

CHAIRING A LOCAL PARTY UNIT

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I. Getting Started

- A. What you should read first: Governing documents
 - 1. State DFL Constitution & Bylaws (www.dfl.org: Click “About the DFL” / “Party Documents”)
 - 2. Official Call (www.dfl.org: Click “About the DFL” / “Party Documents”)
 - 3. Congressional-district constitution
 - 4. Party-unit constitution
 - 5. Affirmative-action plan
 - 6. *Handbook for Political Party Units*
(www.cfboard.state.mn.us/campfin/partyunit.pdf)
- B. Your first calls: Key relationships
 - 1. Your unit’s other officers
 - 2. Your unit’s delegates to higher-level units
 - 3. Elected officials
 - 4. Higher-level unit’s chair and other officers
 - 5. Lower-level units’ chairs and other officers
 - 6. State office
 - 7. Campaign Finance & Public Disclosure Board
(www.cfboard.state.mn.us)
 - 8. Your unit’s banker: update signatures

II. The Basics

- A. The party unit's purposes
1. To recruit (if necessary), endorse, and help elect candidates for public office in the unit's jurisdiction
 - a) To help elect endorsed candidates at every level within and beyond the unit
 2. To further the Party's goals and purposes, and thereby to serve the community
 3. To represent the unit in the Party organization
 - a) To represent the Party to its members in the unit
 - b) To support lower-level party units in playing their roles
 - c) To keep and activate the Party's volunteers, and especially to welcome new volunteers
 4. To help shape the policies and priorities that affect the unit and the Party
 5. To create—
 - a) a deliberative forum for the exchange and expression of its members' views, and
 - b) a voice to advocate those views
- B. The chair's duties
1. Chair the central and executive committees. Call meetings as necessary.
 2. Subject to review, enforce and interpret the constitution and implement each bylaw, resolution, rule, policy, and procedure that supplements the constitution.

3. Manage each officer, delegate, board, commission, committee, and any other agent whose management is not otherwise assigned.
4. Undertake or delegate any responsibility not otherwise assigned.
5. Generally represent the party unit and speak on its behalf (while distinguishing between personal remarks and remarks made officially, and taking care that any mention of your title in connection with your personal remarks is for identification only).
6. Represent the party unit on higher-level central and executive committees.
7. Support and guide volunteers.
8. Recruit, welcome, educate, and involve new members.

III. **Running an Effective Meeting**

- A. Planning an effective meeting
 - 1. Coordinate with the other officers and leaders
 - 2. For each resolution that can be anticipated, check:
 - a) Have any formal requirements (previous notice, publication, committee approval) been satisfied?
 - b) Is the resolution clear and specific? Will the members understand what they are considering?
 - c) Has the matter been considered by each interested officer and committee?
 - d) Has any opposing viewpoint been fairly considered?
 - e) Who will make the motion? Will he or she be there? Does he or she understand the motion and his or her role in proposing it?
 - 3. Script out an agenda
 - a) Is someone responsible for each item?
 - b) Is the order logical? Are the most important or interesting matters strategically placed at the beginning or end?
 - 4. Minimize the preliminary business
 - a) Call the meeting to order promptly
 - b) Reach the action calendar — a resolution on which a vote is expected, or another matter that may warrant significant debate — within 15 minutes after the call to order
 - c) Schedule reports after (or in between) the action calendar

5. Avoid wasting time
 - a) Circulate the agenda in advance, including any anticipated resolution
 - b) Set the pace with the first item
 - c) Limit reports
 - (1) Circulate each report in writing with the agenda, if possible
 - (2) Allow an oral report only if necessary
 - (3) Any oral report ought to *briefly* notify the assembly that an issue is under consideration and to invite participation in that process, but the consideration of the issue itself belongs in committee
 - d) Adjourn promptly
 - (1) Set a customary limit (ordinarily about an hour) and keep it
 - (2) Let the agenda note if the meeting may run later
6. Manage your docket
 - a) Actively monitor and manage a docket that consists of each resolution and other matter that awaits consideration
 - b) Schedule one or two significant matters per meeting
 - c) Let a matter reach the floor only after a committee has studied the details, framed the issue at the conceptual level, and reported a written resolution
 - d) Report the state of the docket, including matters for consideration at future meetings

7. Possible agenda topics
 - a) a roundtable for lower-level unit chairs as a forum for the exchange and expression of their views about their role and how your unit can best help them fulfill that role
 - b) a report from the delegation to any higher-level unit, including—
 - (1) the time and place of any upcoming endorsing convention
 - (2) the time and place of the next meeting, if known, together with any notice of intent to elect or of other business that appeared in the meeting's call or notice
 - (3) any other business of interest to your party unit
 - c) hearing from elected officials who were elected with the unit's endorsement so that those officials and the unit's leaders are as familiar as possible with each other's views
 - d) hearing from candidates for the Party's endorsement in any electoral jurisdiction that falls wholly or partly within the unit, or for Party office in any jurisdiction within which the unit wholly or partly falls, so that your delegates are as fully informed as possible when voting on those candidates

B. Impartiality vs. leadership

1. The ethical tension
2. Impartiality in the meeting trumps leadership outside the meeting
3. Motions from the chair: a practical problem and three solutions
 - a) Requesting unanimous consent: "Any objection?"

- b) “Entertaining” motions
- c) Designated mover
- d) A fourth solution: small boards and committees

C. Leading impartially

- 1. Deal with people, not rules
- 2. Demystify the rules (without denying them)
- 3. Make the members comfortable
- 4. A motion is (almost) never just “out of order”

D. A chair’s primary duty: let the majority figure out what it wants to do (especially when it doesn’t know)

- 1. Elicit relevant information
- 2. Elicit both sides, balance the debate
- 3. Recognize when a consensus forms
 - a) Anyone who has not made up his or her mind?
 - b) Anything that anyone can say that may change someone’s mind?
 - c) If not, then close debate.
- 4. Keep an open mind yourself

IV. **Building Relationships**

A. Your unit's other officers

1. Associate Chair

- a) advise and assist the chair however possible
- b) act as chair whenever the incumbent is absent or under a disability
- c) represent the party unit on higher-level central and executive committees

2. Secretary

- a) serve as secretary to each governing body, whose proceedings he or she carefully and faithfully records
- b) keep and organize all necessary correspondence and other records (other than financial records)
- c) represent the unit as an alternate to higher-level central and executive committees

3. Treasurer

- a) prudently deposit (or, if authorized, invest) and safeguard the unit's funds and otherwise manage its finances
- b) monitor compliance with any applicable law relating to such finances, and file any required report (see *Handbook for Political Party Units*, www.cfboard.state.mn.us/campfin/partyunit.pdf)
- c) disburse money as authorized
- d) report to each meeting of each governing body on the state of the treasury
- e) represent the unit as an alternate to higher-level central and executive committees

- f) work with the committee that oversees the budget and finances
- 4. Affirmative Action Officer
 - a) draft, implement, report on, and recommend any necessary amendment to, the affirmative action plan
 - b) monitor compliance with the Party's policies relating to affirmative action, and recommend a remedy for any noncompliance
 - c) represent the unit on the higher-level affirmative-action commission
 - d) represent the unit as an alternate to higher-level central and executive committees
- 5. Directors
 - a) with portfolio
 - b) without portfolio
 - c) directors as coordinators with lower-level units, for which the director will—
 - (1) regularly communicate with the unit chair and other officers
 - (2) serve as a liaison between your unit and the lower-level unit
 - (3) encourage the lower-level unit's regular representation in your unit's central committee
 - (4) call any concern or other business from the lower-level unit to the attention of the relevant officer or committee
- B. Delegates
- C. Elected officials

- D. Higher-level unit's chair and other officers
- E. Lower-level units' chairs and other officers
- F. State office
 - 1. Party Affairs Director: David Weinlick (e/m dweinlick@dfi.org, ph. 651.251.6304)
- G. Other key relationships
 - 1. Delegates and volunteers
 - 2. Media
 - 3. Campaign Finance & Public Disclosure Board (www.cfboard.state.mn.us)
 - 4. Bank
- H. One other (less-important) relationship: your opposite number

V. Fundraising and Other Resources

A. Fundraising

1. Political Contribution Refund program

- a) Minnesota Statutes § 290.06, subd. 23: “A taxpayer may claim a refund equal to the amount of the taxpayer’s contributions made in the calendar year to candidates and to a political party. The maximum refund for an individual must not exceed \$50 and for a married couple, filing jointly, must not exceed \$100. A refund of a contribution is allowed only if the taxpayer files a form required by the commissioner and attaches to the form a copy of an official refund receipt form issued by the candidate or party and signed by the candidate, the treasurer of the candidate’s principal campaign committee, or the chair or treasurer of the party unit, after the contribution was received. . . .”

2. Signature events, local traditions

3. Mailings

4. Phone banks

5. Key donors

6. John Mutz & Katherine Murray, *Fundraising for Dummies* (2000)

B. Other resources