



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

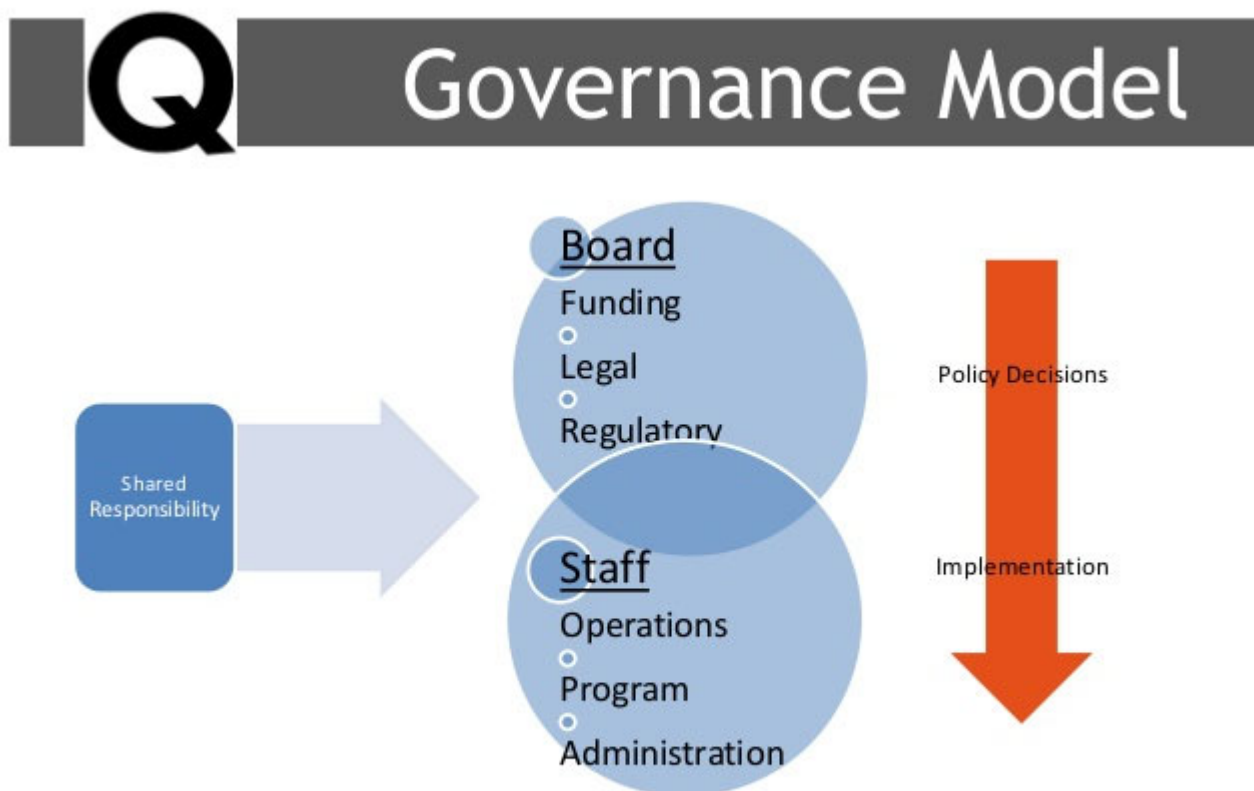
a. Ends and Means. "ENDS" are the results you want. "MEANS" are the ways and methods used to achieve the ENDS. Generally speaking, public boards are concerned with ENDS and staff members are concerned with MEANS. One exception is that boards are responsible for setting boundaries for staff by telling 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.



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!



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/>



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.



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!



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.



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 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.