers to duke it out, some urge them to make up, and some reorganize the work so they won't have to deal with each other so much.

11 POLICY DISAGREEMENTS

Sometimes — though less often than we image — the conflict is genuinely over policies rather than personalities. A consensus decision-making process will help here. Though it takes forever, it leads to better decisions, and unlike voting it doesn't produce disgruntled minorities. Even if your group decides things by vote or by fiat, the crucial need is to listen to the losing side. Volunteers who quite over a policy disagreement almost always report that the majority (or the chair) didn't understand their position. If you can summarize the minority viewpoint accurately and respectfully, the minority will usually accept the decision. A corollary is that volunteers who weren't present when a decision was made are the ones most likely to see it as grounds for quitting, so try to make key decisions when the dissidents are there to express their dissent.

12 NOT ENOUGH FUN

Yes, of course [achieving your political goals] is serious work. But we mere humans need parties and picnics and softball teams. "If I can't dance, I don't want to be part of your revolution."



Effective Campaigning With Little or No Money

BY RICHARD P. BURKE

DON'T LET THE PUNDITS ON TV FOOL YOU: Old-fashioned hard work pays off!

Campaigns are more sophisticated, but don't be intimidated! With improved polling, micro-targeting, and other technologies, political professionals keep coming up with new ways to win people over, or at least manipulate them. But no matter what they come up with, **NOTHING** will take the place of a good ground campaign and elbow grease. This unit will offer proven and effective ways of doing the fundamental campaign work that lies at the heart of winning races.

Not every example here will be right for you or your group. You may come up with ideas of your own not shown here. But whatever you do, develop a written plan, preferably with a calendar assign responsibility to someone for each activity you undertake. Make sure someone follows up.

1 LETTERS TO THE EDITOR

These still work – don't ignore them! Send letters on a consistent basis. First, tell the reader what you want them to do. Second, provide a reason why the reader should do what you want. Third, offer a personal comment demonstrating why you are taking the stand that you are. Finally, repeat what you want the reader to do. Keep it **VERY** short.

2 "DESKTOP ACTIVISM"

Facebook, Twitter, blogs, email lists, and other Internet outlets are great for getting your message out. You can be sure that your opponent will be using them. When you see posts of news stories, leave comments favorable to the candidates and ballot measures you support. Take issue with those who support your opponents!

3 CALL TALK RADIO SHOWS

Don't limit yourself to major statewide talk shows. Call into talk shows offered on smaller stations. Call "Trading Post" type shows, even if you have nothing to sell, and shows where people are allowed "thirty seconds of fame." While larger stations may not offer such opportunities, struggling small stations do. Their audiences are smaller, but they vote! Refer to WLN Academy units on the media.

4 BULLETIN BOARD CAMPAIGN

Grocery stores, laundromats, bus stops, laundry areas at apartment complexes, and other such places provide "Community Bulletin Boards" where people can post event information, business cards and so on. You can post campaign materials on these boards. Management may take them down, but people will see them first!

5 LOBBYING LOCAL AND LEGISLATIVE OFFICE HOLDERS

Prevail upon your elected local, county, and legislative leaders to make strong public statements in support of the campaigns you support. Refer to the WLN Academy units on lobbying. If the issue is sensitive, assure the local official that he or she will have the support of you and your friends. If the official refuses, ask why – you will learn a lot about that official from their answers.

6 HOLD A VOTER REGISTRATION DRIVE

You or a group you are affiliated with can secure booths at county fairs, gun shows, food festivals, or other exhibitions where you can offer to register people to vote. As they register, you can familiarize them with the positions, candidates, and ballot measures you support. You will find allies along the way to help in future campaigns!

7 TESTIMONY TO PUBLIC BOARDS

You can testify to public boards such as city councils and school boards during their “Open Communication” segments, where people can testify on any matter not on the meeting agenda. Emphasis should be placed on meetings where local newspaper reporters will be present or meetings covered by public access television. Better yet, inform newspapers in advance of your intent to testify on a particular campaign.

8 DIRECT VOTER OUTREACH

You can do things on your own or you can coordinate with a group or a professional campaign. If you want to work with a group but one is not available, form one and coordinate with the campaigns you support.

a. Door to Door. Distributed literature or just shake hands with people going door-to-door. Do not get involved in long discussions or any arguments - you want to hit as many doors as you can. Dress neatly, and use sidewalks. Bring someone with you if you can. Wear a campaign button if one is available. Work at reasonable times. Do not litter or put literature in mailboxes or newspaper delivery boxes. Keep presentations short.

b. Phone Banking. If there is a funded campaign associated with your effort, you can volunteer to take part in phone banks. If not, you can call your friends or neighbors. You may wish to work with others in your group or with campaign representatives to come up with a script, but try to present it in your own words. Can't get to the phone bank headquarters? No problem... get a list from them and use your own phone.

c. Get Out the Vote (GOTV). A lot of winnable elections have been lost simply because campaigns simply failed to get their supporters to vote! In any case, if there is no GOTV effort behind a campaign you support, do one of your own! See WLN training materials on personal and “desktop” GOTV projects. You can do a lot with very little!

9 TOWN HALL MEETINGS AND RETIREMENT CENTER PRESENTATIONS

Your group can hold a town hall style meeting or an open house where people can talk to members about the races you want to focus on. Perhaps you can organize a debate or a forum for your candidate. You might also want to make presentations to retirement centers. The elderly vote with high reliability, and the social managers of retirement centers are always looking for meeting content.

10 SUBMIT A VOTER PAMPHLET ARGUMENT

You, either alone or with a group of friends, could raise a limited amount of money to publish a Voter Pamphlet statement for or against a ballot measure. This is a good way for groups to do community outreach and increase membership. You will have to raise a few dollars, but there is no less expensive way to reach every voter in a particular electoral district! No money? It is often possible to get your Voter Pamphlet argument published by collecting a few signatures!

11 SIGN CAMPAIGNS

Signs or posters can be produced to be placed in the windows of businesses. If large field signs are available from a big-dollar campaign on your side, it may be possible to find high-visibility locations for them. Lawn signs can be a key component to any sign campaign. Friends and other activists can be asked to put up signs in their yards, find other locations to put up lawn signs, and pick up signs when the campaign is over. It may be possible for you to coordinate with a professional campaign. As election day approaches, you and your friends can hold signs over bridges and at well-traveled intersections.

12 HOLD AN ELECTION NIGHT PARTY

Victory parties give a sense of closure, accomplishment, and camaraderie. They can cement relationships built during a campaign and can provide a venue to come up with ideas about what to do next. They allow volunteers to share a common experience and compare notes in an informal environment. They offer a venue for your group to gain favorable media coverage, raising your group's profile thereby making it easier to recruit new members.



Dealing With The Media: Do and Don't

BY RICHARD P. BURKE

Yes, most of the broadcast and social media outlets are biased toward the left. Sometimes their memories will be selective. Sometimes they will be unfair.

Fortunately, there are things you can do to increase the odds that you will be treated fairly by reporters, editors, and bloggers. Follow these pointers, and you will be able to navigate these waters more successfully.

1 REMEMBER MOST LOCAL REPORTERS ARE JUST TRYING TO GET THROUGH THEIR DAY

Most reporters are almost always stressed, writing four or five stories against a hard deadline. Believe it or not, most local reporters only have two real concerns:

- a. When will they be able to finish their day and go home and,
- b. How can they complete their work and avoid getting fired. It is THAT simple.

Most reporters may be liberal, but they are not are not crazy TV personalities. Most of them are young, inexperienced, overworked, underpaid, and are anxious as they know they are in a dying profession. If you can make it easier for them to get through their day and look competent to their boss, they will value you as a source and tread you better.

2 KNOW WHO TO TALK TO

Do not assume the editorial page department is connected to the news department. At most newspapers, they have nothing to do with each other, so feeding your news-related releases to the Editorial Page doesn't help. Find out who needs your press releases, who covers the news beat for the races you are working on, who the editors are, and who needs photographs. They are almost always different people. If you learn who these people are you will not waste your time or theirs and you will be more influential as a source.

3 MAKE SURE EVERYTHING YOU SEND MEDIA OUTLETS IS TYPED AND LOOKS PROFESSIONAL

Believe it or not, people still submit hand-written press releases and letters to reporters and editors. Unfair as it might be, handwritten releases don't get top priority. The people who have to type them in dislike having to decipher.

4 GET GOOD PHOTOGRAPHS

If you are a candidate or group leader, have nice color and black-and-white photos made of yourself. Have glossy 5" x 7" photos and digital versions available. A decent quality publicity photo lends credibility. If a newspaper wants to publish a photo of you as a local leader, having a prepared photograph lets you control your image. If you rely on a news photographer to take your picture, or force a reporter to find one on the Internet, the photo used might not present you at your best.

5 HAVE A SOCIAL MEDIA PRESENCE

If you are a candidate or a group leader, it is important to maintain a website or basic social media pages you can refer reporters to. These sites should have photos reporters can download, videos they can link to, and any other information you would like reporters to see when they come to your sites.

6 BE ACCESSIBLE

Reporters will often quote the person they can reach first. If they call you, answer immediately. If they don't reach you and leave a message, get back to them immediately. Always be available for interviews. If you develop a reputation as a news source who is easy to reach, reporters will start calling you first.

7 DON'T ALIENATE REPORTERS

Remember that reporters are stressed, fighting to meet deadlines, and are usually more concerned about finishing their day and not getting fired than anything else. Reporters will take calls asking legitimate questions or announcing real news, but anything less gets bothersome to them even if it is critically important to you. Though sometimes unfair, if you start to be thought of as a pest, you will be marginalized. If they screw up, don't scold them. Even if you are right, you won't win the day.

8 BE PATIENT WITH REPORTERS

During an interview, reporters will sometimes mix up who you are, spell or pronounce your name wrong, get confused about which campaign or issue you are working on, or mess-up some other detail.

8 BE PATIENT WITH REPORTERS (CONT)

Remember that the same reporter probably is covering five or six other stories, each with two or three people offering their views, many of whom he or she likely spoke with just hours or minutes before speaking with you. When reporters make mistakes, be patient, do not assume they are messing with you, and do your best to patiently and calmly correct them.

If the mistake they make is insignificant, it is sometimes best to let it go. Remember, if you make their job easier, they will almost always treat you and your story with more professionalism and objectivity.

9 DON'T TRY TO DANCE WITH THE FACTS

Never try to “B.S.”, trick, dazzle, impress or otherwise belittle the reporter. Be your best self, talking to someone struggling trying to do a complex job well. Speak clearly and directly. Reporters usually are not trying to unearth some terrible secret when they interview you; they just want good, concise answers.

That said, if a reporter does ask hard questions, remember that's part of his job, too. If you don't know the answer to a question, be honest about it. Tell them you don't know, have not thought about it before, or some other answer and that you will get back to them – then get back to them quickly.

10 DON'T MAKE ASSUMPTIONS ABOUT THE POLITICAL PERSUASIONS OF THE NEW DEPARTMENT(S) OR INDIVIDUAL REPORTERS

Editorial page departments are supposed to have a political bias. But news departments aim to remain as neutral as possible (or claim to). Individual reporters can and do belong to political parties, but they aren't supposed to favor one view over another.

As many have seen, bias often creeps into what are supposed to be objective news stories. But avoid making assumptions about the leanings of the reporters you talk to. Occasionally, you will speak to one that agrees with your world view. Sometimes, though the reporter does not agree with your world view, they will agree with you on a particular issue or may acknowledge the legitimacy of particular arguments being advanced by the project or campaign you are working on.

Conclusion. Following these pointers will not guarantee favorable or even fair news coverage or your campaign or project by reporters and bloggers. They will, however, assure that you will be treated more fairly than if you do not observe them. If you practice these pointers consistently, over time, you will find that you will be treated more seriously. You will also become a regularly consulted source for stressed-out reporters who need information or quotes quickly from a person who has your perspective to round out a story.



How To Get Out The Vote (GOTV)

BY RICHARD P. BURKE

INTRODUCTION:

“Get Out The Vote” (GOTV) operations often determine whether campaigns win or lose, especially where local campaigns are concerned. While there are many things during a political campaign that candidates cannot control, they can help themselves with a strong GOTV effort. Likewise, individual activists can undertake their own GOTV projects to help the candidates and ballot measures they support. No matter what your campaign budget is (even if it is \$0), or what your strategy might be during the days before an election, it is critical that every single campaign carefully plans and executes a serious GOTV operation.

1 THE PSYCHOLOGY OF GETTING PEOPLE TO VOTE

A 2012 Stanford University study found that people become much more likely to vote in any given election **if they see voting as a part of their personal identity and if they have a specific plan about when and where they will vote.**

Keep this in mind whether you are an activist undertaking a personal or “desktop” GOTV project, or if you are working as a campaign volunteer as part of a professional campaign.

Though you will want to adapt the message for different situations, you could say something like, *“Jill, you’ve been a conservative most of your life. It is important that you stand for your values now by making sure you vote.”* This statement ties a person’s identity with the civic act of voting. Include a question like, *“When do you plan to vote or mail in your ballot?”* This forces people to consider a basic plan about when they will vote or at least plants the idea in their minds.

Live GOTV appeals are best - when you look someone in the eye and ask them to commit to voting, you will have the most success. Phone appeals, while interactive and also effective, are not as successful as live appeals. Email, robo-calls, and social media appeals are not as effective as live or telephone appeals, but are still effective and are certainly better than nothing. Keep this in mind as you formulate your GOTV plan.

2 COLLECT, ORGANIZE, AND PRIORITIZE YOUR VOTER INFORMATION

If you are undertaking a “desktop” or personal GOTV project, start with a list showing all the individuals and groups you plan to contact, how you will contact them, and when you will contact them. You will reach some over the phone. You will reach some through social media. Perhaps you will want to reach out to a service club, community group, business or church group, or bridge club you belong to. It’s all good.

If you are working on a campaign, get a list of all voters in your district from the relevant state or county officials. You may also want to get information available online from the U.S. Census Bureau about demographic information associated with your district. Once you have the this information, prioritize voters according to how often they vote and by other metrics (like party affiliation, income, or education level) that you think are important. As needed, volunteers can look up phone numbers and find email addresses where they are missing. The goal is to make sure that voters generally inclined to vote, and those who are likely inclined to vote your way make it to the top of your GOTV list.

3 PREPARE YOUR MESSAGING

If you are undertaking a personal or “desktop” GOTV project, consider what you will say to your contacts before you contact them. Write it down. Are there hot-button issues that will motivate your contacts? Is the political environment competitive? Whatever you think will motivate individual or groups of voters should be added to your contact list. As mentioned before, you will want to say something that connects the act of voting to their personal identity and a request for them to commit to a specific voting plan.

As you develop your message, you may want to contact one or more of the campaigns you support to see if they have tested any messaging they know will motivate voters. Be sure that you also include important information such as when voter registrations must be updated, when mail-in or absentee ballots must be mailed, and where ballot drop boxes are located.

3 PREPARE YOUR MESSAGING (CONT)

Example:

"Hello, Jane! I'm calling to encourage everyone I know to vote in the upcoming November 5th election. I know you have been a conservative most of your life and hope you can be counted on to stand for your values now. Joe Blow is running in a close race for the state legislature and we all want Ballot Measure Z to be defeated, right? Have you received your ballot? If you plan to mail it, you should do so before November 3rd to make sure it arrives on time. When do you plan to cast your vote? I have a list of ballot drop locations if you need it. Do you need any help? Thanks!"

4 GET TO WORK

Sometimes, the hardest part of a personal or "desktop" efforts is just getting started. Set an appointment to start. Design and commit to a specific plan to work on GOTV a few hours per day. Take notes as you go you can use to determine who you will need to follow-up with, who may need assistance because of disabilities or some other reason, and who may have skills and interests that may be helpful in future campaigns.

If you are coordinating with a professional campaign, it may be able to give you daily information about who has voted and who has not. You can use this information to avoid wasting time following up with voters who have already voted. After the election, this information can also provide you with valuable feedback on how effective your GOTV plan was. If you are not working with a professional campaign, you may still be able to get this information from county or state election offices.

CONCLUSION:

The history of big elections is rife with examples of campaigns decided by only a few votes. In smaller elections, a few more votes here and there can be even more decisive. Individual or "desktop" GOTV projects can literally put activists in the position of determining the outcome of elections, particularly close races and local races. GOTV work is among the most powerful tools that can be in an activist's toolbox. The connections you make along the way will serve to elevate your reputation as an opinion leader and as an effective activist. As you build this reputation and your personal relationships, you will also have a lot of fun!



Developing Your Personal Media Campaign

BY RICHARD P. BURKE

INTRODUCTION:

From the comfort of your home, you can advance the campaigns you support using free media outlets. **Examples include letters to the editor, radio call-in shows, and social media platforms like Facebook and Twitter.** Newspapers readers, listeners of talk-radio, and politically active social media users are all high-percentage voters, the very people you will want to reach.

This document will help you to develop and execute a personal media campaign. Following the guidelines shown here will increase the odds that your message will actually get out. You may also find that these basic guidelines can also be applied or adapted to any venue or medium which accepts comment from the public.

1 MAKE A LIST OF MEDIA CONTACTS

Go the websites of area newspapers and find out how to submit letters to the editor. Most newspapers have specific requirements including word counts and information about how they can reach you. Check out talk radio station websites and find out the call-in phone numbers and times of shows you can call into. On social media, check out groups and chat rooms you think are dominated by persuadable people who vote. If you follow specific blogs, get their web addresses. **Compile all of this information into a written list you can use as you execute your personal media campaign.** You can also share this list with friends to help them develop personal media campaigns of their own.

2 USE THIS "FOUR POINT" METHOD TO DEVELOP SHORT MESSAGES

Short messages are far more likely to get make it to your target audience than long ones. In any medium, short messages are more likely to actually be read or heard and offer fewer opportunities for opponents to challenge. For your personal media campaign, develop your message by using the "Four Point Method" shown here:

a. Explain the Purpose of Your Letter. Get right to the point. The first line of your letter should say something like, *"Dear Editor, I write this letter in support of Jane Doe for Position 3 on the Anytown School Board in the upcoming local election on May 16th."* That's it. Boom!

b. Say Why You Support Your Position. Your next sentences should suggest a personal connection with the candidate. For example, *"I have known Jane Doe for ten years. She is a woman of integrity who has the good of our community at heart."* **Express ONE main idea only.** If there are more reasons to support Jane Doe, have other people express them in separate messages. **Use no more than one, two, but no more than three sentences. In this case, less is more!**

c. Close the Sale. The last sentence closes the sale by saying something like, *"For this reason, I hope you will join me in supporting Jane Doe for Position 3 on the Anytown School Board - Election Day is May 16."* Yes, it is a repetition of the first line. Drive the point home!

d. Tell Them Who You Are and Why You Matter. As appropriate for each media outlet, provide your name, address, email address, and contact phone numbers. Newspapers and some blogs require this information.

If you can, use a title of some kind. If you are a public office holder, member of a civic organization, member of a neighborhood organization, or almost anything else, a title lends credibility to your letter by showing you are connected and active in your community. For example, one could sign the letter, *"Sincerely, John Doe, Member, Anytown Elk's Lodge #9999, 123 Oak Street, Anytown, OR 99999, 555-555-5555, johndoe@johndoe.com."*

IMPORTANT: If you offer any kind of title related to an official body or group, you need to make clear that you are representing only yourself rather than the group or body you are referencing. One way you can do this by placing the words, *"Speaking for myself,"* at the very top of the letter. There are other ways to do this, but it is important not to imply that the group you are a member has endorsed your position unless they actually have.

3 BUILD AND DEPLOY A PERSONAL MEDIA CAMPAIGN TEAM

Get as many friends and supporters as you can to develop personal media campaign plans like you agree to submit letters to the editor on your behalf. Provide copies of this document to your politically active friends and coordinate messaging with them. Doing this will multiply your impact.

In the case of letters to the editor, you can type letters to be signed and submitted by your friends who are too busy to write letters of their own. **After all, while friends and supporters may have the best of intentions, people get busy and follow-through can be a problem.** Getting them to sign letters in advance offers them a way to help you without imposing on them too much. Be sure to vary the tone of each so their authenticity is not questioned.

4 DON'T GO NEGATIVE

We see negative campaigning all the time. Professionally done, negative campaign tactics can help high-visibility campaigns. **But remember – voters generally do not respond well to negative campaign tactics when it comes to local campaigns and ballot measures.** Most voters understand that local positions are usually unpaid and are undertaken by people who genuinely want to contribute to their communities. I was once challenged for my seat on a water district board of commissioners by a challenger who spent over \$12,000 on a negative campaign. It backfired big time (I spent \$0 and got over 60 percent of the vote and several endorsements). Do your best to keep your messaging positive in tone.

5 PACE YOUR PERSONAL MEDIA CAMPAIGN

Using a calendar from Election Day backward to today, plan your personal media campaign. Using the information on the media list you compiled, decide how many letters to submit to each local publication, when, and how often. Decide how often you will express your message on talk radio and social media. If you acquired signed letters to the editor in advance from your friends, submit them in a coordinated way. If you are relying on people to submit their own letters, have a plan to assure follow-through. **Remember to pace yourself and involve others if you can.** Editors and talk radio producers will get annoyed if they receive a constant bombardment of letters and calls from one person.

NOTE:

Following the suggestions in this document will not ensure that your letters and blogs will be published or that your call will be put on the air. But a personal media campaign can make the difference between victory and defeat for close races and local non-partisan races where people don't know the names of many candidates. Local races in particular feature low voter turnouts and low candidate expenditures that work against name recognition. By getting the names of the candidates and ballot measures you support into the public domain through a personal media campaign, you can do a lot to determine who makes up the fabric of the political culture in your community.



Becoming A Local Opinion Leader In Your Community

BY RICHARD P. BURKE

INTRODUCTION:

Many political battles are waged through TV ads, radio ads, direct mail pieces, and the like. Sometimes, though not very often, fighting battles in this way is enough. But no political campaign is complete without a ground game or some strategy to engage people directly in their communities. Phone banks, knocking on doors, and putting up signs are examples of ground game tactics. But a big part of a ground game is to secure the support of local opinion leaders in a community who are able to leverage their stature to persuade voters looking for guidance about what to do. This training is intended to help you become a strong local opinion leader.

1 WHAT IS A LOCAL OPINION LEADER

OPINION LEADERS are people whose opinions are considered by others when trying to make up their minds about something. Within the realm of public policy, newspaper columnists, religious leaders, authors, and media personalities are examples of opinion leaders. Walter Cronkite, once considered the most trusted man in America, is an example of a national opinion leader. Concerning the Vietnam War, president Johnson purportedly said, "If I lost famous Cronkite, I've lost Middle America." Opinion are sometimes as influential as political leaders themselves and can sometimes change the direction of a community, state, or even the nation.

LOCAL OPINION LEADERS do the same thing, but on a smaller scale. Local opinion leaders may include activists, respected neighbors, local office holders, members of the local clergy, business leaders, and so on. Almost ANYONE can be an opinion leader whether the influence one have extends to just a few people or thousands. Opinion Leaders have three things in common:

- a. They share **VALUES** with the people who listen to them,
- b. They are seen as **CREDIBLE** and **COMPETENT** within there area of knowledge and,
- c. They can **ARTICULATE** and **PROJECT** information, ideas, and opinions within their personal and online networks, public forums, and media outlets.

2 USE YOUR POSITION IN THE COMMUNITY TO ESTABLISH CREDIBILITY

Almost everyone has **SOME** position in the community that can be leveraged to extend your range as an opinion leader, or at least as a starting point to become an opinion leader. Though not an exhaustive list, here are some examples:

- a. **Public Officials.** By virtue of the fact that they have been elected or appointed to a public office, almost every public official starts out with two kinds of credibility even if nobody knows them:
 1. Credibility as a chosen community leader and,
 2. Credibility as a knowledgeable person within the scope of their office. Public officials can blow their credibility to be sure, but voters generally give them the benefit of the doubt.
- b. **Political Activists.** Political Activists can build (but seldom start out with) credibility as a community opinion leader. Their credibility grows with their track record. Political activists are the ones who demonstrate passion about their issues. They have taken the time to do the homework necessary to become knowledgeable. They put in the time, sacrifice their evenings and weekends to work for what they believe, and this engenders respect.
- c. **Community Volunteers.** Are you a volunteer sports coach? Are you a member of a service club like Lions, Eagles, VFW, American Legion, Kiwanis, Rotary, Optimists, Toastmasters, or a Chamber of Commerce? Do you do service work with a church or other charitable organization? If you are serving your community in ways that put you into contact with others, you already have a base of credibility and can immediately start acting as an opinion leader.

3 THINGS YOU CAN DO TO EXTEND YOUR SPHERE OF INFLUENCE

As an aspiring local opinion leader, you probably already know people who respect your opinion and sometimes seek it before casting a ballot or taking some position on public policy. You can extend your sphere of influence with just a little effort and a little thought. Here are some tips!

a. Get Out of the Echo Chamber and Identify Who You May Influence. All of us have circles of friends we share values with and who tend to agree with us. But we can all extend our spheres of influence. Think about the people you know and the circles you function with. Identify which circles of people you might have direct or indirect access to. These are people you might be able to influence and can be your next step in expanding your sphere. They might be members of your club, readers of the local newspapers, members of your church, or folks living in your neighborhood.

b. Find Ways to Project Your Message. It is important not to be too intrusive, but look for opportunities to project your opinions into their activities. If you are a member of a club, find out how to arrange for speakers to address the membership. If you are a good writer, think about writing regular Letters to the Editor, Op-Ed pieces, and participate in media blogs. Consider whether you are in a position to hold a coffee or party for neighbors where you might have a candidate or campaign representative speak. Look at your life and think about avenues at your disposal to project your message.

c. Remember – It Doesn't Have to be You! If you are a shy or reserved type, or if you have a job requiring you to keep a low profile, you can STILL be a local opinion leader. In cases like this, you can still consider the two points above. But instead of personally doing outreach or extending your name, find friends and supporters willing to do thing who you can coordinate behind the scenes!

4 SPEND THE CAPITAL: You Build By Taking Stands On Issues and Races

If you invest time in becoming a local opinion leader and developing a sphere of influence, you will eventually want to influence something! Here are some ways local opinion leaders can work within their sphere's of influence (again, the list is not exhaustive):

a. Endorse Political Campaigns. As a local public official, an experienced activist, or a community volunteer, issue a press release, go on a talk radio show, and write a Letter to the Editor endorsing the candidate or ballot measure campaign of your choice. Doing so will signal to your sphere of influence who you support and affords you the opportunity to show your reasoning. Contact the campaigns you support and offer to write them a statement of endorsement they can use publicly. Ask the campaigns you support to (NOTE: If you endorse based on your position as a public official, be sure to note that you are representing yourself, not your governing board as a whole!)

b. Arrange Lunchtime Speakers For Local Service Clubs. Civic, social, and service clubs are FULL of local opinion leaders typically across the political spectrum. And while many of them have strong opinions of their own, they can be persuadable when it comes to particular issues and candidates. Such organizations will often take the general direction represented by the speakers they host. For this reason, find out who arranges speakers for these clubs (or become this person yourself!) and work with them to book as speakers the candidates or ballot measure representatives you support along with others who support your overall orientation.

c. Project Your Message Publicly. Always telling people who you are in terms of what you do or what positions you hold, write letters to the editor, participate in blogs, issue press releases, call into talk radio shows, hold a neighborhood coffee, and engage in the other forms of activity you have decided will allow you to expand and influence those in your ever-expanding circle! If you have found people to act as your proxies, make sure they follow through!

Before taking on such activities, it is always a good idea to coordinate with the campaigns you support. They will know what messages are most effective and may be able to tell you where and how you can do the most good.

CONCLUSION:

This document is intended to introduce the concept of LOCAL OPINION LEADERS to the reader, offer some tips toward becoming a local opinion leader, and some ideas about how the reader can influence public policy and political outcomes by leveraging their positions as local opinion leaders. Such persons offer political candidate, ballot measure, and other campaigns a way to penetrate the culture of a community in order to communicate their messages, share their ideas, and persuade them to act. Make the most of the position you have in your community!



Basics Of The Board-Staff Governance Model

BY RICHARD P. BURKE

INTRODUCTION:

Public boards are made up of people who are elected or appointed to public office. Most governing bodies also have a staff, including a General Manager or Chief Executive Officer (referred to as CEO for the remainder of this document). There are generally other employees who work for the CEO. To better understand how to interact with board members and staff, this document offers information and tools for your benefit.

1 WHAT ARE THE PURPOSES OF A PUBLIC BOARD

It is the board's responsibility to govern within its mandate as provided by law and as demanded by its constituents. Specific powers of various boards vary depending on their function, but they generally are responsible for setting the direction of their government entities, setting policies, hiring a General Manager or Chief Executive Office to implement the board's will, passing ordinances, adopting budgets and sometimes levying taxes.

2 A BOARD SPEAKS ONLY WITH ONE VOICE

An INDIVIDUAL BOARD MEMBER, unless otherwise specified by law or ordinance, has NO power to do anything on their own. Individual board members do not have authority to order staff to do anything, set policy, or commit your governing entity to do anything. BOARDS have all of these powers when they act officially. The board CAN delegate its authority to a single member, in which case individual board members can act on behalf of the entire board within the scope of authority specified. Individual board members can faithfully represent official board positions in public. Board members may represent their own opinions as board members provided they make clear their positions are THEIR OWN and are NOT the positions of the board.

3 STAFF IMPLEMENTS THE WILL OF THE BOARD AND RUNS THINGS DAY-TO-DAY

Once the board has officially taken a position, commits to a direction, or takes an action, the CEO is accountable for implementing the will of the board. If the CEO fails, the board may replace him or her. While CEO's are accountable to their boards, it must always be remembered that boards are accountable to their constituents for achieving positive results. Simply blaming staff for failures won't do, at least not politically!

A CEO is bound by what the board says, not by what individual board members say. Boards should protect staff from individual members of the board by promising they will not hold the CEO responsible for keeping individual board members happy and only holding the CEO accountable to criteria established by the board.

CEOs are typically exclusively responsible for hiring, firing, promoting, or otherwise administering over other staff members. Collectively, under the administration of the CEO, staff is typically responsible for running the government entity on a day-to-day basis and is generally a repository for technical knowledge about the entity.

4 KNOW THE DIFFERENCE BETWEEN ENDS AND MEANS

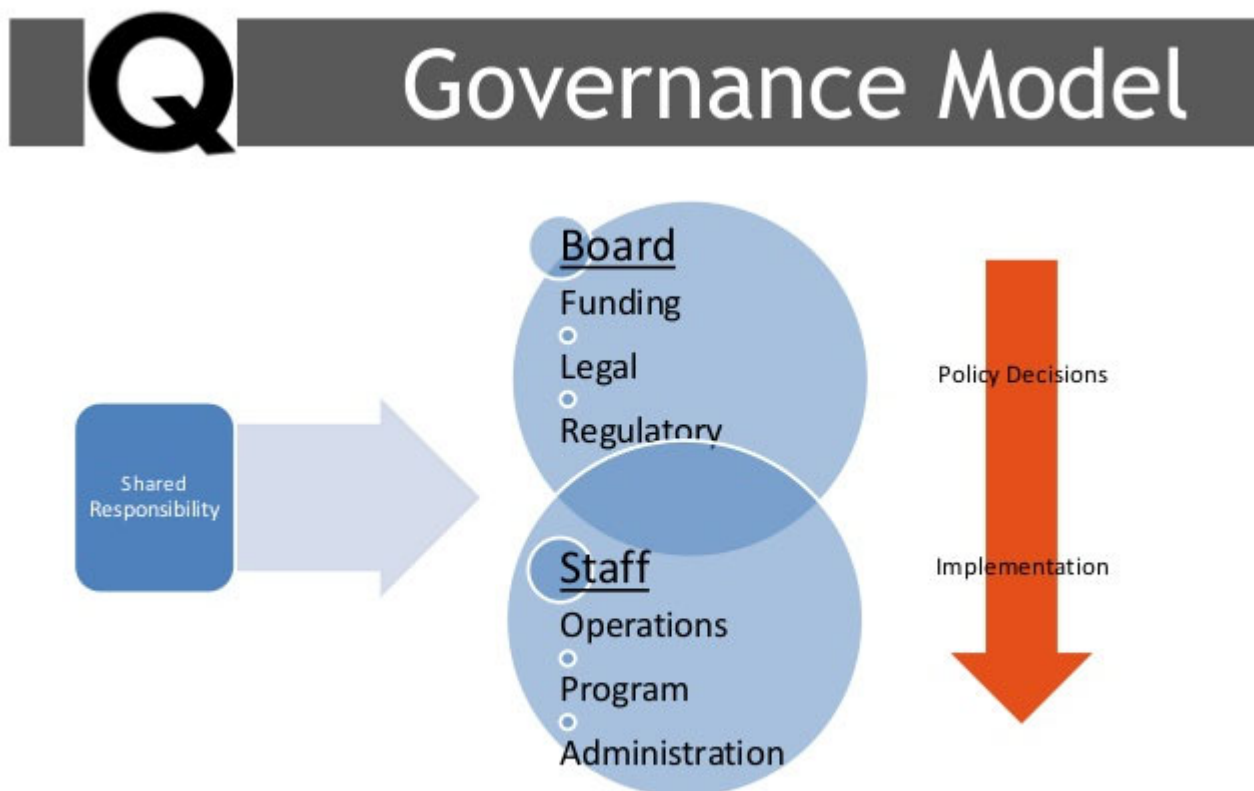
a. Ends and Means. "ENDS" are the results you want. "MEANS" are the ways and methods used to achieve the ENDS. Generally speaking, public boards are concerned with ENDS and staff members are concerned with MEANS. One exception is that boards are responsible for setting boundaries for staff by telling them which means it does NOT want them to use (for example, skirting the law, not using general obligation bonds, not using eminent domain, etc.). Within the boundaries set by the board, staff should be free to determine the MEANS by which it achieves the ENDS established by the board.

b. Micromanagement. A good governing board does not try to micromanage its staff. Staff members, and CEOs in particular, are usually professional administrators who know what they are doing. They will not function well with board members hovering over their shoulders and the best of them won't tolerate it. If you do not have faith in your CEO, you might want to find another. Otherwise, let staff do their jobs. If a board member is wandering into dealing with MEANS, he or she is probably guilty of micromanagement.

c. Very Small Boards with No Staff. Sometimes, government entities are so small that there is no staff. In these cases, board members must take on staff functions too. In these cases, it serves boards well to draw a line between determining ENDS and MEANS, making sure they wear only one of these “hats” at a time, and making sure their board members are on the same page.

CONCLUSION:

This offers a basic introduction and some rules of thumb relating to board/staff governance in Oregon. This document is not meant to constitute legal advice. Speak to an attorney if you have questions.



NOTE: This graphic is attributed to Questas Strategies and was part of a publicly available online presentation.



Assessing Yourself As A Candidate For Public Office

BY RICHARD P. BURKE

CANDIDATE SELF-ASSESSMENT GUIDE:

Our founders challenged us by envisioning a society where people take responsibility for their own governance. By stepping up and seeking elected or appointed office, you honor them (and yourself) by showing that you accept their challenge. This training is intended to help you decide the kind of position you will run for and how to go about winning your race.

Unless you are running unopposed (which you should do if you can), you will increase your chances of winning if you observe the tips outlined in this training. Honestly answer the questions asked on the back of this sheet. Your answers can be the foundation of a basic campaign plan that will help you win your election or appointment. Consider these following issues:

1 WHAT POSITION SHOULD YOU RUN FOR

Unless you are wealthy or already have high status in your community, consider running for the smallest position you believe you are in the position to win. Your passion may motivate you to run for a high position, but do not underestimate the good you can do serving in a local non-partisan office. **Too many good people run for high office their first time out without necessary resources and networks behind them.** Don't do that – if you do well in local office, it can be a springboard for you later!

2 QUALIFICATIONS

While not always true, the most important things you can bring to the table when seeking public office is your common sense, your ability to absorb and respond to good information, and to your ability to listen. Trust yourself. It isn't usually necessary for you to be an expert in the water industry, the fire and rescue industry, parks, or any other industry associated with the position you might be running for. You can learn what you need to fast enough. **People need your leadership, intelligence, and good judgment most of all!**

3 FAMILY SUPPORT

If you have a family, it is important that you have their support. While it is possible to serve in local elected office without their support, it WILL negatively affect your home life. Life balance is important. If you do not have the support of your spouse or significant other, your life may be better served if you wait for a better time.

4 FINANCIAL RESOURCES

Successful campaigns for many local non-partisan positions are not expensive, but some can be. **Either way, the candidate should be financially sound and be aware of the potential drain an active campaign can take on family resources.** An ideal candidate will have a steady income and resources to invest in his/her own campaign.

5 SKELETONS IN YOUR CLOSET

The candidate should take for granted that anything in his or her past probably will become public knowledge. That the public's "right to know" includes the candidate's personal and financial life. Have there been problems? It's okay – most everyone has skeletons these days and the Internet makes them easier to find. **Be honest about your past.** Have explanations prepared so you don't get blindsided. Most people are very forgiving.

6 YOU ARE QUALIFIED

Don't be Intimidated. There are over 7,000 local, non-partisan elected positions in Oregon. **Almost all of them are occupied by regular people like you and me who serve as volunteers.** A few have specific requirements, most only require that you be a citizen in the requisite district for the board or council you are running to serve on.

CANDIDATE SELF-ASSESSMENT FORM

1. My three best personal assets **as a candidate** are:
2. My three (3) greatest personal weakness **as a candidate** are:
3. These things in my background will be **campaign assets**:
4. These things in my background will be **campaign liabilities**:
5. **Beyond what I can personally control**, these two (2) factors will work in my favor:
6. **Beyond what I can personally control**, these two (2) factors will work against me:
7. Here are five (5) people **who will help me get elected**:
 - a.
 - b.
 - c.
 - d.
 - e.
8. Here are five (5) people **who will work to defeat me**:
 - a.
 - b.
 - c.
 - d.
 - e.
9. Here are **three (3) issues I will run on**:
 - a. Here is **one (1) basic strength** of each of the three issues listed above:
 - 1)
 - 2)
 - 3)
 - b. Here is **one (1) basic weakness** of each of the three issues listed above:
 - 1)
 - 2)
 - 3)
10. **I will NOT do the following things**, even if not doing them will cost me the election:



How To Testify To Boards and Committees

BY RICHARD P. BURKE

When you testify before a board, council or committee, (we will say board for the remainder of this document) you engage in one of the few activities with elected office holders that are both personal and public. If done correctly, public testimony can be one of the most powerful tools a grass roots volunteer can use to move public policy toward limited government.

PUBLIC TESTIMONY IS NEVER FUTILE

When you testify before a board, you are trying to convince them to do something or not do something. You may sometimes think that the board members are hopeless and will never adopt your position or idea. Occasionally this is true, but you might be surprised to know how often it isn't. **No office holder wants to be seen supporting a position that regular people can show will cause harm to their lives.**

Even if the members of the board you are testifying in front of cannot be convinced, your words may cause a reporter to interview you after your testimony. You may find that you have given voice to people in the audience who agree with you (you may then find allies who can help you). If television, radio, or even public access television cover any of your testimony, you may find yourself reaching thousands of other people. Your words might sometimes cause a board or committee to table a proposal, buying time to build support around your position.

So, in the best of circumstances, you can convince a board to adopt your position or postpone a decision which will buy you time. In the worst of circumstances, you can still find an audience and, potentially, allies that can help you in the future. Testifying also builds your stature as a public activist and will help you build credibility when you are active on other issues. **So remember: Engaging in public testimony is NEVER a waste of time.**

MAKE THE MOST OF YOUR 3 MINUTES OF FAME

When you testify before a board or committee, you will typically get three minutes at the microphone (sometimes they allow five). If you follow the following basic guidelines, you will be able to make your point effectively within that small period of time. Here goes...

REMEMBER TESTIMONY ETIQUETTE

First, remember that you are always speaking to the chair or president of the board when you testify - even if another board member asks you a question. Always address the Chair first.

Begin by thanking the board for the time. Always use their titles. For example, when you begin, say, *"Mr./Madame Chair, members of the board, thank you for this time today."* If, after your testimony, a member asks you a question, begin your answer with, *"Mr./Madame Chair, Senator Jones (the member who asks the question), my answer is..."*

Second, when you are finished, offer to answer any questions. Say thank you when you are finished. Third, and this is **VERY IMPORTANT: Always be polite and professional, even if you are angry, and even if one or more board member disrespects you. NEVER go over time.** If you need more time, create a "Tag Team" by getting one or more supporters to testify on different aspects of your issue. Always be well dressed and groomed to enhance credibility.

Finally, know that there is almost always a sign-up process. At the capitol, sign-up sheets are provided in hearing rooms shortly before a hearing begins. In local or county governments, there is usually a colored sheet you fill out with your name and address which indicates your desire to testify. Come early and sign up early. Many board chairs determine order on a first come, first serve basis, but not always. Public office holders and people with specialized information are often given preference. So, sign up early, but be patient. If you do not sign up, don't expect to speak.

1 TELL THEM WHO YOU ARE AND WHY YOU ARE THERE

Tell them WHO you are. When you begin, after you have thanked the board, tell them your name. But who you are is not just your name. Also tell them where you live and what you do for a living. Tell them who you represent if you are representing a group. If it is relevant, tell them whether you are married or have children. You can say you are a member of Americans for Prosperity if you are testifying on a prosperity related issue like taxes or property rights. If board members know that you are one of their constituents or that you are plugged into a network of lots of people, this will add weight to your testimony.

1 TELL THEM WHO YOU ARE AND WHY YOU ARE THERE (CONT)

Tell them WHY you are there. After you have told them who you are, tell them what has brought you to their meeting and what compelled you to offer testimony. For example, *"I have come to testify against House Bill 9999 which I think will make it hard for parents to put their children through college,"* or, *"I have come to support House Bill 9998 which will create thousands of family wage jobs in my community."* At this point, the board now knows your name, who you are, and why you are there.

2 TELL THEM YOUR PERSONAL STORY

Consultants and professionals are great at showing graphs, charts, and focus group results. **But you might be astonished to know that, in the world of politics, few things have the impact that a personal story does.**

This is your chance to personalize your testimony and give the board members, or whoever might be listening or watching, a reason to take your side on an issue. For example: "My father grew up in my hometown manufacturing widgets. So did his father. I am a third-generation widget maker. The widget industry is key in my town and is important to our identity, drives our town's economy, and is part of our heritage. If this ordinance passes, you will shut down our industry. I will have to pull my kids out of school and move. This ordinance will kill my community and end a way of life that has endured for one hundred years. People like me will have to take unemployment and other forms of public assistance. It is humiliating, and I know my neighbors agree."

The point here is to attach a human face and a human story to bring emotional and intellectual impact to your position. Namely, YOUR human face. You can bet that you will have an impact.

3 TELL THEM YOUR CENTRAL PRINCIPLE

As you prepare your personal story, think about the central principle involved and articulate this principle clearly when you testify. Such principles could be "freedom", "choice", "security", "prosperity"; this will vary depending on your issue. Always be clear about the principle at the heart of your story with those you are speaking to and with yourself. If you clearly name and discuss your central principle after you've given your personal story, you will put your personal story within a context that matters to everyone and adds weight to your testimony.

4 TELL THEM WHAT YOU WANT

Finally, and perhaps most important, TELL THEM WHAT YOU WANT THEM TO DO. As you conclude, always say something like, *"So for these reasons, I strongly urge you to vote FOR Ordinance 32-2 and help preserve jobs in my community,"* or *"So for these reasons, I strongly urge you to vote AGAINST Senate Bill 8888 and protect charter schools throughout Oregon".* Bottom line, tell them what you want them to do.

You are a salesperson when you testify. Your product is your position on an issue, and you are trying to convince the board to adopt your position instead of someone else's. So, remember, always ask for the sale.

EXERCISE

As an exercise, pair up in threes. Each person will take five minutes and think of an issue that is important to them. Imagine a bill is under consideration supporting your side of an issue. On a piece of paper, write down a name for this bill, what the bill does, and construct your testimony based on the material in this lesson.

The three of you will take turns in the following roles:

1) One will be a board chair, 2) One will be another member of the board and 3) One will be a citizen testifying to the board about the bill idea they came up with. The "citizen" who is testifying will offer his or her testimony. The "board members" will listen. The "board member" who is not the chair will keep time, and the "citizen" will be limited to three minutes. The citizen will use testimony etiquette as he or she testifies and the "board members" will respectfully assist if there are any mistakes (real board members usually, but not always, offer assistance too).

After the testimony, one of the "board members" will ask a question (any question - we are practicing etiquette here). After the question is answered, switch roles until each person has had a chance to play every role. When you are done, go out and be heard! Thanks, and good luck!

TIPS FOR TRAINERS:

You might find that students appear “lost” over how to testify, even after you present the information in this unit. Remember - according to some psychological studies public speaking is feared more than death by most people. Even within the trios formed in the exercise, some of your students may find themselves feeling intimidated. It is important that you be VERY encouraging and do all you can to help your students succeed in the exercise. IMPORTANT: If the number of students leaves one person out after forming groups of three, break one trio up to form two pairs. It is better if you do not personally participate in the exercise as you will need to float around the room helping and encouraging your students.

1 GO THROUGH THE MATERIAL INTERACTIVELY

When you are presenting materials with lots of information, encourage students to interrupt with questions and comments by raising their hands during your presentation. By interacting with people throughout the lesson, students will remain interested longer. They will assimilate information better because they will be able to put it into a context they relate to. You will learn things too, and your voice will get an occasional break (have a glass of water handy)! If you ask them to hold their questions until you are finished, they will be more likely to daydream and will often forget the questions they wanted to ask.

2 HELP YOUR STUDENT PREPARE FOR THE EXERCISE

At the beginning of the lesson, pass out 4”x6” index cards to each student. Ask them to think about a fictional bill relating to an issue (*any issue*) that is important to them. Ask them to give a name to their fictional bill, like the “Taxpayer Freedom Act”, and write it at the top of the card. Just below, ask them to write in one sentence what the bill would do (*keep it simple*). THIS will be the “bill” they will testify on during the exercise. As you go through the lesson and review each of the four elements of good testimony (*who you are, personal story, central principle, and what you want*), ask your students to use the back of their cards to note how they would present these elements if they were testifying on the bill. By the time you have gone through the material, each student should have written a basic outline of their testimony and will be ready to perform the exercise.

3 DEMONSTRATE THE EXERCISE

Before you ask your students to perform the exercise, it is a good idea to offer a demonstration of it. Before your meeting, ask two reliable AFP members to join you in a demonstration. Ideally, at least one of them should have served on a public board or committee and have some experience in offering testimony. The demonstration should feature the four elements of good grass roots testimony discussed in the lesson, and you should point them out as you go through your testimony. Rehearse your demonstration before the meeting - remember, your demonstration will provide the example your students will follow.

4 DON'T BE TOO CRITICAL WHEN STUDENTS MAKE MISTAKES

Speaking in public is one of the most difficult things for most people to do. If you criticize them (“Don’t do it THAT way” or “They’ll eat you alive if you say that”), they will feel intimidated and be less likely to testify before a real board or committee in the future. Instead, use positive language (“That was fine, but think about trying it like THIS”, and “I see what you are getting at, but you might try saying it like this...”). The idea is to offer encouragement to participants and make it easy for them to succeed. Let them know in advance that mistakes are OK. This will build their confidence and they will be more likely to testify in the future. If they freeze up and fail the exercise, tell them that it is okay and that they can try again some other time. Perhaps one of the two volunteers who participated in your demonstration will offer to tutor them personally outside of the AFP meeting.

5 TELL THEM ABOUT “OPEN COMMUNICATION”

Most boards and committees have a section called “Open Communication” where people can testify on any topic not on the meeting’s agenda. This is a great place for people to start as they can offer their first testimony on an issue they are comfortable with and be less likely to run into hostile questioning from the board. Remember, we want each student’s first experience in offering testimony to be a good one!

6 HAVE A LIST OF UPCOMING LOCAL BOARD MEETINGS HANDY

Ask a volunteer or your one of your assistant chairs to research all of the governing bodies in your area and make a list of opportunities to offer testimony - Delegate this, don't do it yourself. Your county election office will be able to provide you with a list of boards and committees in your area ranging from county commissions to irrigation and vector control districts. You can find out which boards take testimony by checking their agendas. Many of these bodies will have their agendas online, but your county election office can tell you where to get them. Agendas should include the amount of time citizens are given to testify. You may want to contact your local cable public access television service to see which public meetings are covered over the local cable network 7.

7 GET COMMITMENTS TO OFFER TESTIMONY

Using the list discussed in the above paragraph, invite pairs of students to commit to offering testimony at one of the board or committee meetings listed. One way to do this is to ask them to provide their initials on the list next to the board or committee meeting they want to testify at. It is good for them to do this in pairs as they can support each other and have the opportunity to practice with each other in advance. If you think it is appropriate, you can contact the chairperson of boards and committees people sign up for and tell them that people will be coming to testify for the first time. This can help to make the first testimonial experience of your students a positive one. Good luck!



Basics of Oregon Ethics Laws

BY RICHARD P. BURKE

INTRODUCTION:

If you are a public official, may one day be a public official, or are an activist who monitors government boards and commissions, you will want to become familiar with Oregon government ethics law. NOTE: This training document is not a legal document, nor is it intended to provide legal advice. Instead, it is a descriptive, but not exhaustive, document about some basics of Oregon government ethics laws. For more information, read the statutes described in this document or check out the Oregon Govt. Ethics Commission (OGE) website by pointing your browser to: <http://www.oregon.gov/ogec/Pages/index.aspx>

1 WHO DO ETHICS LAWS APPLY TO

Oregon ethics laws apply to public officials (ORS Chapter 244), lobbyists (ORS 171.725 through 171.992), and the executive session provisions of Oregon Public Meetings law (ORS 192.660). You should consider reading these statutes to learn more. The scope of this document will be limited to dealing with ethics laws as they relate to public officials.

2 WHO IS A PUBLIC OFFICIAL

A public official is any person serving the State of Oregon, any of its political subdivisions, or any public body whether they are an elected official, appointed official, employee or agent. It doesn't matter if they are compensated for their services or not. If people perform such tasks as picking up litter on public lands, taking part in a building cleanup, or other such activities, they are not considered to be public officials.

3 WHAT ARE THE PURPOSES OF ETHICS LAWS

Overall, the main purposes of ethics laws are to prevent and stop government corruption intended to:

- a. Prevent public officials from using their positions to obtain financial benefits that would not be available to them, their household members, or any businesses that they, their relatives, or their household members are associated with if they were not public officials.
- b. Prevent public officials from using confidential information obtained because of their positions or actions taken in the course of carrying out their duties for personal gain.
- c. Prevent public officials from testifying to their own boards or commissions when they own or represent businesses which their boards pay or may pay for specific goods or services. Examples include engineering firms, legal firms, architectural firms, and software companies. Other people may represent such firms, but not the office holders themselves.
- d. Determine which forms of compensation or benefits public officials may properly receive for their work. These include official compensation (established salary, health care benefits, and the like), reimbursement of expenses (reasonable expenses incurred while working in an official capacity), honorarium not exceeding \$50 (a speech, for example, although additional requirements for honorarium exist in statute), awards for professional achievement (there are restrictions to delineate such awards from honorarium or gifts), contributions to legal defense funds, and certain gifts. Statute establishes many conditions with respect to these categories.

4 OTHER ISSUES

a. Nepotism. For the purposes of this training, nepotism is defined as hiring, appointing, or awarding contracts to persons based solely on their familial relationship to a public official. Family members of public officials can be hired, appointed, and awarded contracts, but there are a number of restrictions and caveats outlined in statute.

Officially, "family members" include the current spouse of the public official plus their children, parents, step-parents, stepchildren, siblings, half-siblings, parent and siblings in-law, aunts, uncles, nieces and nephews.

A public official must declare any actual or potential conflict of interest before taking action. No public official can participate in any personnel action that would impact family or household members unless they are serving

4 OTHER ISSUES (CONT)

as volunteers. Unless they are a member of the legislature, no public official can be in a position where they are supervising a family or household member unless they are serving as a volunteer (a public board may determine when such supervision can take place). There are exceptions in statute relating to unusual cases.

b. Owning a Business or Accepting Private Employment. Generally, public officials can work for private employers or even own their own business. It is illegal to solicit or extend a promise of employment based on a person's status as a public official. Public officials cannot use public resources or their position to create opportunities for income. There must be a clear distinction between a public official's private work and their use of the public body's time and resources.

c. Employment of Former Public Officials. For two years after a person ceases being a public official, they may not have a direct financial interest in a public contract where one of the parties is the public body they had served on. They must not have "paved the way" for such contracts while previously serving on the board by playing a significant role in selecting, recommending, or approving the vendor they have an interest with.

There are few restrictions on what employment public officials may accept after they leave their positions, but they cannot use confidential information obtained while serving as an official for personal gain. There are additional restrictions in ORS Chapter 244 relating to people wishing to work with or for particular government entities.

d. Accepting Gifts. A "gift" is something of economic value offered to an official or candidate, or members of their household, without cost which is not made available to the general public. There are circumstances where accepting gifts can be appropriate, but it is generally best for public officials to avoid accepting gifts – doing so makes it easy to accidentally step on a legal landmine and can create perceptions of corruption even if one is technically behaving legally. If you see a public official accepting a lot of gifts, you could be looking at red flags.

In the Oregon Government Ethics Commission's "Guide for Public Officials," pages and pages are dedicated to determining what a "gift" is, what kinds of gifts may be accepted under what circumstances, and more – that's how complicated it is. As an example, vendors will sometimes entertain board members, but their gifts (generally dinners), typically can not come to more than \$50 per year per official.

5 CONFLICTS OF INTEREST

Oregon ethics laws make a distinction between ACTUAL conflicts of interest, where a public official "would" have a conflict, and POTENTIAL conflicts of interest, where the public official "could" have a conflict. An example of an ACTUAL conflict of interest would be if a board member who was also a city employee was asked to vote on a contract between his board and the city he works for. A POTENTIAL conflict of interest might be if a board member owned a construction company that could be engaged by the board he serves on to build something.

Public officials must announce any conflicts before participating in any official action on each item in which they may have conflicts. They must announce whether they have an actual or potential conflict of interest. If they have a POTENTIAL conflict of interest, they may participate in taking official action on the item after announcing the potential conflict. If they have an ACTUAL conflict, they may not participate unless their vote is required to meet the minimum number of votes required to act (like when so many members of the board have conflicts that the board could not otherwise take action). Declared conflicts of interest are recorded in meeting minutes. More specific details exist in statute.

CONCLUSION:

This offers a basic introduction and some rules of thumb relating to Oregon's ethics laws. Speak to an attorney or contact the Oregon Ethics commission if you have questions. Learn more by visiting the website of the Oregon Ethics Commission and reading their document, "A Guide for Public Officials," available on the Oregon Ethics Commission website and made available as a part of this training. Using common sense and acting with integrity covers most of the bases, but there are traps! Know the guidelines and you'll be OK!



Basics of Washington Ethics Laws

BY RICHARD P. BURKE

INTRODUCTION:

If you are a public official, may one day be a public official, or are an activist who monitors government boards and commissions, you will want to become familiar with Washington ethics laws. NOTE: This training document is not a legal document, nor is it intended to provide legal advice. Instead, it is a descriptive, but not exhaustive, document about some basics of Washington ethics laws. For more information, read the statutes described in this document or check out the Washington Ethics Commission website by pointing your browser to: <http://www.Washington.gov/ogec/Pages/index.aspx>

1 WHO DO ETHICS LAWS APPLY TO

Washington ethics laws apply to public officials, public employees, and public records. Laws and regulations covering this can be found in Ch. 42.52 RCW, Ch. 292.100 WAC, Ch. 292.110 WAC, Ch. 292.120 WAC, and Ch. 292.130 WAC. You should consider reading these statutes to learn more. The scope of this document will be limited to ethics laws as they relate to public officials.

2 WHO IS A PUBLIC OFFICIAL

A public official is any person holding a public office in Washington, including any federal, state, judicial, county, city, town, school district, port district, special district, or other state political subdivisions office. In short, if you got elected to a public office in Washington, ethics laws apply to you. If you are selected to fill an appointed position, you should consider yourself a public official too.

3 WHAT ARE THE PURPOSES OF ETHICS LAWS

Overall, the main purposes of ethics laws are to prevent and stop government corruption. Ethics laws are intended to set the standards by which governments conduct themselves. They are intended to:

- a. Prevent public officials from using their positions to obtain financial benefits that would not be available to them, their household members, or any businesses that they, their relatives, or their household members are associated with if they were not public officials.
- b. Prevent public officials from using confidential information obtained because of their positions or actions taken in the course of carrying out their duties for personal gain.
- c. Determine which forms of compensation or benefits public officials may properly receive for their work. These include official compensation (established salary, health care benefits, and the like), reimbursement of reasonable expenses incurred while working in an official capacity including travel expenses, properly reported campaign contributions, awards for professional achievement (there are restrictions to delineate such awards from honorarium or gifts), limited "de minimis" personal use of public facilities. Statute establishes many conditions with respect to these categories. While this covers many of the most common examples, it is not an exhaustive list.

4 OTHER ISSUES

- a. **Nepotism.** Nepotism is covered in Ch. 495d-113 WAC. It is defined as "the practice of showing favoritism to relatives in hiring and employment practices." It is good practice to apply this to the awarding of contracts. Nepotism is only loosely regulated at the state level and municipalities often have their own politics on nepotism – check with your local or county clerk.

In general, family members of public officials can be hired to work for the same public entity provided the official is not involved in the recruitment, screening, appointment, termination, promotion, demotion, changes in compensation, supervision, or evaluation of a person with whom the official shares a substantial economic interest. Otherwise, such relationships shall not be used as a basis for granting or denying employment rights, privileges, or benefits.

4 OTHER ISSUES (CONT)

In statute, “family member or relative” includes the spouse or domestic partner, children (including adopted and foster children), siblings, grandparents, uncles and aunts, nephews and nieces, in-laws, and the employees’ spouse or domestic partner. But with respect to an “intermediaries,” those who transmit campaign contributions to a candidates or campaign committees, the definition is broadened to include stepchildren, grandchildren, parents, step-parents, grandparents, siblings, half-siblings of the individual and the spouse or the domestic partner of any such person.

b. Owning a Business or Accepting Private Employment. Generally, public officials can work for private employers or even own their own business. It is illegal to solicit or extend a promise of employment based on a person’s status as a public official. Public officials cannot use public resources or their position to create opportunities for income. There must be a clear distinction between a public official’s private work and their use of the public body’s time and resources.

c. Employment of Former Public Officials. Generally, a former public official cannot accept employment from an employer for up to two years if the former official, during the last year of his/her service was involved with the negotiation or administration of a contract between the prospective employer and the public body he or she served on. There are more details in statute.

For two years after he/she leaves office, the former official may not have a direct or indirect beneficial interest in any contract or grant resulting from interactions between the public board he/she served on and any other entity if the former public official participated in activities leading to the awarding of the contract or grant.

No former public official may accept employment or compensation from a prospective employer if a reasonable person could believe that such an offer was extended in compensation for the former public official taking a particular action or actions before leaving office. Former public officials cannot use confidential information obtained while serving for personal gain.

d. Accepting Gifts. A “gift” is something of economic value offered to an official or candidate, or members of their household, without cost which is not made available to the general public. There are circumstances where accepting gifts can be appropriate, but it is generally best for public officials to avoid accepting gifts – doing so makes it easy to accidentally step on a legal landmine and can create perceptions of corruption even if one is technically behaving legally. If you see a public official accepting a lot of gifts, you could be looking at red flags.

Chapter 42.52.140 RCW defines what constitutes a gift and under what circumstances. Gifts of an aggregate value exceeding \$50 cannot be accepted from a single source. Gifts given to an official’s family or guests will be counted toward the \$50 limit.

5 CONFLICTS OF INTEREST

Conflicts of interest arise when a public officials finds themselves in positions where acting in an official capacity can create benefits that other people would not have access to. When public officials recognize such conflicts, they need to declare them conflict publicly and remove themselves from the decision making process related to the matter at hand. Washington statute discusses different kinds of conflicts:

a. Activities Incompatible with Public Duties. No state officer or state employee may have an interest, financial or otherwise, direct or indirect, or engage in a business, transaction, or personal activity, or incur an obligation of any nature, that is in conflict with the proper discharge of the state officer’s or state employee’s official duties.

b. Activities Creating Personal Financial Conflicts of Interest. No state officer may be beneficially interested, directly or indirectly in a contract, sale, leaser, purchase, or grant that may be made by, through, or is under the supervision of the officer or employee, in whole or in part. Neither may he or she accept, directly or indirectly, any compensation, gratuity, or reward from any other person beneficially interested in the contract, sale, lease, purchase, or grant.

CONCLUSION:

This offers a basic introduction and rules of thumb relating to Washington’s ethics laws. You can learn more by reading statutes on ethics, visiting the websites of the Washington State Executive Ethics Board, The Washington State Legislative Ethics Board, and the Seattle Ethics and Elections Commission. Using common sense and acting with integrity covers most of the bases, but there are traps! Know the guidelines and you’ll be OK!



Running Efficient and Effective Meetings

BY RICHARD P. BURKE

INTRODUCTION:

One of the ways you can keep people motivated during meetings and attract new people to future meetings is to run your meetings efficiently and effectively. We have all been to meetings that have no structure, no direction, and seem to go on forever without accomplishing anything. **DON'T LET THIS HAPPEN TO YOUR ORGANIZATION!** Well run meetings are the sign of a healthy chapter, and they can often be the thing that helps a struggling chapter become healthy.

1 ADOPT AN AGENDA

By using agendas, and printing them off for distribution at meetings, you will lend structure and direction to your meetings while letting attendees know what to expect. Many organizations already do this, and they have found that drafting, printing, and distributing agendas helps to keep meetings on track and on time. Here is a simple agenda you can use to start out with:

1. **Call To Order / Pledge of Allegiance / Invocation**
2. **Introductions of Leaders and Guests**
3. **Reports**
4. **Old Business**
5. **New Business**
6. **Main Program - Training or Project**
7. **Adjournment**

This agenda may or may not be suitable for your chapter, but the idea is that you have some kind of planned structure for the meeting. By printing and distributing the agenda, you can help to keep your meetings on track (attendees will help you too if the meeting gets stalled for some reason).

2 ADD TIME LIMITS TO YOUR AGENDAS

You can take agendas one step further. Even with agendas, meetings can run long - especially if you have one or more speakers that drone on and on and on; do you know any such people? If you do, you can regain control of your agenda without any awkward interruptions by adding time limits to your agenda - and making it clear at the meeting's start that you will enforce them:

1. **6:30: Call To Order / Pledge of Allegiance / Invocation** (2 minutes)
2. **6:32: Introductions of Leaders and Guests** (3 minutes)
3. **6:35: Reports** (5 minutes)
4. **6:40: Old Business** (20 minutes)
5. **7:00: New Business** (30 minutes)
6. **7:30: Main Program - Training or Project** (30 minutes)
7. **8:00: Adjournment**

You would not believe how well having a schedule like this helps to pace a meeting. Trust me, it works. Having a digital clock with big red numbers also helps. In this case, speakers who tend to drone on will effectively police themselves because they will know how much time they have and will know exactly what time it is. If they are interrupted because of time, they will be less likely to be offended.

By having well-structured meetings that stick to an agenda and making sure that your agenda helps pace your meetings, you will find your meetings run more efficiently and will be more fun for your attendees. Good luck!



The Challenges of Serving As An Organization's Chair

BY RICHARD P. BURKE

Congratulations on Accepting This Challenge!

Sometimes, the job of Chair can be challenging. The Chair needs organizational and administrative skills, diplomacy, sales ability, people skills - while understanding what the principles of limited government and free enterprise are all about. The Chair needs patience, self-control, and an ego capable of dealing with criticism and (occasional abuse) without resentment.

Beyond this, the Chair needs to have good judgment and be an effective listener. It takes creativity to deal with limited resources and a shortage of effective volunteers. The Chair should get as much help as possible from other leaders, your rank-and-file membership, and grass roots volunteers. This combination of traits is rare, **but they can be developed. If you choose to develop these skills, you will be a great asset to the limited government movement.**

One can get frustrated. Inevitably, the Chair discovers the job has far more responsibility than authority. The Chair's real "power" comes from the personal respect he/she receives from the local members he/she works with. This respect must be earned. *But when it works, it is incredibly rewarding.*

Though most of your members support the principles of free enterprise and limited government, individual members come to organizations with different priorities and agendas. Sometimes this can result in conflict. One key role of the Chair is to resolve conflict and find ways to get people to work together effectively. In some cases, this means mediating disputes. In other cases, it means finding ways to work to find reasonable solutions that satisfy everyone. *In all cases, it means making sure people focus on the issues and not on personality clashes when they arise.*

TAKE YOUR TIME AND INVOLVE LOTS OF PEOPLE

Proposals should be well thought out prior to presentation and implementation. This means talking ideas over with as many people as possible and listening to what they have to say. It means being flexible enough to change the plan when good suggestions are made.

The Chair should encourage participation and seek the input of others before decisions are made regarding local volunteer work (people work harder for proposals they helped to develop). The Chair needs to understand the "business" of running the organization. This includes organizing events, working with your assistants, dealing

with volunteers, occasionally serving as a local contact for the media, and running meetings. These "details" can undermine the success of an organization if they are not handled correctly. If all of this sounds intimidating, don't worry. You are not alone.

TIPS ON BEING A GOOD ORGANIZATION CHAIR

- Like most people, grass roots volunteers want to be treated with **respect**.
- Rank and file members usually want to know **why** something must be done.
- Members resist "taking orders" and respond better to being **asked** to do something.
- Members are very independent and may require being **sold** on the worth of the activity.
- Members need to feel that their efforts are **appreciated**, and their ideas **valued**.
- Members respond better to **praise** and **recognition** than to criticism and "guilt trips."
- Since there is no patronage and little money, **success will come only from the energy and creativity of your grass roots volunteers.** The Chair's role is to find ways to make it easier for people to be effective. Find ways to make activism fun and rewarding.

The job of Chair is not for "prima donnas." *The effective Chair does not seek recognition, but instead seeks to recognize the accomplishments of others.* The Chair will accept blame for failures, even those of others - Loyalty starts from the top. But the good news is that the loyalty and respect you engender will help you make it through difficult times.

No one is perfect, so it makes sense to work with many different kinds of people. The Chair needs to know his/her strengths and weaknesses, and recruit people with complementary skills as needed.

Finally, the Chair needs a sense of humor. Without it, the job can drive him/her crazy when a lot is going on. Few people are *ideally* suited to being Chair, but most people can be effective if they understand what needs to be done and what being Chair means.



Taking Your Power Back: Making Interpersonal Relationships Work For Your Political Organization

BY TERESA de BELLIS

HOW TO: WORK TOGETHER POLITICALLY

Working together in a group can be a rewarding experience, or it can be quite a negative one. When working with a number of people, there are some **key principles** to understand that will help you navigate the disparate thoughts, feelings, attitudes, and opinions of the people that make up your group and move everyone toward your common political goal.

- Ideas are the most important bonding/binding element in your organization. The ideas that offer the most freedom are the largest, most evolved ideas, and you need to reach to find them, and discover their truths. There are always more of them. They have the power to unite your group.
- The more responsibility you take, the more freedom you have. This principle is so vast, it applies to all areas of human endeavor and offers growth and resolution.
- No one, no matter who they are, or how powerful they are, can take your power away from you. You must give it to them.
- You create your own reality, either by consciously creating it, or by allowing it, via your thoughts, feelings, attitudes, beliefs, choices, and decisions. You create all of it, with no exception. The tools you use are your desire, your imagination, and your expectation. (See attached material where current understanding of the laws of physics and the information from Concept: Synergy's "Manifesting What You Want" explains this principle.)

HOW TO: UNITE YOUR GROUP AND INSPIRE YOUR MEMBERS TO ACTION

1 IDENTIFY YOUR GROUP'S GOAL, WHETHER IT BE ACTIVE, OR INTELLECTUAL, AND AGREE TO WORK TOGETHER TO ACHIEVE THAT GOAL

Every time your group gets together to meet, all members should have a clear understanding of the purpose of the meeting and what goals you expect to have accomplished by the end of the meeting. You can write up a meeting agenda beforehand and make sure that all members have a copy, so that everyone's expectations of what will happen will be clear. Speakers' discussions should be related to the agreed-upon goals of your meeting. This established framework for discussion will help everyone stay on topic and on goal.

2 SET CLEAR BOUNDARIES FOR RESPECTFUL CONDUCT AND COMMUNICATION

- a. Setting clear boundaries for respectful conduct before communication begins will help you run your meeting and keep the line of discourse on track for the accomplishment of your goals. A widely used tool for setting respectful boundaries is the most commonly adopted parliamentary authority among informal organizations in the United States, Robert's Rules of Order, by Henry Martyn Robert. Originally published in 1876, the purpose of this book, according to Wikipedia's definition, "[...]is to] act as a guide for conducting meetings and making decisions as a group. [...] enable[s] assemblies of any size, with due regard for every member's opinion, to arrive at the general will on the maximum number of questions of varying complexity in a minimum amount of time and under all kinds of internal climate ranging from total harmony to hardened or impassioned division of opinion."
- b. If this tool does not seem appropriate to use to achieve your group's purpose, it is important that you do set some boundaries that will help you run a respectful, positive meeting, in which those voices who want to be heard and a common consensus reached. Limits placed on time for discussion are boundaries that can help you maintain order in a meeting when one person is using the microphone. Let the person who has the microphone know before they begin speaking that there will be a time limit for their use of it. You can also help them to keep track of time and agree upon a signal so that you will be able to unobtrusively indicate to them when their time for speaking is up.

3 LISTENING SKILLS, THINKING SKILLS, AND HOW TO APPLY THEM TO SERVE THE GOALS OF YOUR POLITICAL GROUP

Communication is an often misunderstood skill. It is a skill, and it is an ideal, and therefore good communication is something which you always work to improve within yourself. Listening well is equally important as being heard.

a. Be truthful, but tactful. Speaking your truth in the moment takes practice. When discussing a different point of view with someone, or a point of contention, it is helpful to use “I” statements, rather than “you” statements, as you are only responsible for your own point of view, and, nobody likes to be assessed by another when it comes to viewpoints. You will come to find that the people who do not want to hear your truth will eventually not come around (unless conflict is really the goal).

b. Remember that your truth is just that, it's yours. This is tricky. Your beliefs are the most powerful reality generating tool you have, and so ultimately, if you believe it to be true, you will find evidence of its truth, but your belief came first before there was evidence of it.

c. Listening requires thinking. As a society, we generally stopped thinking in the early to mid-seventies. We very much need this skill back in order to take responsibility for our republic. Thomas Jefferson said, “The price of a democracy is eternal vigilance” (though it was actually attributed earlier to John Philpot Curran around 1817). Keep in mind when you are listening to someone that it is an active process, that you are always listening to learn something new (none of us will ever know everything), and that you are actively engaged in searching for the most expansive ideas and truth that you can. Good thinking and listening skills will help you to add to and participate in thoughtful conversation, which serves to stimulate more thought, and more creativity.

4 HOW TO MITIGATES THE SITUATION WHEN A MEMBER IS ATTEMPTING TO DOMINATE THE DIALOGUE, OR TAKEOVER THE MEETING

Since you create your own reality, there is no place for blame in an assessment or understanding of what's happening, there is only an opportunity for you to take responsibility and change what you feel needs to change. This is actually very good news, but it may be taken to be bad news for those who would rather have other people make decisions and take their ability to respond (responsibility) away from them. In a political group, the more you understand that this is the truth, the more you will be able to identify those attitudes and beliefs in others that will not move your group forward toward your political goal. You can help your members remember that your organization will be successful when you work together without the need to dominate or be dominated by anyone. The model of equality without hierarchy works best. Once you recognize these truths, you will be able to respond quickly when you see that someone is attempting to dominate your agenda or takeover the meeting, and you can then lead the conversation around to a more constructive approach.

5 IDENTIFY WHAT EACH MEMBER BRINGS TO THE TABLE

Each member needs to bring their talents, skills, and their character to the group effort. Identifying what each member brings to the table will encourage confidence in all members. The group will rely on that member for their character, and together, all of the parts are greater than the sum the of the group's effort. Character, usually thought of as the frequency by which you live your principles, is a relatively unexplored phenomenon, and is sadly lacking in many of our political leaders today. As an ideal, again it is a part of yourself that you always work to improve. Those qualities that humans need in order to grow are honor, loyalty, nobility, virtue, grace (gracious generosity), truth, courage, courtesy, gallantry (heroic courtesy), authority, service, and humility. (To find more about this information, see the Merlin-Arthur material by Lazaris/Concept: Synergy). Have each member in your group identify which among these qualities they have within them that is a strong part of who they are. It is the strength that they bring to the group for which they can be relied on to lead that will inspire others. These strengths may change within a person through time, but they need to become a focus in your organization and will inspire others in the community to reach for these important ideals within themselves as well.

6 A FEW THINGS ABOUT POLITICS IN GENERAL

More of us than we'd like to admit have had our political affiliation handed to us by our parents. Less people have given a lot of thought to what other parties have to say, and why they feel the way that they do. It is never helpful to limit your awareness and let your party dictate what you think. All political parties have some piece of reality that they have identified as important for health of our nation, and as such, it is worthy of your thoughtful attention. What you will find when you explore the other parties are some of the good people that make up this diverse country. They are not bad, or evil. When you let yourself fall into believing that rhetoric that the media knows keeps its viewers interested and boosts it ratings, you are at risk of continuing the divisive grip that has us fighting wars we need not fight for other

6 A FEW THINGS ABOUT POLITICS IN GENERAL (CONT)

people's agendas and brings our country to the brink of ruinous debt. Take a deep breath and try to understand what the other side cares about, from their point of view. It will help you to imagine solutions to problems that seem to have no solution, and to find a practical solution together, without compromise, that works.

7 THESE PRINCIPLES IN ACTION

The political organization of which I am part has few members, but each member offers their skills, talents, and character to the group effort, without being asked or reminded to do so. Our members include a 17-year-old entrepreneur yak-farmer, a 77 year-old community activist with a long history of political involvement, a few ex-military, one female, and other successful business people. When we meet, we rarely get sidetracked by complaining about the political landscape, but rather we come interested to see each other again, and eager to contribute to the group effort. Last I heard, one member, by himself, put out 2,000 door-knockers, and hundreds of signs, without being asked to do so. Another member always brings his happiness and his humor to our meetings. Our leader leads without dominating (with humility), which in turn inspires action from the rest of us. All members take responsibility for our group's progress and outcome. Difficult communication is communicated directly, but tactfully, and our members hear that communication without becoming defensive. We are action oriented, set out to achieve tangible political goals, and have been successful to some extent, where we have put our focus.



Setting Up A Voter Registration Booth

BY RICHARD P. BURKE

WHY RUN A VOTER REGISTRATION BOOTH?

Running a voter registration tables or booths can help your organization in some very important ways: *1) You can register voters who will generally support your goals at the ballot box, 2) You will meet new people with energy and talent who can make your organization more effective, 3) You will raise your profile in the community and build a level of prestige for your organization and, 4) You will have a chance to help your volunteers interact with the public, building their sense of confidence and camaraderie.* This paper will help your organization realize all of these benefits by running an effective voter registration booth.

1 SECURE A LOCATION FOR YOUR BOOTH

Where do you set up a voter registration booth? The answer varies widely depending on the community you live in. Generally, county fairs, gun shows, farmers markets, local festivals, open houses, art fairs, and many other sorts of venues are good bets. The organizers of many events let non-profit organizations set up an exhibition booth or table free or for a nominal charge. Some retail stores like Wal-Mart and Safeway will let you set up a voter registration booth, but you **MUST** stress to them that you are a non-partisan, non-profit organization that does not endorse political parties or candidates (most retailers don't like to be seen taking sides in political races).

After you identify venues, you think would work, find out who is in charge. Managers will usually have authority to grant you permission to host a booth at retail stores. For other venues, try the Internet or phone numbers published in newspaper ads. If they are willing to let you set up a booth, they will usually ask you to fill out a simple application, so they have a contact person. Sometimes, they will offer a sheet with rules and restrictions (always obey them). Never argue with such a person, even if he or she says "no," seems impolite or is otherwise hostile. Always be polite. If they say "no," graciously thank them for your time.

2 SET GOALS AND SECURE SUPPLIES

While registering voters is the outward reason to run a voter registration booth, it is really only the frosting on the cake. The most benefit from running a booth is realized in building your network of sympathetic households who support your group.

Remember you are scouting for members, talent, and connections. Set realistic goals for how many people you will speak to, how many members you will sign up, how many pieces of literature you will hand out and, yes, how many voters will you register. Once you set these goals, focus on them and plan everything else in a way that will work to support reaching.

3 SECURE YOUR SUPPLIES

You can get voter registration cards free of charge from your county elections office. While they may limit the number of cards they will give you, the typical booth will only need 100 or so. Involve and work with other members, organizations and contacts to make sure you have all of the voter registration forms, literature, and other materials that you need to make your booth successful. Do this well in advance - don't wait for the last minute.

Think about decorations, banners, or whatever you can come up with. These are very inexpensive and decorating a booth can be an excellent project for an artistically minded volunteer with a little time. Make sure you have plenty of pens, a few clipboards, and some snacks and drinks for booth workers. Find out if a table and chairs are provided. If not, you will need to secure these items as well.

4 PULL OUT

Virtually **EVERYONE** who allows you to set up a booth at their event will insist that your booth be manned at all times. Prior to the booth event, set up a time chart and recruit volunteers to staff the booth in two-, three-, or four-hour shifts. Always try to staff at least two people in the booth and work hard to have your staffing organized for the entire event before the event starts.

Sometimes life interferes, and people don't show up - *count on this happening*. Compensate by asking one or two reliable volunteers to be "on call" if someone doesn't show up.

You may wish to assign the task of staffing the booth to a reliable volunteer so you can focus on other things that will make your booth successful. This person should be willing to remind people of their commitments via phone calls as well as emails - reminding them to be dressed and groomed in a way that lends credibility your local organization. Because people often run a little late, ask them to arrive to five or ten minutes early.

If you know a sympathetic state senator or other well-known public official, ask them to work a shift in your

booth with you. Doing so will establish your chapter in the mind of the official (improving your lobbying clout in the future) and offer the official a chance to appear “the good public servant” mingling with his or her constituents. Having a well know official also creates a “draw” for your booth that will bring in a lot of people and establish your credibility in the minds of those visiting or passing by your booth.

5 TELL PEOPLE ABOUT YOUR BOOTH

Contact your local newspapers, radio stations, and television stations. Tell them about your booth, when and where it will take place. If a well-known public figure will be present, include this information as well - this could improve your chances for media coverage.

Use email discussion lists, Internet services like Meet Up, and phone lists to tell people about your booth. You may have contacts in like-minded organizations who would be willing to spread the word using their resources as well. Leave no stone unturned!

6 ARRIVE EARLY, ANTICIPATE PROBLEMS

If it is possible, go to the site of your booth and table one day early. Did they locate your booth where they said they would? Are electrical power (if you need it) and other promised resources readily accessible? Will you need to bring extension cords, another table, or other supplies you thought would be provided? Are parking passes and fair passes ready for you to pick up and distribute? Not all of these issues will apply to all of your events, but the point is to think about solving problems before your event begins.

7 THANK YOUR VOLUNTEERS AND GUESTS

Always thank your volunteers profusely. Take everybody to pizza within a week or two of the event. Mention those who helped out in any way, especially those who came through when problems arose or those who went above and beyond the call of duty. The best time to begin speaking is a few minutes after everyone has their food (people settle down to eat and there are fewer interruptions from restaurant staff).

Discuss how the event went generally, what went right and what went wrong. Grant credit for successes widely and lavishly. When discussing what went wrong, avoid finger pointing and concentrate instead on how execution can be improved in the future.

In an ideal world, volunteers would need no motivation other than the desire to fight for freedom. But in the real world, volunteers are motivated by recognition among their peers. Recognition of good workers can also inspire dormant members to become active so they be recognized too. Never underestimate the motivating power of an “ego stroke”.

TIPS TO REMEMBER

a. Grassroots comes from the bottom up.

Leadership comes from the top down. As a chapter leader, set an example by making sure to work a few shifts in the booth. It is fine to delegate tasks (we all have busy lives), but make sure you follow up to make sure all gets done.

b. I can’t stress this enough: BE FRIENDLY. Your goals should be outreach and name-recognition - voter registration is just the gravy. If a someone hostile to your organization wants to register at your table, help them with a smile. Give them some material to read and thank them. Maybe they’ll read something they like. Maybe in a couple of years, they’ll be looking for a new political home and remember how friendly you were.

c. Have a nice look to your table. Spend a few bucks and get a nice banner to go across the front of the table. Example: three-line vinyl banner, about 5 feet long. First line: YOUR ORGANIZATION, second Line: “Your County”, third line: “Register to Vote”.

d. Keep your conversations short. Your goal is to communicate with a lot of people. DON’T get dragged into long philosophical discussions or, even worse, get sucked into arguments with people who don’t agree with you. Remember, you want to make contact with as many people as possible. Practice graciously ending conversations. If you need a break, take one. Sometimes it helps to freshen up every hour or so.

e. Have fun! This shouldn’t be drudgery. It should be exciting. This is true grassroots work and, in the long run, one of the most effective forms of political activism you can engage in.



Basics of Oregon's Local Budget Processes 101

BY RICHARD P. BURKE

INTRODUCTION:

If you are a public official, may one day be a public official, or are an activist who monitors government boards and commissions, you will want to become familiar with Oregon's local budget process. NOTE: This training document is not a legal document, nor is it intended to constitute legal advice. Instead, it is a descriptive document about the basics of Oregon's local budget process.

1 WHAT ARE THE BASICS OF LOCAL BUDGET LAWS

Almost every local government in Oregon, regardless of size, must prepare and prepare and adopt a budget. With few exceptions, budgets must be annual or biennial. Schools, counties, cities, ports, rural fire districts, special district, urban renewal agencies, and special districts must all comply. Laws governing local budget processes can be found in Chapter 294 of Oregon's Revised Statutes.

2 GET APPOINTED TO A BUDGET COMMITTEE

Budget Committees are a government body's fiscal planning advisory committee. The committee consists of the members of the governing body plus an equal number of qualified district voters appointed by the body. With few exceptions, all qualified voters of the district may serve on a Budget Committee.

Budget Committees are EXCELLENT places for activists to begin direct involvement in local government. Many of these positions remain vacant for years at a time. You can apply by filling out the appropriate forms at your county or city elections office. You do not need prior experience. You can learn on the job. Dive in! Committee members are appointed to three-year terms usually staggered. The Budget Committee must select a presiding officer who presides over Budget Committee meetings. Members are unpaid.

Once a "proposed" budget is distributed as described below, Budget Committee members may request any information required during consideration of the proposed budget from any district officer or employee. Budget Committees may amend the "proposed budget." Budget Committees, through the district's chief administrative officer, may require staff members to attend Budget Committee meetings.

3 WHAT ARE THE NINE STEPS OF THE BUDGET CYCLE

a. A "Budget Officer" is Appointed. This person works under the supervision of the governing body or a chief executive who works under that body.

b. A "Proposed" Budget is Prepared. The Budget Officer is responsible for creating a proposed budget and presenting it to the governing body's budget committee.

c. The Budget Officer Publishes Notice. A "Notice of Budget Committee Meeting" must be published. If only in a newspaper, it must be published twice, five to thirty days before the first Budget Committee hearing. If it is published on the governing body's website, it must appear at least ten days before the hearing and notice must be published once in a newspaper five to thirty days before (the newspaper notice must provide the website). If the notice is mailed, it must be provided ten days before the hearing.

If more than one meeting is held to solicit public testimony, only the first is required to be noticed as described above. Subsequent meetings may be noticed in accordance with notice requirements applicable to the governing body when it meets.

d. The Budget Committee Meets. At least one meeting must be held to receive the proposed budget and hear the public. As soon as members of the Budget Committee receive the proposed budget, it becomes a public document. Members of the Budget Committee may not deliberate toward any decision before the meeting, and may not deliberate outside of a public meeting. If not at an initial budget committee meeting, the public must be allowed to offer testimony at a subsequent meeting during this process. All meetings are open to the public.

e. Budget Committee Amends and/or “Approves” Proposed Budget. The proposed budget is “approved” when the Budget Committee is satisfied with the document after making any amendments. An “approved” budget is not yet “adopted,” but still a work in progress. If the budget includes income from a new or increased “ad valorem” tax, usually a property tax, the Committee must approve an amount or rate to be certified by a public assessor.

f. Publish a Budget Summary and Notice of Budget Hearing. Once the proposed budget is approved by the Budget Committee, a budget hearing must be held by the governing body. Notice of the hearing, and a summary of the budget must be published thirty days or more before the hearing. This information must be provided in the newspaper, by mail, or by hand delivery. If no area newspaper exists and estimated expenses in the budget do not exceed \$100,000, the information may be posted in three conspicuous places at least twenty days before the hearing.

g. A Public Hearing Must be Held on the Approved Budget. More than one hearing may be held. All hearings are open to the public. These hearings are to hear public testimony.

h. The Budget is Adopted, Appropriations are Made, and Tax Levies are Declared. The governing board finally “adopts” the budget. It may make changes before or, within narrow constraints, after it is adopted, but no changes can be made after the beginning of the next fiscal year, which generally begins on July 1. The governing body must enact resolutions to formally adopt the budget, make appropriations and, if needed, levy and categorize any tax.

i. Budget is Filed, and Any Levies are Certified. Districts levying a property tax must submit to the county assessor’s office on or before July 15. Districts not levying a property tax must send a copy of its adopting resolutions to the Department of Revenue before July 15. Property taxes must be approved by voters. The time and scope of such elections are regulated.

a. Get on a Budget Committee! If we are going to keep our republic, we need to take personal responsibility for its governance, yes? See if you can get appointed to a Budget Committee or elected to a local office on a body that automatically serves on a budget committee. There is no better way to be involved than to be one of the decision makers! Also, it is fascinating work!

b. Get Involved EARLY IN THE PROCESS! If you can’t get on the Budget Committee, do what you can to get involved EARLY. You will have the best chance to influence a budget if you get involved BEFORE the Budget Committee approves the proposed budget. While it is still possible to effect change after that by lobbying Budget Committee members, it is harder. All too often, people show up at the final budget meeting where budgets are adopted. While it is technically possible to lobby for changes at this point, in reality the die is already cast. Get involved EARLY!

c. Do Your Homework! Go to the governing body you are interested in. Ask for past budgets. Ask for the minutes of recent Budget Committee hearings. Study the materials. If you find items you are interested or have questions about, make appointments to see members of the Budget Committee including members of the governing board. You might also be able to meet with staff. It is best to do this BEFORE the proposed budget is approved, but the earlier the better!

d. Find the Timelines and Make Your Plan. Go to your governing body and find out what their timeline is to accomplish the nine steps outlined above. Based on the timeline, make your plan. Include fellow activists. Plan Letters to the Editor in your local newspaper. Plan phone campaigns. If you make your voice heard, you CAN have an impact, particularly if you start early!

e. Get More Training! Go to the WLN website and get companion training documents on How to Lobby Public Officials, Testify Before Public Boards, Write Letters to the Editor, and more. Learning these skills will not guarantee success, but they will make success much more likely! Even if you fail the first time, acquiring and sharpening these skills will help you and your friends build reputations as competent activists and equip you for future battles and projects!

CONCLUSION:

This offers a basic introduction and some rules of thumb relating to Oregon’s local budget processes. Speak to an attorney or contact the Oregon Department of Revenue if you have questions. While the above provides good rules of thumb, there are exceptions and requirements associated with particular circumstances. You are encouraged to learn more by visiting the website of the Oregon Department of Revenue and reading “Budgeting in Oregon Manual” and “Local Budgeting Manual.” You can also refer to ORS Chapter 294 online.



Basics of Washington's Local Budget Processes 101

BY RICHARD P. BURKE

INTRODUCTION:

If you are a public official, may one day be a public official, or are an activist who monitors government boards and commissions, you will want to become familiar with Washington's local budget process.

NOTE: This training document is not a legal document, nor is it intended to constitute legal advice. It offers a place to start for those who want to get involved in local budget processes!

1 WHAT ARE THE BASICS OF LOCAL BUDGET LAWS

Almost every local government in Washington, regardless of size, must prepare and adopt a budget. Most are annual, some are biennial. Municipal governments and Special Purpose Districts must all comply. Legal requirements vary according to a community's population: Under 300k, Chapter 35.33 RCW. Over 300k (Seattle), Chapter 35.32a RCW. "Code Cities," 35a.33 RCW.

2 GET APPOINTED TO A CITIZEN ADVISORY BOARD

Citizen Advisory boards tasked with budget work can be an important part of participating meaningfully in the budget process and your community's future. Any citizen who is a resident of a local government or lives within the jurisdiction of a Citizen Advisory Board may apply. These boards are EXCELLENT places for activists to begin direct involvement with local government. Apply by filling out the appropriate forms at your county or city elections office. Members are unpaid. Experience is typically not required.

3 WHAT ARE THE ELEVEN STEPS OF THE BUDGET CYCLE

a. Revenue Assessment is Requested (Call to Budget). The process begins when the clerk requests all department heads and those in charge of municipal offices to prepare detailed estimates of probable revenues from sources other than property taxes. This must happen on or before the second Monday in September or at such time as the city or town may provide for by ordinance or charter. The clerk is responsible for preparing the estimates for interest and debt redemption requirements and all other estimates not prepared by department heads including the amount to be raised by property taxes and unencumbered fund balances estimated to be available at the end of the fiscal year.

b. Estimates Are Filed with Clerk. On or before the fourth Monday in September, or at such time as the city or town may require by ordinance or charter, all department heads and program managers must file their estimates of revenue and expenditures with the clerk.

c. Estimates Presented to the Chief Administrative Officer (CAO). On or before the first business day in October, prior to the beginning of the fiscal year, the clerk must submit the proposed preliminary budget to the mayor, city manager, or city administrator (CAO). The preliminary budget should offer the complete financial program, showing expenditures requested by each department and the proposed sources of revenue by which those programs will be financed. The CAO may make modifications, revisions or additions as he or she sees fit.

d. Revenue Estimates - Property Taxes to be Raised. Once the CAO approves the preliminary budget, it is presented to the legislative body along with updated information on revenues. The legislative body must hold a public hearing on revenue sources for the budget being developed including consideration of possible increases in property taxes.

e. Preliminary Budget Filed with the Clerk. At least 60 days before the ensuing fiscal year, the budget and the budget message the CAO prepares the preliminary budget in detail, making revisions or additions to the reports of department heads as deemed advisable. Once filed with the clerk, it is regarded to be the recommended final budget.

f. Preliminary Budget Filed with Legislative Body. Once the proposed budget is approved by the Budget Committee, a budget hearing must be held by the governing body. Notice of the hearing, and a summary of the budget must be published thirty days or more before the hearing.

3 WHAT ARE THE NINE STEPS OF THE BUDGE CYCLE (CONT)

g. Public Notice of Budget Hearings. No later than the first two weeks of November, the clerk publishes notice at least once a week for two consecutive weeks that the preliminary budget has been filed. Public notice is required for each hearing. A public hearing with notice will be required for the setting of property taxes and preliminary hearing requirements as found in statute.

h. Preliminary Budget is Made Available to the Public. The clerk of the governing body makes the preliminary budget available no later than six weeks before January 1st. Full budget documents are available, but many municipal governments provide summary or abbreviated documents, commonly referred to as “Budgets-At-A-Glance.”

Abbreviated or summary budget documents can be good starting points for people beginning to learn about budgets but be careful - it is possible that they can omit or obscure important budget features and details. Recommendation: Get both budget documents. Go through the summary document first, then drill down into the full budget document for details. It is perfectly acceptable for you to ask questions of members of the governing body and/or staff.

i. Public Hearings on the Budget. Hearings on all revenue sources, including proposed property taxes must be held by Nov.30, before any such taxes can be adopted. After the hearing, even at the same meeting, a board may pass an ordinance authorizing the tax. A preliminary hearing must be scheduled on or before the first Monday in December. This hearing is on the budget, or parts of the budget. The board may require department heads to be present.

j. Budget is Adopted. The budget is adopted for the coming fiscal year after public hearings and before the end of the calendar year. The budget is adopted as part of a budget ordinance. The ordinance can take many forms. These may depend on whether the budget is adopted at the fund or department level and whether it includes the ending fund balance or displays appropriations separately from the ending fund balance.

k. Budget is Filed and Any Levies are Certified. This takes place immediately after adoption. Budgets must be filed with the Association of Washington Cities and “code cities” must also transmit them to the state auditor’s office.

4 HERE’S HOW TO HAVE AN IMPACT ON THE LOCAL BUDGE PROCESS

a. Get Involved EARLY IN THE PROCESS! The earlier in the process you engage, the better your chances will be of affecting the outcome. Be aggressive, but always very polite – find out when budget information will be available and when hearings will be scheduled. All too often, people show up at the final budget meeting where budgets are adopted. While it is technically possible to lobby for changes at this point, in reality the die is cast. Get involved EARLY!

b. Do Your Homework! Go to the governing body you are interested in. Ask for past budgets in addition to budgets under development (if available). Ask for the minutes of recent budget hearings. Study the materials. If you find items you are interested or have questions about, make appointments to see members of the governing board and any advisory boards. You might also be able to meet with staff. It is your right to contact local officials and ask questions!

c. Find the Timelines and Make Your Plan. Go to your governing body and find the exact dates upon which the steps outlined will happen. Based on the timeline, make your plan. Include fellow activists. Plan Letters to the Editor in your local newspaper. Plan phone campaigns. Take advantage of your social networks. Call into talk radio shows. Testify before public boards. Meet with public officials. You CAN have an impact, particularly if you start early!

d. Get More Training! Go to the WLN website and get companion training documents on How to Lobby Public Officials, Testify Before Public Boards, Write Letters to the Editor, and more. Learning these skills will not guarantee success, but they will make success much more likely! Even if you fail the first time, acquiring and sharpening these skills will help you and your friends build reputations as competent activists and equip you for future battles and projects!

CONCLUSION:

This offers a basic introduction and some rules of thumb relating to Washington’s local budget processes. Speak to an attorney or contact the Washington Department of Revenue if you have questions. You can learn more by visiting the website of the Washington Department of Revenue and reading “Budgeting in Washington Manual” and “Local Budgeting Manual.”



Elements of Good Political Messaging

BY RICHARD P. BURKE

TYPES OF POLITICAL MESSAGES:

Effective political messages can mean the difference between a chance for victory and almost certain defeat during election, lobbying, and other kinds of campaigns. At least four kinds of messages should be developed for any campaign:

1 CORE MESSAGE

This is the central message for your campaign. It is the reason for running your campaign and the reason for people to vote for your candidate or support your position. The message should be attractive and compelling, expressing a vision for the future. Abbreviated example: *"We can solve these problems, and I know how. Let's solve them together because our best days are ahead of us."*

2 POLICY-BASED MESSAGES

Here, in each message, ONE and ONLY ONE idea is conveyed. Each policy-based message should promote an idea by describing it and its importance. Every policy-based message should be consistent with the core message. Abbreviated Example: *"We need school choice to put our schools back into the hands of parents."*

3 CHARACTER-BASED MESSAGES

These messages focus on a person's character, past, qualifications, and skills showing that they are fit for the office they are running for. In the case of political action committee messaging, a "character-based" message could show why an organization, or its leaders are credible advocates for a campaign. Abbreviated example: *"John Doe has the courage, experience, and character to put us back on track."*

4 VALUE-BASED MESSAGES

These messages relate to social values being advanced by the campaign. These messages should be consistent with the core message. Sometimes, value-based messages can be more politically compelling than any other kind of message. Abbreviated example: *"Vote John Doe because government should serve the people, not the other way around."*

COMPONENTS OF GOOD MESSAGING:

Nothing guarantees that political messaging will work in the ways candidates and issue advocates want it to. But if your messaging includes all the components shown below, it will be much more effective than if it does not.

1 YOUR MESSAGES SHOULD BE CLEAR AND CONCISE

Attention spans are short, and there are a lot of candidates and issues for voters and lawmakers to consider. Your messages should be very short, very clear so they cannot be misunderstood by people not informed in an issue as much as you are and, in the interest of brevity, your messages should be very concise.

2 YOU NEED AN EFFECTIVE MESSENGER

Sometimes, the person delivering a message can be more important than the message itself. For example, if a candidate is accused of doing something shady during a campaign, another public official supporting the candidate may be more effective in quashing the accusation than the candidate himself/herself. In the case of education legislation, an endorsement from a professional educator may be more compelling than that of a political committee's Executive Director.

3 INCLUDE A CALL TO ACTION

Your message needs to make clear that your audience has a role to play in the future you are trying to build with your candidacy or your issue advocacy. Something as simple as, *“...be a part of a better future...” can work for a candidate or ballot measure campaign. “With your help, we can [pass/defeat] this proposal which promises to [help/hurt] our state so much.”*

4 MAKE YOUR GOALS CLEAR, SHORT, AND SIMPLE

When it comes to political messaging, the attention span of most voters and officials tends to be short. You must therefore put all of the elements in your message at the front with a simple statement. If you do, and your audience is interested, you may get the chance to elaborate. If you don't, your message will be lost. Something like, *“...my ideas will improve academic achievement and economic opportunity.”*

OTHER TIPS:

You may not be able to incorporate all of these into all your messages but, when you can, the impact of your messaging will be improved.

1 USE EMOTION

Often an emotionally compelling story will prove more compelling than a filing cabinet worth of statistics. Logic is important, but most people are ultimately driven by emotions, not cold logic. Appeal to the feelings of your audience whenever you can. Make your statements personal whenever you can.

2 INCLUDE YOUR AUDIENCE

Wherever possible, use words like “we,” “together,” and “us” instead of too many “I’s.” You do not want to appear arrogant. More importantly, using such words can draw people in, show your audience that they have a role to play in building a better future, and demonstrate that they will share the benefits of your candidacy or the legislation you are fighting for.

3 RELATE TO YOUR AUDIENCE

Make sure you convey your message in such a way as your audience believes that you are “one of them” or that you are on “their side.” Use words that your audience uses – stay away from jargon. Convey ideas in ways that relate to the experience of your audience.

4 BE AUTHENTIC

Most candidates and issue advocates who try to be something they are not or who otherwise come off as insincere are quickly sniffed out and rejected. People are hungry for authenticity. Be sincere and be real.



Developing A Good Campaign Calendar As A Candidate Campaign Manager, or Activist

BY RICHARD P. BURKE

A good campaign calendar is indispensable to any well-run campaign. Unless you are running unopposed or enjoy uncommon advantages, you will need a well-organized and well-managed campaign calendar to win your election. No two calendars will be alike, but there are things in common with successful campaign plans that can help you get one together.

A good campaign calendar is also indispensable to any serious political activist. Even if you are not a candidate, but a serious volunteer, a campaign calendar can do a lot to ensure that your time and skills will be effectively deployed throughout an election cycle.

1 CHOOSE A PLATFORM TO MAINTAIN YOUR CALENDAR ON

a. IF YOU ARE A CANDIDATE OR ARE RUNNING A CAMPAIGN. If you are a candidate or are running a campaign or ballot measure campaign involving more people than just yourself, use an online calendar and designate one person to maintain it. Google Calendar and Basecamp are examples of such platforms. Each platform has different features, benefits, and costs (some are free) suitable for different campaigns. Online calendar platforms allow all necessary people to view the calendar in real time no matter where they are, minimizing the chance that something could be missed because they don't have the current copy of a paper calendar. Unless emergencies arise, all requests to add or remove items from the calendar should go through this person. Multiple "chefs" will result in confusion and chaos.

b. IF YOU ARE AN ACTIVIST/VOLUNTEER. If you are working as a "lone wolf" a paper calendar can suffice but consider using an online calendar. Online calendars can be laid out for each of the campaigns you are active in, can be changed quickly, and can be viewed at home or on your phone. Changes made anywhere appear everywhere. If you like working with paper, online calendars can always be printed out. In some cases, your campaign calendar(s) can be overlaid on top of a campaign's online calendar or a personal calendar.

2 PLAN BACKWARD

Start your voter contact planning from after election Election Day (win or lose there are always things to do at the end of an election) and work backwards to the current day. Doing so will help to ensure that you will

allot sufficient time to do the critical things which need to be done as Election Day approaches.

3 BEGIN WITH KNOWN DEADLINES AND LAWS

Plan your timeline within the framework of the election law. Does your specific election law specify certain dates by which certain activities must be accomplished and dates before which other activities are prohibited? Filing deadlines, fee payment deadlines, petition deadlines (if applicable) dates on which normal, absentee, and out-of-state ballots are mailed and voter registration deadlines are examples of such deadlines.

4 QUANTIFY YOUR GOALS

All of your voter contact activities and other campaign activities should be quantifiable wherever possible. Poor goals might be "Raise Money" or "Knock on Doors" while better ones would be "Raise at least \$5,000 by October 1st" or "Knock on 500 doors by October 1." How many events will you hold? How many press releases will you send out? How many posters or signs will you have to put up? How many brochures will you have to print and distribute? How many doors should you and your supporters have knocked on? Phone calls? Get Out The Vote (GOTV) contacts? How many social media posts should be made? There are so many such metrics to consider that it is impractical to list them here; but YOU will need to list as many as will apply to you. Quantification is important for two reasons:

a. TO MEASURE PROGRESS. Quantifiable goals will help you measure the progress of your campaign. If by December 10th your team has knocked on 5,000 doors, is that good or bad? If your goal is 6,000, it's good; if your goal is 60,000, it's bad. If you have not set a quantifiable goal, you have no idea.

b. TO MANAGE SPENDING, TIME, AND RESOURCE DEPLOYMENT. Quantifiable goals will help your budgeting process. You cannot reasonably compare the relative costs and benefits of brochures vs. posters vs. radio ads unless you know how many of each you are talking about. If you are an activist, a campaign calendar can help you to maintain balance between your private life, your work life, and volunteerism.

5 DETERMINE NECESSARY ACTIVITIES AND WHEN THEY SHOULD TAKE PLACE

For each goal, plan the activities that will be required to reach that goal. When will these activities take place? When will the planning for them take place? Who will be responsible for the planning, execution, and other aspects of your campaign activities? If you plan to put up 2,500 lawn signs by September 1, by what date should you take your poster design to the printer? When should the graphic design of the signs take place? When will the people to put up the lawn signs be recruited and when will they put up the lawn signs? It can get very complicated and involved.

The kinds of activities which can be undertaken which need to be placed on a calendar are almost endless; you will need to determine what those activities are. If it isn't possible to do them all, it will be necessary to prioritize. Getting Out The Vote (GOTV) is typically critical. Neighborhood canvassing, phone canvassing, sponsoring, or participating in public events, and many other activities should find their way onto your calendar.

6 DETERMINE NECESSARY PEOPLE AND RESOURCES

Do not forget to plan for the resources you will need to accomplish each activity. As you look at your timeline, figure out for each week how many people and how much money you will need for the activities planned for that week. Where will the resources come from? Include those pieces of information on your calendar (or link them to your calendar) so you can keep track of who is responsible for what.

7 BE ADAPTABLE

There are deadlines and events which cannot be changed. Such static events will go onto your calendar and will remain frozen there. But in most campaigns, things come up on short notice, unexpected events transpire, priorities must be changed, so do on. If you are an activist, things may arise in your private or work lives which will require some juggling. It is therefore important that you be ready to adapt your calendar as needed to accommodate the dynamic nature of the political season.

NOTE:

This document was adapted by Richard P. Burke from the *"POLITICAL CAMPAIGN PLANNING MANUAL: A STEP BY STEP GUIDE TO WINNING ELECTIONS"* by J. Brian O'Day of the National Democratic Institute for International Affairs.



Protest Event Etiquette

BY RICHARD P. BURKE

TEN TIPS: FOR GOOD PROTEST ETIQUETTE

1 SAFETY FIRST

Stay off the roadway, do not block pedestrians and keep out of driver's vision of traffic on corners. We don't want anyone getting hurt at any protest. Keep people clear of cars, trucks, bicycles, and other hazards.

2 DO NOT BLOCK OR INHIBIT PATRONS

Do not block or inhibit patrons from using the post office or any other business. It is illegal for protesters to block, prevent, or otherwise impede people from doing their normal business at public institutions.

3 AVOID ATTACKING ANY PERSON OR GROUP

Avoid attacking any person or group physically or verbally. Attack ideas or actions like excessive spending, debt, or the bailouts. Do not let this get personal - people come and go. We are in a war of ideas.

4 SMILE

We are out here to support our cause and we are happy about it! Most successful movements win because they exude optimism and hope. Protesters are sometimes angry, but the future is worth fighting for - THAT is a cause for optimism!

5 DO NOT RESPOND TO NEGATIVE PROVOCATIONS

If opponents goad you into losing your cool, they will win the day. If you maintain your composure, dignity, and focus, your opposition will look petty, and you will have more credibility.

6 DO NOT RESPOND TO (OR CONFRONT) OPPONENTS

Don't respond to (or confront) opponents who may be exercising their First Amendment rights. Opponents don't have the right to interfere with your protest but, like you, they have the right to protest. As long as they are not interfering with your protest, it is best to ignore them.

7 AVOID PHYSICAL CONTACT

Avoid physical contact and direct confrontation with infiltrators. If an infiltrator begins a counter demonstration in your midst, it is perfectly acceptable to peacefully surround this person with people holding your signs. Be careful not to touch them, invade their personal space, or confront them personally.

8 LOOK OUT FOR EACH OTHER

Help your fellow protesters - the elderly, the young, the disabled, and those who may need help with children. We're all in this together! If the situation becomes dangerous, make safety your top priority. Protect your people and their credibility as peaceful protesters.

9 WORK WITH AUTHORITIES IN ADVANCE

Make sure you have any required permits before holding your protest. Let the police know about your plans and work with them to avoid problems.

10 CALL POLICE FOR SERIOUS PROBLEMS

If you are assaulted, intimidated, or see any serious problems, don't try to handle the problem yourself - call the police. Don't respond to harassment: Report it by finding a police officer or dialing 911.

CONCLUSION: SET A CLEAR START AND END TIME

Many peaceful protests are ruined by violent activists who come in at the end and cause problems. People can get hurt, and violence will usurp your event's message in any news coverage of your protest. *But if you set a clear ending time, then leave at that time with a declaration that your protest is over for the day, violent activists who have nothing to do with your event can be more easily condemned and disavowed by your people and your cause.* As most post-protest violence happens after dark, particularly in cities, make sure your protest ends before dusk.

When protesting, we need to be like Dr. King or Gandhi: Peaceful, tolerant but TOTALLY resolute. Have a peaceful and enjoyable event. Good Luck!

KNOW YOUR RIGHTS

You have the right to protection from the following offenses against persons and public order. If you witness any of these crimes, call 911 and report it immediately.

1 ASSAULT

ORS 163.160, 163.165, 163.175, 163.185.

“...the person intentionally, knowingly or recklessly causes physical injury to another”

2 MENACING

ORS 163.190.

“...by word or conduct the person intentionally attempts to place another person in fear of imminent serious physical injury.”

3 RECKLESS ENDANGERMENT

ORS 163.195.

“...the person recklessly engages in conduct which creates a substantial risk of serious physical injury to another person.”

4 COERCION

ORS 163.275.

“...the person compels or induces another person to engage in conduct from which the other person has a legal right to abstain, or to abstain from engaging in conduct in which the other person has a legal right to engage, by means of instilling in the other person a fear that, ...the actor or another will: ...Unlawfully cause physical injury ...damage to property... [commit] a crime; or ...Falsely accuse some person of a crime or cause criminal charges to be instituted against the person...”

5 RIOT

ORS 166.015.

“...if while participating with five or more other persons the person engages in tumultuous and violent conduct and thereby intentionally or recklessly creates a grave risk of causing public alarm.”

6 DISORDERLY CONDUCT

ORS 166.025.

“...if, with intent to cause public inconvenience, annoyance or alarm, or recklessly creating a risk thereof, the person:

- a. Engages in fighting or in violent, tumultuous, or threatening behavior.
- b. Makes unreasonable noise.

6 DISORDERLY CONDUCT (CONT)

- c. Disturbs any lawful assembly of persons without lawful authority.
- d. Obstructs vehicular or pedestrian traffic on a public way;
- ...
- g. Creates a hazardous or physically offensive condition by any act which the person is not licensed or privileged to do.”

7 HARASSMENT

ORS 166.065.

“...the person intentionally: ...Harasses or annoys another person by:

- a. Subjecting such other person to offensive physical contact*; or
- b. Publicly insulting such other person by abusive words or gestures in a manner intended and likely to provoke a violent response”

8 INTIMIDATION IN THE 2ND DEGREE

ORS 166.155.

“...the person, [because of the person's perception of the other's race, color, religion, national origin or sexual orientation, intentionally]:

- a. Tamper or interferes with property, with the intent to cause substantial inconvenience to another...
- b. ...subjects another to offensive physical contact* ...; or
- c. ...subjects such other person to alarm by threatening:
 - A. To inflict serious physical injury upon or to commit a felony affecting such other person, or a member of the person's family; or
 - B. To cause substantial damage to the property of the other person or of a member of the other person's family.”

9 INTIMIDATION IN THE 1ST DEGREE

ORS 166.165.

“...Two or more persons acting together commit the crime of intimidation in the first degree, if the persons [, because of their perception of the other person's race, color, religion, national origin or sexual orientation]:

- a. A. Intentionally, knowingly, or recklessly cause physical injury to another person...; or
- B. With criminal negligence cause physical injury to another person by means of a deadly weapon ...

- b. Intentionally... place another person in fear of imminent serious physical injury; or
- c. Commit such acts as would constitute the crime of intimidation in the second degree, if undertaken by one person acting alone.”

NOTES

* “Offensive physical contact” includes striking, slapping, shoving, kicking, grabbing and similar acts that are an interference with the contactee, regardless of whether they produce any pain or discomfort... Spitting on another can be offensive physical contact within meaning of this section.

† May be unconstitutional...: violates section 8, Article I, Oregon Constitution, because it is directed to speech. State v. Harrington.

NOTE: Some of these crimes are terrorist acts under the Patriot Act, if they are committed for the purpose of influencing the political process.

DISCLAIMER: This information is offered only for the purpose of increasing awareness of possible legal considerations and to encourage you to seek law enforcement assistance and qualified legal counsel if you feel your rights have been violated. **IMPORTANT:** **THE AUTHOR OF THIS DOCUMENT IS NOT AN ATTORNEY AND THIS DOCUMENT DOES NOT CONSTITUTE LEGAL ADVICE IN WHOLE OR IN PART.**



Canvassing Your Neighborhood

BY RICHARD P. BURKE

1 WHAT IS CANVASSING

Political campaigns initiate a grassroots movement to mobilize volunteers, interact with supporters, and secure a promise of their vote. Such canvassing is done with the objective of:

- a. Collecting voter data (voter ID)
- b. Discussing issues and standpoints
- c. Convincing swing voters to vote for you (persuasion efforts) or influence confirmed supporters to vote on election day (GOTV efforts)

There are multiple ways political campaigns canvass supporters. The most popular being:

- a. Door to door canvassing
- b. Phone OR text canvassing

Studies have proven direct outreach to be the most impactful way of election canvassing. After all, two individuals discussing common interest and agony topics are bound to reach a consensus on them.

2 IS POLITICAL CANVASSING SOLICITING

No! Often, people mistake political canvassing for soliciting. However, canvassing has been distinguished as different from commercial solicitation by law. The First Amendment protects non-commercial speech. That includes discourse that “*does more than inform private economic decisions and... provid[e] information about the characteristics and costs of goods and services...*” Political speech is also a part of this non-commercial speech. So, if a notice board or individual says that solicitors are not allowed in a neighborhood, volunteers can still legally canvass it. Still, use your best judgment. You don’t want to antagonize people. (*Watchtower Bible and Track Society of New York v. Village of Stratton - 2002*).

3 WHAT ARE THE LAWS ON POLITICAL CANVASSING ON PRIVATE PROPERTY

- a. Field canvassers are legally allowed to be on private property and knock-on doors. This includes homes or neighborhoods that have “No Soliciting” signs. But beware, not everyone understands the difference between soliciting and canvassing. You may have to be very patient with such house owners. If they insist that you are not welcome, it’s best not to push your luck.
- b. If a property has “No canvassers” or “No Trespassing” signs, stay away.
- c. You have the right to offer campaign literature to voters, even in gated communities with HOAs.
- d. Political canvassers are legally permitted to knock on doors, interact with voters, and distribute literature without any ‘solicitor’s permit.’ (*Lovell v. the City of Griffin, Georgia - 1938*).
- e. You are not required to give prior notice before canvassing neighborhoods.
- f. The U.S. Supreme Court has ruled that municipalities cannot restrict canvassing between 9 am and 9 pm on all seven days of the week. (*Citizen Action Coalition v. the Town of Yorktown, IN - 2014*).

4 OTHER THINGS TO KNOW

- a. Studies have shown that a 3-10 minute interaction between volunteers and voters increases the chances of persuasion. Political leaflets can add to that convincing effort.
- b. You can leave leaflets on doorknobs, between doors, or hand it over in person. Make sure you leave it in a place that is easily visible to the voter and does not fly away or get damaged before the voter sees it. **However, putting campaign literature in a mailbox is a federal offense.**

- a. Prepare Yourself.** Check the weather and dress appropriately. Bring a backpack with water and some food (bring some to share). Make sure you have comfortable shoes. If possible, wear a button or a badge on a lanyard to for identification. Have a charged cell phone with you.
- b. Make Sure You are Equipped.** Try to get a “walking list” that lists the people in the homes you are canvassing in the order they appear on the street. A good walking list will have some information about each person and a place to make notes. Sometimes this is done electronically with a tablet device. If so, make sure it is fully charged. Always work in pairs for safety.
- c. Have Your Pitch Ready.** Think about what you are going to say. Your organizer may have a script for you. When in the field adapt the script with your own words to sound natural but discuss this with your organizer first. You do NOT need a “solicitor’s permit.” Always begin by introducing yourselves by name and tell people who you are representing.
- d. Respect Property.** Use sidewalks where you can. Avoid cutting across properties to save time. Be careful of what you say as you approach homes; many now have “smart doorbells” with microphones and cameras that record constantly.
- e. Keep Conversations Short.** Interacting with people is good, but you are trying to interact with as many people as possible. If you hit it off with someone, you could spend 30 minutes or more at one door. If you sense this could happen, agree on a time and place to meet, politely end the conversation, and go to the next door.
- f. Don’t Take Anything Personally.** There will be people who are rude, people who will slam their doors on you, and people who will simply be jerks. Remember – these people know nothing about you or your life. It is important not to take such incidents personally. You are not asking for their money or their time, other than the time that they spend talking with you. You are offering them information they can use to exercise their political rights.
- g. Take Covid Precautions.** Whatever your views on Covid precautions, be prepared to respect the views of the people whose property you will be approaching. Have a mask ready and put it on if the people you speak with ask you to (you can take it off later). Avoid shaking hands or interacting physically unless the people you are talking to initiate such contact. After you knock on a door or ring a doorbell, step back about eight feet and do not approach them unless they invite you to do so.
- h. Have Fun and Interact With Your Team Later.** Canvassing can be hard work, but there is no reason it can’t be fun. You will have good and bad experiences, but mostly good ones. You will meet interesting people and, maybe, some new friends or allies. At the end of the day, go out for pizza with your team. Talk about your experiences. You will learn from each other and be even more effective next time with an experienced and proven team!



Participating In Phone Canvassing

BY RICHARD P. BURKE

WHAT IS PHONE BANKING?

In a political context, phone banking is a method of outreach used by political campaigns to identify potential voters, identify supporters, raise funds, get people to attend events, and persuade them to support or oppose a candidate or a cause.

1 HAVE A PHONE LIST OF PEOPLE TO BE CALLED

This list should be provided for you by the ballot measure or candidate campaign you are working on or the political party you will be working with. This list should be a selective list to ensure you will be calling targeted or persuadable voters. Phone lists from county election officials are better than nothing but lists available from commercial sources tend to be more accurate and include more good numbers.

2 PREPARE OR ACQUIRE A PHONE BANKING SCRIPT

It is important that the campaign you are working on has a clear and simple message that can be relayed quickly to the people you call. The campaign you are working with should have a script for you that is designed to project a consistent message.

Typically, you will not want to read a script verbatim as this sounds robotic and unappealing to most call recipients. So, while not changing the message of the script, you may want to paraphrase parts of the script with your own words, contractions, and phrases so you will sound more natural on the call.

3 RECRUIT FRIENDS AND FAMILY MEMBERS TO HELP

If you are not comfortable with phone banking, enlist some friends or family members to help you. Doing so sometimes makes it easier to break tensions and provide mutual support for people who are not used to phone banking.

4 PRACTICE, PRACTICE

There really is no way to acquire real skill in phone banking other than to start doing it. Still, one can partially accomplish this by practicing. With a friend, family member, or fellow volunteer, take turns role playing with one person being the caller and another being a call recipient. Try different kinds of scenarios. It may seem weird and awkward, but it helps. Once you start making real calls, you will be amazed at how quickly you become proficient.

5 DON'T WASTE TIME

Once you start making calls, keep conversations brief. You are phone banking to reach as many people as possible. Avoid conversations and debates. If you want to talk more with a contact, save their information and contact them later – informing them that you will be contacting them personally and not as a campaign representative.

6 PREPARE YOURSELF

Make sure that you have a quiet or business environment to work in. Minimize distractions like barking dogs and children as best you can. If you are using a cordless or cellular phone, make sure it is fully charged. Have a pen ready to make notes. Have your calling list and everything else you need to use your time efficiently.

7 DON'T TAKE ANYTHING PERSONALLY

There will be people who are rude. Many will hang up on you before you finish your first sentence. You may call people who, once they realize they disagree with you ideologically, may be abusive. Some people will simply be jerks.

7 DON'T TAKE ANYTHING PERSONALLY (CONT)

Remember – these people know nothing about you or your life. You are a disembodied voice to them, not a real person with feelings. If these things happen to you, don't take it personally. Many people do lot like to get phone calls, so this will happen a lot.

But remember, you are not asking for their money or their time, other than the time they spend talking with you. You are offering them information they can use to exercise their political rights. You are doing them a favor and you will also talk to wonderful people that you have things in common with. If you can enjoy such positive experiences without taking the negative experiences personally, you can become an amazing phone banker and will have rewarding experiences.

8 HAVE FUN AND INTERACT WITH YOUR TEAM LATER

Canvassing can be hard work, but there is no reason it can't be fun. You will have good and bad experiences, but mostly good ones. You will meet interesting people and, maybe, some new friends or allies. At the end of the day, go out for pizza with your team. Talk about your experiences. You will learn from each other and be even more effective next time with a proven team!



Robert's Rules of Order

BY RICHARD P. BURKE

1 WHAT IS ROBERT'S RULES OF ORDER?

Robert's Rules of Order (RRO) is a collection of rules and procedures intended to govern how deliberative bodies conduct business. It is often referred to as "parliamentary procedure" or a "parliamentary authority." RRO is not the only parliamentary authority, but it is the most common. RRO is used by governments, clubs, organizations, and business entities all over the world.

2 WHAT IS THE POINT OF ROBERT'S RULES OF ORDER?

Robert's Rules of Order ensures that an organization dealing with controversial issues can conduct business efficiently, ensure a predictable process by which business can be conducted and, above all, ensure that everyone is treated fairly and has a chance to be heard. Except as indicated in the rules, majorities usually prevail. But to avoid instability or majoritarian tyranny, there are times when minorities can prevail and times when single people can impact the course of debate.

3 ISN'T ROBERT'S RULES OF ORDER INEFFICIENT?

Doesn't it bog meetings down? When dealing with controversial issues, Robert's Rules can be used to delay, alter, or otherwise manipulate business being conducted through amendments, committee referrals, and other means. While sometimes frustrating to people who want to ram things through, these processes ensure that things are not "rammed through" and that the collective will of the deliberative body can be determined and acted upon.

With a capable Chair or presiding officer, even controversial business can proceed efficiently. When meetings get truly bogged down, it is usually because RRO is not used correctly, is not enforced correctly, or is not enforced at all.

4 WHAT ARE SOME PREREQUISITES TO USING RRO IN OUR ORGANIZATION?

a. Make Sure RRO is Your Organization's Parliamentary Authority. Every deliberative body should be governed by a constitution or set of bylaws that establish an organization's structure, operations, and basic lines of authority. RRO

is intended to provide your organization with a set of rules and procedures used to conduct business within the framework established by your organization's bylaws.

Somewhere in your bylaws there should be an article stating that "Robert's Rules of Order as Newly Revised" (or some other parliamentary authority) shall be used to conduct business throughout the organization in all matters not covered by these bylaws." Without such an article in your bylaws there is no basis on which a leader may unilaterally impose RRO, or any other parliamentary authority, on your organization.

If your organization has no article in its bylaws establishing a parliamentary authority, they should be amended as soon as possible to include one. Until then, your organization can vote, using the inherent authority of its members, to adopt a standing rule stating that RRO will be used as your organization's parliamentary authority.

Remember: Your organization's bylaws can only be changed or suspended by means outlined in your bylaws themselves. Bylaws cannot be "changed" or "suspended" by RRO outside of whatever procedures for doing so are provided for in your bylaws. In terms of primacy, use the following order: 1) Constitution if you have one, 2) Bylaws, 3) Standing Rules adopted with RRO or other parliamentary authority and, 4) RRO or other parliamentary authority.

b. Have a Good Chairperson or Presiding Officer.

A good Chairperson should be: 1) Familiar with RRO, 2) Should be capable of using RRO dispassionately, fairly, and without bias, 3) Should have a temperament enabling he or she to facilitate the meeting rather than use it as a tool to shut people down, 4) Be capable of keeping one's cool when tensions get high, 5) Treat every member of your deliberative body with respect, even when they don't show respect, and protect the dignity of the members and 6) Be willing to assist members of your deliberative body who are unsure about how to apply RRO during business.

c. Have a Parliamentarian. A parliamentarian is a person well versed in RRO who can advise the chairperson about aspects of RRO he or she is unsure of. Ideally, this person is someone considered trustworthy by most of the members of your group. A parliamentarian can advise the chair but has no authority to rule and no authority to overrule the chairperson.

d. A Membership that Acknowledges RRO as Legitimate. People who don't know RRO and get bulldozed by it sometimes call RRO "Robert's Rules of Witchcraft." If RRO is named as your parliamentary authority in your bylaws, such is the source of legitimacy for RRO in your organization. All members of the deliberative body should learn RRO and any organization using it will offer members opportunities to learn it.

5 SOMETIMES RRO SEEMS LIKE OVERKILL. DO WE NEED TO USE IT ALL THE TIME?

YES. Depending on the situation, RRO can be strictly adhered to or used in a more relaxed way. When everyone agrees on things, RRO may not seem necessary. But eventually, people will disagree on important issues. At such times, a chairperson that applies RRO sometimes, but not at other times, may seem unfair and arbitrary, undermining his/her legitimacy as a chairperson, the legitimacy of the governing board, and even that of the organization as a whole. It is important to build and maintain a rules-based culture in your organization and applying RRO consistently in good times and bad will go far in establishing that culture and ensuring that everyone feels they have been treated fairly.

6 WHAT ELSE CAN BE DONE TO PROMOTE THE USE OF RRO IN OUR ORGANIZATION?

a. Encourage Your Members to Learn RRO. Offer them training opportunities. Offer them chances to apply what they learn by building committees and other structures that will advance your organization while developing new leaders who can use RRO.

b. Encourage Your Members to Join the National Association of Parliamentarians. This organization is dedicated to educating people about Robert's Rules of Order and its proper use in deliberative organizations. To join, a 100 question test must be passed. Fortunately, these questions are pulled from a pool of 300 questions which are available (with the answers!) for free. A person carefully studying the 300 questions cannot fail the test and will emerge with a good technical knowledge of RRO. After that, all one needs is practice! Check out the following website: <https://www.parliamentarians.org/>



Personal Get Out The Vote (GOTV) Campaign Worksheet

BY RICHARD P. BURKE

Use this form to build your personal GOTV campaign. Feel free to photocopy this sheet or contact WLN to have a PDF file of this form emailed to you that you can print. Put down information of people you are comfortable dealing with. As you do that, write down when you plan to contact this person initially and to follow up. Then get to work! Don't forget to find out when they plan to vote and don't forget to relate the act of voting to their personal identity. Voters who do both of these things are much more likely to vote. Good luck!

Contact Name: _____

- | | | |
|---------------------------------------------|----------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Registered to Vote | <input type="checkbox"/> Plan to Vote | <input type="checkbox"/> Ballot Received |
| <input type="checkbox"/> Assistance Needed | <input type="checkbox"/> Already Voted | <input type="checkbox"/> When Will They Vote? _____ |

Phone Number: _____ **Email:** _____

Address (IF NEEDED): _____

How Contact Will Take Place (CHECK ALL THAT APPLY):

- | | | |
|-----------------------------------------|--------------------------------------|--------------------------------|
| <input type="checkbox"/> Phone | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |
| <input type="checkbox"/> Email | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |
| <input type="checkbox"/> Meeting | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |

Notes: _____

Contact Name: _____

- | | | |
|---------------------------------------------|----------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Registered to Vote | <input type="checkbox"/> Plan to Vote | <input type="checkbox"/> Ballot Received |
| <input type="checkbox"/> Assistance Needed | <input type="checkbox"/> Already Voted | <input type="checkbox"/> When Will They Vote? _____ |

Phone Number: _____ **Email:** _____

Address (IF NEEDED): _____

How Contact Will Take Place (CHECK ALL THAT APPLY):

- | | | |
|-----------------------------------------|--------------------------------------|--------------------------------|
| <input type="checkbox"/> Phone | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |
| <input type="checkbox"/> Email | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |
| <input type="checkbox"/> Meeting | When (INITIAL CONTACT): _____ | When (FOLLOW UP): _____ |

Notes: _____



WLN Academy

Building Your Campaign Team

www.westernlibertynetwork.org • 503-970-1876

What is a Campaign Team?

A campaign team is a collection of people that will be responsible for different aspects of your political campaign. You should have a written campaign plan that clearly describes campaign objectives and outlines the positions within your campaign team including their responsibilities. Check out the TRAINING tab under the www.westernlibertynetwork.org website for training documents concerning the development of written campaign plans. While candidates running for any office can benefit from this training, the intended audience of this document are first-time candidates and candidates running for local non-partisan offices.

What if I Am Running Unopposed or for a Low-Level Office?

If you are facing one or more opponents, you will likely have to run an active campaign if you want a good chance of winning. In such circumstances, the need for a written campaign plan and a campaign team are obvious. It is possible you may find yourself running with no opponents, particularly if you are running for a small local non-partisan office. In this circumstance, you will almost certainly win even if you do nothing. **You can make that decision, but doing so represents a wasted opportunity.** There are several reasons for running an active campaign even if you face no opponents:

- ❶ **Show Voters That You Don't Take Them for Granted.** Even if you are running unopposed, running a campaign will let voters know that you do not take their votes for granted and that you are serious about serving honorably in the office you are running for. ***Running a campaign will build your reputation as a community leader which you may need to rely upon during your service.*** If people want to know why you are running an active campaign with no opponent, you can say to them that you do not take their votes for granted and that you want to use the campaign to educate people about the position you are running for.
- ❷ **Take Advantage of a "Free Play."** If you are running unopposed, you are almost certain to win barring a dramatic and extremely rare write-in campaign against you. ***If you decide you like politics and think you might want to run for re-election or another position in the future, having experience in running as an active candidate will help you.*** As a candidate, you will make mistakes and learn a lot. If you are running unopposed, run a campaign designed to allow you to make mistakes, learn from them, and then apply what you learn in future races.
- ❸ **Give Other People Experience in Working on a Campaign.** If you decide to run an active campaign, even if you are running unopposed, the members of your campaign team will gain experience they might not otherwise get. Having the experience of a campaign under their belts, even if the candidate is running unopposed, will provide them with training and experience they will be able to apply to your re-election campaign, your campaign for another office, or someone else's campaign in the future. ***You will be part of building cadres of experienced and trained campaign workers, an indispensable asset for the limited-government movement.***

When you are building a campaign team, the following three members are indispensable. If you are running a very small campaign, you may be able to get by with these three campaign team members:

- ① **Candidate.** Ideally, the candidate's job is to raise money (if the campaign is to be funded), interact with voters directly or indirectly through media, and be informed in issues relevant to the campaign. All other aspects of the campaign will ideally be handled by the rest of the campaign team.
- ② **Campaign Manager/Strategist.** In a local race, this person designs the campaign in consultation with the candidate and writes the campaign plan. The campaign manager will usually have a more objective perspective on the race than the candidate, so the candidate should defer to the campaign manager as much as possible. He or she will also be responsible for the plan's execution, securing materials, coordinating volunteers, and attending to other details relating to the campaign. The Campaign manager will also hold and preside over campaign team meetings. He or she will make sure the other members of the campaign team properly do their jobs and provide support where needed.
- ③ **Treasurer / Campaign Finance Compliance Director.** If you are funding your campaign at any level, have a Treasurer. This person will be responsible for tracking income and expenses, managing the campaign's bank account, and reporting (as required by law) all campaign contributions and expenditures. ***The candidate should never be his/her own campaign's treasurer.*** If mistakes are made, opponents will ask, "If he/she cannot properly manage his/her campaign's finances, how can we expect he/she to handle finances for the position he/she is running for? A separate Treasurer will insulate the candidate from any mistakes in finances or reporting. Also, by taking these responsibilities on, a Treasurer allows the candidate more time to be a candidate.

The following positions great to have as a part of your campaign team if you can find people to fill them. If you are running a more sophisticated campaign, you will find them very helpful or even indispensable:

- ④ **Communications / Social Media Director.** This person will be responsible for managing your campaign's Internet presence and social media. He or she will be responsible for establishing and maintaining a website and the campaign's presence on social media outlets. He or she will also be responsible for putting out press releases and helping to set up and manage interviews with newspaper reporters, pod casters, and those related to other media channels.
- ⑤ **Field Director.** This person will take heat off of the Campaign Manager by assuming responsibility for coordinating neighborhood canvassing, doing advance preparation for candidate appearances at civic groups, and coordinating volunteers (or working with a Volunteer Director if there is one).
- ⑥ **Volunteer Director.** This person will be responsible for recruiting volunteers, organizing them, and deploying them wherever they are needed. This person will work hand-in-hand with the Field Director who, in turn, will work with the Campaign Manager.
- ⑦ **Information/Research Director.** This person will make sure that the Candidate has all of the information he/she needs to be knowledgeable on relevant campaign issues, background information about reporters who will interview the candidate, and such. In more advanced campaigns, this person will research the backgrounds of opponents to look for policy stances or other relevant factors that might compromise their suitability for office.
- ⑧ **Scheduler / Candidate's Personal Assistant.** Sometimes these jobs are separated between two people, but for small to mid-sized campaign they can be combined. This person is with the candidate at virtually every campaign function. This person maintains the candidate's schedule. No member of the campaign team should ever commit the candidate to any event until he/she has consulted with the Scheduler. The Scheduler should not commit the candidate to any event without consulting the Candidate and Campaign Manager. This person makes sure the candidate gets what he/she needs during campaign events, helps the candidate gracefully exit campaign events, take notes, and helps the Candidate optimally organize his/her time.

High-Level Campaigns. *As mentioned at the beginning, this training sheet is aimed at candidates running for small, local, non-partisan offices.* That said, it is relevant to campaigns of any size. But if you are running a campaign for a highly competitive or high-level office, you will need all of the people listed above and probably more. You will need professionals, volunteers alone won't cut it. In such races, candidates usually need a **Media Consultant** to develop campaign branding, manage direct mail, radio, television, and/or digital marketing campaigns, and secure advertising space and time. Such campaigns often also need a **General Consultant/Strategist** to take on the Campaign Manager's responsibility for election analysis and campaign plan development.

Don't Be Intimidated! For most small, local, non-partisan races, a few dedicated volunteers is enough to build a workable and effective basic campaign team. For your campaign team, start by building a campaign team of the Candidate, Campaign Manager, and Treasurer as described above. Grow your team as you make decisions on the level of campaign you want to run. ***It is OK to make mistakes, and there is no reason why your campaign can't be a fun adventure!*** ☑