

THE MINNESOTA DFL PARTY

# OFFICERS GUIDEBOOK



*Information and Resources for Local DFL Leaders*





To all local unit officers:

Thank you for taking on this vital role! The strength of our Party depends on grassroots leaders like you who dedicate time and energy to spreading the DFL message, providing needed support to our candidates and their campaigns, and building the infrastructure that all these efforts require. Our mantra here at the DFL is “Build to Win – Build to Last!” and you are a critical part of building a strong DFL now and in preparation for the future.

One of our chief goals is to help all local unit officers feel confident in their roles, so they can be effective leaders from the outset. This guidebook provides information to serve as a tool to instruct all officers on what they should be doing and provide guidance on recommended practices. It would be difficult to include every detail in this booklet, so we have provided references to other source materials where necessary.

I hope the information you find here is helpful. Please let us know if there is something you would like to see added in future editions. As I frequently say, the sign that once hung in Governor Rudy Perpich’s office had it right: “None of us are as smart as all of us.”

All my best,

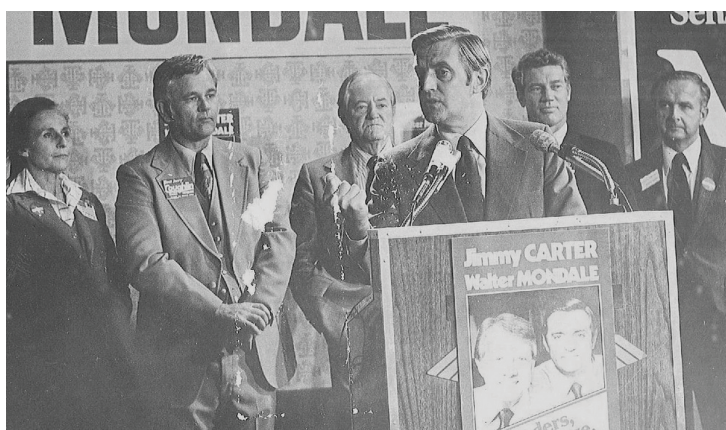
A handwritten signature in blue ink, appearing to read "Ken Martin".

Ken Martin  
Minnesota DFL Party Chairman

## Table of Contents

ABOUT OUR DFL PARTY	2
OFFICER DUTIES & RECOMMENDED PRACTICES	6
ORGANIZATION & MEETINGS	10
OUTREACH & INCLUSION	12
FUNDRAISING & BUDGET	13
COMMUNICATIONS	15
VOTER FILE, VOTEBuilder, VAN	16
CAUCUSES & CONVENTIONS	17
CAMPAIGNS & CANDIDATES	21
TRAINING	22
PRESCRIPTION FOR A HEALTHY PARTY UNIT	23

## About Our DFL Party



## A Brief DFL History

The Democratic Party began functioning in Minnesota as early as 1849, during territorial days. The Minnesota Democratic-Farmer-Labor Party, a fusion of Democratic and Farmer-Labor parties, is rooted in the tradition of Thomas Jefferson. The Farmer-Labor Party was the fruit of political organizations that were great movements of protest and dissent in the Midwest. As former Governor Karl Rolvaag once said: “Born in adversity, from these movements, the Democratic-Farmer-Labor Party has received the tradition of daring to strike against conformity when such action becomes a necessity in a changing world pattern.”

The Farmer-Labor Party, which was formed in Minnesota prior to the 1922 elections, reached its pinnacle of success and the beginning of its brief golden era with the election of Floyd B. Olson as governor in 1930. Olson developed programs in the state to work with the New Deal to alleviate the distress of Minnesotans during the Great Depression years. He became a national figure, whose untimely death from cancer cut his career short in 1936.

Following Olson’s death, the Farmer-Labor Party struggled with internal confusion and disorganization, resulting in its 1938 defeat by a staggering margin – representing a reversal of more than a half-million votes. The Republican Party enjoyed a virtual monopoly in both state and congressional offices during the period of 1938 to 1944. Liberal political activity in the state further deteriorated, as Farmer-Labor supporters fought with each other for party control and Democrats enjoyed some of the benefits of national patronage.

By 1944, the state’s liberals and progressives had come to believe the road to political success lay with the united efforts of the Democrats and the Farmer-Laborites. Hubert H. Humphrey, who had been mayor of Minneapolis, was generally accepted as the leader and spokesperson for the liberal movement in Minnesota. With the blessings of President Franklin D. Roosevelt and the Democratic National Committee, Humphrey directed the merger of the two parties with persistence and hard work, over the objections of some in both camps, to form the Minnesota Democratic-Farmer-Labor Party on April 15, 1944. Just four years later, Humphrey was elected U.S. Senator along with four new DFL members of Congress, and the Party stood at last on firm ground.

## Party Documents

These documents can all be downloaded at [dfl.org/partydocuments](https://dfl.org/partydocuments)

### Constitution, Rules and Bylaws

The DFL Constitution, Rules and Bylaws is the highest governing document of the party. This document also contains the rulebook, bylaws and the code of conduct. Changes to the Constitution are voted on at the State Convention.

### Official Call

The Official Call is the “how-to guide” for DFL Party functions. Here you will find information on Precinct Caucuses, Voting Procedures, Platform resolutions and much more.

### Party Platform

The DFL Party Platform outlines the beliefs and principles of the Minnesota DFL Party. Platform resolutions are voted on at Precinct Caucuses. Resolutions that pass OU conventions go to the State Platform Committee and are consolidated for consideration at the State Convention. Each of these items has received at least a 60% affirmative vote at a DFL State Convention.

### Action Agenda

The DFL Action Agenda states our party’s policy priorities. Attendees at DFL precinct caucuses build the Action Agenda by introducing resolutions at the biennial precinct caucuses. Each Action Agenda item has received a minimum 60% affirmative vote at a DFL State Convention. The State Convention may approve up to 100 items to include in the Action Agenda. If more than 100 items receive the required 60% approval, the 100 items that received the most votes are included in the Action Agenda.

## Party Organization

The Minnesota Democratic-Farmer-Labor Party is the Minnesota branch of the Democratic National Committee. The Minnesota DFL is divided into four levels: Precincts, Organizing Units, Congressional Districts, and the State Party.

### Precinct

The voting precinct is the base unit in the DFL structure. In even-numbered years, Organizing Units hold Precinct Caucuses to elect leadership in each of their precincts, to pass resolutions that may change the DFL Party Platform, and to elect delegates and alternates to their convention. The state party will create a web page that includes all resources necessary to planning and running Precinct Caucuses.

### Organizing Unit

Every Precinct falls within an organizing unit (OU), the second level of the DFL party structure. The boundaries of an organizing unit may be based on counties, senate districts, or house districts. Organizing units are formed according to criteria outlined in Article V of the DFL Constitution and Bylaws.

### Governing Bodies

Organizing Unit Conventions are the governing body of the unit. Organizing units hold conventions in even-numbered years. The purpose of these conventions is to elect organizing unit officers, pass resolutions, adopt an organizing unit constitution, elect delegates and alternates to higher-level conventions, and, if necessary, endorse legislative candidates. It is a

good idea to include odd-year business conferences to your OU’s constitution to avoid electing new leadership during an election year. Between conventions, the governing body of the unit is its Central Committee. The central committee is composed of its officers, directors, precinct chairs, and congressional district central committee members that reside within the unit. Between central committee meetings, the executive committee, which includes the unit’s officers (chair, vice chair, secretary, treasurer, outreach officer, and directors) is the governing body of the unit.

### Congressional District

DFL Congressional District Units are the third level of the party structure. Congressional District officers consist of a chair, vice chair, secretary, treasurer, outreach officer, and directors. The primary responsibility of congressional district units is to coordinate the organizing units contained within its boundaries, and to support endorsed candidates for United States House of Representatives.

### Governing Bodies

Congressional District units are governed by a Convention held in even-numbered years. It is a good idea to include odd-year business conferences in your unit’s constitution to avoid electing new leadership in an election year. Congressional District Conventions elect the congressional unit party officers, endorse a candidate for the U.S. House of Representatives; and, in presidential election years, nominate a Presidential Elector and Alternate, and elect Delegates to the Democratic National Convention. Between Conventions, the Congressional District governing bodies are its Central and Executive Committees. The Central Committee is composed of the Congressional District



## About Our DFL Party

officers, Organizing Unit Chairs and Vice Chair residing within the Congressional District, members of the State Central Committee or State Executive Committee who reside within the Congressional District, and other persons that the congressional district constitution may include. Its Executive Committee consists of the Congressional District officers, members of the State Executive Committee who reside within the district.

### State

The State DFL Party is the top level of the DFL party organization. The state party officers shall be the chair, two vice chairs, outreach officer, secretary, treasurer, national committee members, two state directors elected from each congressional district, and the finance chair.

### Headquarters

The Minnesota DFL has an office staffed full-time by professionals in finance, communications, party affairs, training, organizing, and data who assist DFL members at all levels. The state office is located at 255 E. Plato Boulevard in St. Paul, Minnesota 55107.

### Governing Bodies

In even-numbered years, 1200 Delegates elected at Organizing Unit Conventions join Distinguished Party Leaders and Delegates-at-Large, at the DFL State Convention. These Delegates elect state Directors; discuss and adopt a state party Platform; endorse candidates for statewide public elected office; vote on the DFL Party Constitution and Bylaws; and, in presidential election years, elect Delegates and Alternates to the Democratic National Convention and Presidential Electors. Between Conventions, the State DFL Party's governing bodies are the State Central and State Executive Committees. In odd-numbered years, State Central Committee members elect State Party officers: Chair, Vice Chair, Secretary, Treasurer and Outreach Officer at the Business Conference. The State Central Committee is comprised of the Organizing Unit representatives; Delegates-at-Large; the Chair and Vice Chair of greater and rural Minnesota Senate Districts; the Chairs of Anoka, Ramsey, Scott and Sherburne counties; elected officials elected at the Electeds Convocation; former state party Chairs and Vice Chairs; the MYDFL Vice President and the members of the State Executive Committee. Additionally, any members of State Standing Committees that were not elected to the State Central Committee, may serve as non-voting Delegates to the State Central Committee. The State Central Committee meets three to four times a year, while the State Executive Committee generally meets six times. The Executive Committee consists of the state party officers, the chair and vice chair of each congressional district, three voting directors elected by DFL elected officials, the president of the MYDFL, and voting directors elected by each of the other Community Caucuses.

## National Democratic Party

The DFL Party is subordinate to the **National Democratic Party**. Every four years, the National Democratic Party holds a Convention to select its Presidential and Vice Presidential candidates. Minnesota elects pledged Delegates to the National Convention at Congressional District and State Conventions. The delegation also includes unpledged Delegates: the State DFL Chair and Vice Chair, DNC members, current Senators and members of Congress, and other officeholders and Party leaders.

### Governing Body

Between National Democratic Party Conventions, the governing body is the Democratic National Committee (DNC). Minnesota is represented on the DNC by the state party Chair and Vice Chair and four at-large DNC representatives elected at the State Convention. The address of the Democratic National Committee office is **430 South Capitol Street, S.E., Washington, DC 20003; phone: 202-863-8000.**

## Other Electoral Jurisdictions

### City DFL Party Organizations

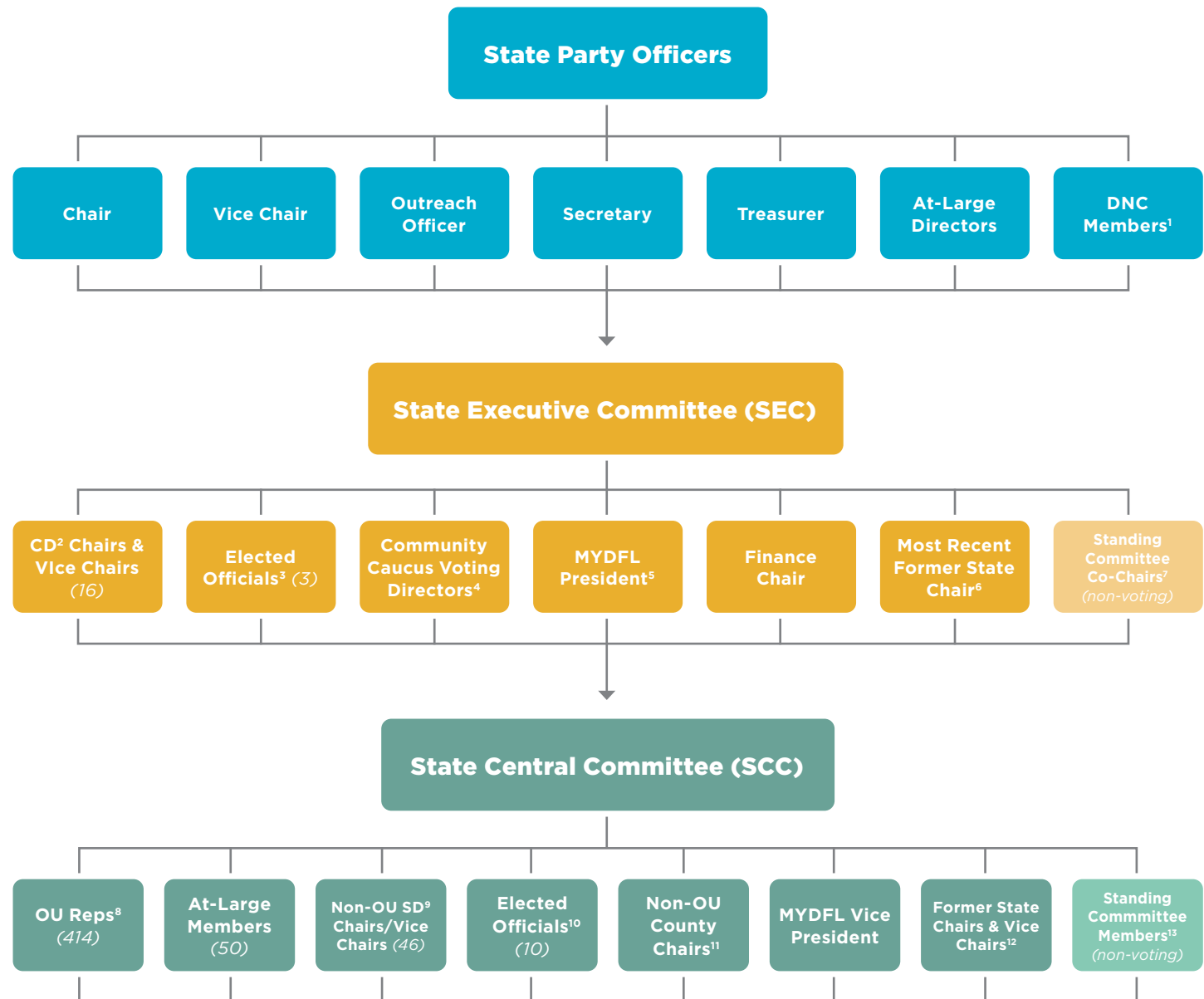
The DFL Constitution and Bylaws (Article IX) allows city DFL Party organizations to be formed if authorization is given by the Central Committee having the smallest jurisdiction which includes the city seeking such an organization. For example, the Fifth Congressional District authorizes the Minneapolis DFL, whereas the Winona County DFL would authorize a Winona City DFL. That Central Committee may also authorize the adoption of a constitution by the city organization. Several cities have been given that authorization: Brooklyn Center, Brooklyn Park, Duluth, Maplewood, Minneapolis, Roseville, and Saint Paul. These city DFL bodies have elected officers, adopted constitutions and conduct business, including endorsements for city-wide public office.

### County DFL Party Organizations

The DFL Constitution and Bylaws (Article IX) also allows county DFL Party organizations. For a county organization to be formed, authorization must be given by the Central Committee having the smallest jurisdiction that includes the county seeking such an organization. For example, the Fourth Congressional District authorizes the Ramsey County DFL. That Central Committee may also authorize the adoption of a constitution by the county organizations. Counties that have been given that authorization include Anoka, Ramsey, Scott, and Sherburne. These county DFL bodies have elected officers, adopted constitutions and conduct business, including endorsements for county-wide public office.

## DFL Party Organizational Chart

The membership of the State Executive Committee (SEC) is detailed in Article VII, Section 5 of the DFL Constitution and Bylaws. The membership of the State Central Committee (SCC) is detailed in Article VII, Section 4. All State Party Officers are members of the SEC. All members of the SEC are members of the SCC.



1. Democratic National Committee (DNC) Members not elected at the State Convention or SCC are non-voting.

2. Congressional District (CD)

3. Elected officials elect three voting Directors to the SEC at the Convocation.

4. Only authorized Community Caucuses that have completed and filed a biennial report with the State Party Affairs Committee may elect a Director to the SEC.

5. MYDFL is the Minnesota Young DFL, a DFL Community Caucus.

6. The most recent State Chair shall be a voting member of the SEC if the Chair was not removed from office, participated in the most recent Precinct Caucuses and accepts the position.

7. Standing Committee Co-Chairs are non-voting. These committees include but are not limited to: Outreach and Inclusion; Constitution, Bylaws and Rules; Platform, Issues and

Legislative Affairs; Party Affairs and Coordinated Campaign

8. There are 121 Organizing Units (OUs), comprised of either full senate districts, full counties, full house districts, or one or more partial counties and/or legislative districts. Refer to Article V of the DFL Constitution and Bylaws for a complete list of Organizing Units.

9. Senate District (SD)

10. Elected officials elect ten Delegates to the SCC at the Convocation.

11. County-wide DFL units include but are not limited to: Anoka, Ramsey, Scott, and Sherburne.

12. Each former State Party Chair or Vice Chair shall be an ex-officio voting member of the SCC, assuming they were not removed from office, participated in the most recent Precinct Caucuses and accept the position.

13. All State Party Standing Committee members shall be non-voting members of the SCC.

# Officer Duties & Recommended Practices

*Candidates for public office, whether statewide, congressional or legislative, will often say that the most important unit in the state party is the Organizing Unit. A good Organizing Unit that provides financial and volunteer assistance can mean the difference between winning and losing. A DFL-endorsed candidate's campaign will usually rely heavily on the Organizing Unit for help in fundraising, literature drops and door knocking, event planning, information gathering and communications.*

## Organizing Unit Chair

The Chair leads the Organizing Unit and must have the ability to organize, provide direction, and work well with others. The Chair assigns and monitors progress on tasks as needed. The Chair should consult with other officers about all decisions, particularly involving expenditures and other matters that may require a vote of the Organizing Unit Central Committee.

### General Responsibilities

- Call and lead Central and Executive Committee meetings.
- Attend state and congressional district Central Committee meetings and other committees on which they serve.
- Represent the party unit on higher-level Central and Executive Committees.
- Call, organize, and convene Organizing Unit Conventions.
- Outside the unit, represent and speak on the party unit's behalf, without inserting personal remarks or biases.
- Manage the activities of other unit officers.
- Delegate tasks as needed to other members of the party unit.
- Support and guide volunteers.
- Recruit, welcome, educate and involve new members.
- Recruit conveners for each Precinct Caucus.
- Lead development of a strategic plan for unit activities.
- Send password requests to Voter File Manager for anyone in the Organizing Unit needing Voter File access.

### First Duties After Being Elected

- Welcome other new officers, Directors, State Central Committee members/Alternates, and precinct officers promptly and personally.
- Stage an orientation event or training session for precinct officers as soon as possible.
- Propose schedule for unit's committee meetings.
- Notify Minnesota Campaign Finance and Public Disclosure Board of new officers.
- Change signatories on unit bank account.
- Obtain records and relevant materials from previous officers.

## Conducting a Successful Meeting

- Prepare in advance: create an agenda and discussion topics.
- Distribute agenda and discussion topics to committee members two weeks before scheduled meeting.
- Always be in control of the meeting.
- Follow the agenda closely and move the meeting along quickly without discouraging meaningful discussion.
- Plan ahead for appointments and delegation of specific tasks.
- Consider inviting a guest speaker to the meeting. Many DFL legislative leaders, elected officials, and potential candidates would be willing to speak. Other potential speakers are experts on issues and other pertinent topics of local interest.
- Ask someone to make a motion when needed.

### Recommended Practices

- Ensure that someone, ideally a Precinct Chair, is responsible for every precinct.
- Appoint committees to carry out unit activities, for example: Finance and Fundraising, Communications-including website and social media, Data Management, Issues or Research, Community Service, Programs and Events, Speaker's Bureau, County Fair, Precinct Organization, Campaign Coordination, Candidate Recruitment, and Get-Out-The-Vote (GOTV).
- Meet with party unit committees.
- Ensure each committee has sufficient members.
- Consult with members on their duties, plans and progress.
- Coordinate committee activities with other unit activities.
- Ensure committees meet and report to the party unit regularly.
- Arrange regular party unit meetings.
- Give precinct officers and party members training and information on programs, campaigns and issues.
- Coordinate efforts and information between the local party unit, congressional district and state DFL party organizations.
- Develop a budget and fundraising timetable so the party unit and campaigns are properly financed.
- Recruit and encourage potential candidates for state legislature, county offices, city or township offices, and school board.
- Become familiar with DFL party documents, especially: **Constitution and Bylaws – Article III: General Rules and**

## Policy; Constitution and Bylaws – Article V: Organizing Units; and the Official Call – General Rules for All Meetings.

### Outgoing Chair Duties

- Transfer unit materials, records, and equipment to new Chair.
- Assist in changing bank account signatories.
- Notify vendors as needed of name changes.
- Continue service in unit as authorized.
- Supplementary Information:

**Political Party Unit Handbook** – [cfboard.state.mn.us](http://cfboard.state.mn.us)  
**DFL Party Documents** – [dfl.org/partydocuments](http://dfl.org/partydocuments)

### Supplementary Information

*Parliamentary Procedure At A Glance:* [dfl.org/resources/](http://dfl.org/resources/)  
*Political Party Unit Handbook:* [cfboard.state.mn.us](http://cfboard.state.mn.us)/  
*DFL Constitution and Bylaws, Official Call, Ongoing Platform and Action Agenda:* [dfl.org/about-our-party/dfl-party-documents/](http://dfl.org/about-our-party/dfl-party-documents/)

## Organizing Unit Vice Chair

The Vice Chair works with the Chair, giving advice and sharing information to make both roles easier and more successful.

### General Responsibilities

- Keep up-to-date on the various local party unit's activities.
- Serve as Outreach and Inclusion Officer if unit does not provide for a separate one.
- Assist the Chair as desired by the Chair.
- Represent the unit at state and congressional district Central Committees as authorized.
- Take extra initiative for specific projects as needed.
- Be prepared to assume the duties of the Chair if needed.
- Succeed the Chair in case of vacancy.
- Fill in for other officers as needed; for example, take minutes in absence of Secretary.

### First Duties After Being Elected (along with Chair):

- Welcome new local officers, Directors, State Central Committee members and Alternates promptly and personally.
- Stage an orientation event or training session for precinct officers as soon as possible.
- Send password requests to Voter File Manager for anyone in the Organizing Unit needing Voter File access.
- Obtain records and relevant materials from previous officers.

### Outgoing Vice Chair Duties

- Assist the Chair in the transfer of powers and materials.



## Outreach and Inclusion Officer\*

The local party unit Outreach and Inclusion Officer ensures all constituents are treated equally, based on the Minnesota DFL principles of inclusion. The Outreach and Inclusion Officer leads the local unit's efforts toward inclusive political participation, and strives to achieve diversity in perspective and representation. The Outreach and Inclusion Officer is responsible for developing and implementing the unit's outreach and inclusion plan to establish relationships with underrepresented communities and new potential leaders within the unit's boundaries.

### General Responsibilities

- Draft, implement, report on, and recommend any necessary amendments to the outreach and inclusion plan.
- Monitor compliance with Party outreach and inclusion policies, and recommend a remedy for any noncompliance.
- Represent the unit on its Congressional District's Outreach and Inclusion committee.
- Ensure the Affirmative Action, Inclusion, and Outreach statement or reminder, as appropriate, is read before any election; unit meeting or event dates do not conflict with religious or community observances; and food served at events does not conflict with religious or cultural preferences and restrictions.

### Accommodations at Meetings and Events

- Ensure that all meetings and events are held in accessible locations with adequate handicap parking spaces.
- Arrange for interpreters as needed.
- Ensure documents are available in all relevant languages.



# Officer Duties & Recommended Practices

## Outreach to Underrepresented Communities

- Connect with people at community meetings and events to learn what issues and interests bring them together.
- Listen to understand the issues that are important to them.
- Establish relationships and provide information on how the unit can help them achieve their goals.
- Recruit individuals who may want to get involved and inform them about voter registration, Caucuses, Conventions, campaigns, and other unit meetings, events and activities.

## Outgoing Outreach Officers should:

- Share relevant contacts with their successor.
- Share schedule of any community events with successor

## Supplementary Information

ADA Toolkit: [dfl.org/resources/](http://dfl.org/resources/)

Interfaith Calendar: [interfaith-calendar.org](http://interfaith-calendar.org)

*\*Note: If a local party unit does not elect an Outreach and Inclusion Officer, the Vice Chair has responsibility for these duties.*

## Organizing Unit Secretary

The Secretary is the party unit's recorder and record-keeper.

### General Responsibilities

- Maintain rosters of unit Central Committee, Executive Committee and State/Congressional District Central Committee members/Alternates.
- Distribute meeting notices, agendas, and minutes of the previous meeting.
- Record minutes of each unit Central and Executive Committee meeting, including reports presented at those meetings.
- Record attendance and excused absences of every meeting
- Notify the DFL Party Affairs Director of any changes to the unit's officers or State Central Committee membership.
- Send the state DFL office a copy of a revised Constitution and Bylaws as they occur.
- Assist in updating contact information, activist codes, and other pertinent information in the Voter File (VAN).
- Maintain and provide a permanent record of unit activities.
- Maintain event/meeting dates on website and submit to the state DFL calendar.
- Assist with maintaining unit website and social media.
- Conduct unit correspondence.
- Contact media and post public notices of Precinct Caucuses and other party unit activities.

- Submit a list of individuals interested in serving as election judges to the county auditor or city clerk, as well as the DFL Voter File Manager.

### First Duties After Being Elected

- Create a complete roster of Central Committee, Executive Committee, and State Central Committee members/Alternates and submit to state DFL office.
- Create a complete roster of precinct officers
- Distribute the schedule for unit Central Committee and Executive Committee meetings
- Obtain records and relevant materials from previous Secretary

### Outgoing Secretary Duties

- Transfer electronic and physical records to new Secretary.

## Organizing Unit Treasurer

The Treasurer is, according to state law, the legal representative of the local party unit. The Treasurer is responsible to keep strict financial records of contributions and expenditures and to submit those records in the required format to the Minnesota Campaign Finance and Public Disclosure Board. The best listing of the Treasurer's duties is found in the Political Party Unit Handbook (see below), compiled by the Minnesota Campaign Finance and Public Disclosure Board. This document is the Treasurer's 'bible' and should be read by all DFL party officers.

### General Responsibilities

- Deposit prudently and safeguard the local party unit's funds and otherwise manage its finances.
- Disburse unit funds only with authority or ratification by the Executive Committee or Chair of the local party unit, according to its Constitution and Bylaws.
- Reconcile cash on hand with receipts and spending records.
- Prepare and submit timely reports to the Minnesota Campaign Finance and Public Disclosure Board according to its rules.
- Report to each Central and Executive Committee meeting on the state of the treasury.
- Work with unit committees that oversee budget and finances.
- Become familiar with the Minnesota Campaign Finance and Public Disclosure Board handbook and training materials.

### First Duties After Being Elected

- Change the signatories on the unit's bank account, accompanied by the Chair as needed.
- Submit an updated registration form to the Minnesota Campaign Finance and Public Disclosure Board if the Chair or Treasurer is new.

### Outgoing Treasurer Duties

- Transfer financial records to new Treasurer.
- Assist in changing bank account signatories.
- Notify vendors as needed of name changes.

### Supplementary Information

*The Political Party Unit Handbook, Campaign Finance Reporter Software and User Guide are available on the Minnesota Campaign Finance Board website: [cfboard.state.mn.us](http://cfboard.state.mn.us)*

### Organizing Unit Director

Organizing unit Directors are members of the unit's Executive and Central Committees. Many units specify in their constitutions which responsibilities are assigned to each Director. Examples are: Fundraising Director, Communications and Social Media Director, Voter Registration Director, Issues and Program Director, Volunteer Director, etc. Those units that do not assign duties by constitution, typically select Directors to lead specific projects under the guidance of the unit Chair or Central Committee.

### State Central Committee Delegates and Alternates

The State Central Committee Delegate represents the Organizing Unit on the DFL State Central Committee. The State Central Committee is the governing body of the DFL Party between Conventions. State Central Committee Delegates and Alternates are also representatives to their respective congressional district Central Committee. The membership of the State Central Committee is detailed in the Official Call.

### Precinct Chair and Vice Chairs

The Precinct Chair is charged with organizing the DFL Party in the voting precinct and serves on the Organizing Unit Central Committee. The Chair and Precinct Vice Chairs assist with contacting local DFL voters, recruiting volunteers and supporting campaign activities, including:

- Communicating with Precinct Caucus participants about DFL activities and events during the two-year cycle.
- Canvassing precinct residents to identify and keep record of likely DFL voters.
- Identifying DFL voters in the precinct who are willing to work on campaigns or have campaign lawn signs on their property.
- Facilitating voter-registration efforts in the precinct.
- Distributing the DFL sample ballot and campaign literature for endorsed candidates.
- Assisting with get-out-the-vote efforts at election time.



# Organization & Meetings

*Winning elections and building a successful DFL party unit organization requires planning and outlining the action steps necessary to implement the plan. Those steps cannot be limited to the election year. As soon as one election is concluded, preparing for the next election begins. It's time to get organized and get moving!*

## Developing a Unit Plan

Gather the Organizing Unit Central Committee and other interested people together to make a list of what the unit is striving to achieve. Some goals of a DFL Organizing Unit are to:

- Influence voters year-round
- Raise funds to build the party and assist endorsed candidates
- Offer issues-based programs to voters in the district
- Recruit well-qualified candidates
- Expand participation in unit activities
- Host social events and activities to build party unity and attract new people
- Update and maintain Voter File data
- Increase turn-out at Caucuses
- Raise DFL visibility in the district
- Have a strong presence at the county fair and in a local parade
- Register new voters
- Encourage early voting
- Establish more lawn sign locations
- *And more...*

The next step is to break down each goal into specific tasks, budget, timeline, etc. Form committees to manage overall projects and assign specific tasks and timelines to each committee member. Keep tabs on progress and require committees to provide regular reports. An overall plan, with a detailed timeline, is the basis for developing a unit budget and fundraising strategy. When donors know what specific activities are planned and what they will cost, they are more likely to provide support.

## Organizing Volunteers

Some basic principles of leadership:

- Talking face-to-face is the most effective way to communicate.
- Effectiveness depends on group decisions and reinforcement.
- People have reasons for what they do, or fail to do. These reasons must be understood before it's possible to lead effectively.
- Personal interest makes a big difference to people. They like logic and efficiency, too, but their loyalty goes to leaders who understand their needs, problems and accomplishments.

- Effective groups don't just grow and persist, they must be carefully maintained. Good group work requires organization: keeping records; making clear assignments; holding regular meetings; and periodically reviewing the results.

## Recruiting

How to get people to do a job:

- Ask them. Don't wait for someone to volunteer. People want to be noticed and appreciated, even if it's just for showing up.
- People will respond to a friend, neighbor, co-worker, or a person with standing in the community (such as an elected official). But, it's the act of asking that is important.
- Once recruited, a volunteer should be welcomed by the leader of the group. This effectively seals the deal: first being asked by someone they know and respect and, second, being welcomed by the person in charge of the activity.

## Making Assignments

Where to start:

- Let each person know their help is needed. If a person hears the group is just "looking for people," the message is that they are easily replaceable and not responsible for doing a job well.
- Explain how each person's job fits with the goals of the DFL. People want to understand things they are part of and they work best when they know others are depending on them.
- Clarify the task and that it has a definite beginning and end. People are often reluctant to sign up for an open-ended assignment, fearing they might over-commit.
- Assign people to jobs they can do well at the outset. They will be more willing to take on things they are confident in doing. Later, when they are established in the group, they might be more willing to try new things.
- Encourage questions and discussion before work begins.
- Be enthusiastic about the importance of the work, rather than apologize or belittle the task. Conveying a positive attitude to the group keeps people motivated.



## Tips for Leading Effective Meetings

### The Basics

- Establish a schedule and location for regular meetings that people can easily remember, such as: Second Tuesdays, 6pm, at the Community Center, Room 1.
- Send official notices by email, postcard, or both, for every meeting, at least 10 days in advance to a broad group of strong Democrats (reminding them all are welcome!). Include an agenda, guest speakers, and other upcoming activities - as well as where the after-meeting get-together will be (see below).

### Make It Fun

- Invite special guest speakers from the DFL, the community, local colleges, etc., and promote the topic in advance. For example, give them 10-15 minutes at the start of the meeting to speak and answer questions.
- Give every attendee 1-2 minutes to introduce themselves and respond to a “question of the day.” For example: “What makes you a DFLer?” or “How long have you lived in this district?” or “What’s your favorite side dish at a barbecue?”
- Plan a regular after-meeting get-together at a local restaurant or popular spot. Include an invitation in the meeting notice for everyone to attend, even if they can’t make the meeting itself. This is where friendships are made, volunteers are recruited, ideas shared and politics can be enthusiastically discussed.

### Keep It Short

- Hold the work and “mechanics” to an hour or less. Encourage reports from officers and committees to be brief and to the point. For example, there is no need for the Treasurer to read through the budget report if it is printed and available to attendees.
- On the agenda, include minutes allowed for each item. If the body wishes to increase or decrease the time for any item, that can be easily decided when the agenda is up for approval.
- Manage discussion time on issues. A good practice is ask for a motion, get a second, and open it up for discussion, alternating 3 pro and 3 con - 1 minute each. Then take a vote. If more discussion is desired before the motion is considered, take a vote on that, as well, before continuing.
- Brainstorming on a project can be a good use of meeting time, but manage the time spent and consult the body for guidelines on how to proceed and determine next steps.
- Be diligent in holding guest speakers to their allotted time.
- Take some discussions off-line - outside meeting time - if someone desires deeper discussion of a matter that does not have to involve the entire body.

### Involve Attendees

- Officers should not dominate the discussion. Take steps to encourage others to offer their opinions and suggestions. Ask them what they think. People will not continue coming if they feel they can’t contribute anything.
- Be open to questions, because they often lead to better ways of doing things. Discourage the saying: “because that’s how we’ve always done it.” Nothing turns new people off quicker than resistance to change and new ideas.

### Know the Rules

- Parliamentary procedure (Robert’s Rules) are useful to ensure equal time for opposing views and fair consideration of any issue. Some meetings can proceed more informally without problems, but the Chair should be prepared to invoke parliamentary procedure when necessary. A brief summary can be found in Section 8 of this manual.
- The Minnesota DFL also has adopted rules for all meetings, including bylaws that govern specific procedures. These can be found in the DFL Rule Book, compiled by the Constitution, Bylaws and Rules Committee and approved by a vote of the State Central Committee, scheduled for 2017. In the meantime, Rules for All Meetings are available in the 2016-17 Official Call, with references to the pertinent bylaws found in the DFL Constitution and Bylaws.





## Outreach & Inclusion

*The current political climate offers an opportunity for local units to expand their ranks, recruit new activists and energize voters. Students, immigrants, people of color, displaced workers, people with disabilities, issue advocates, LGBTQ activists, and more, are seeking ways to make their voices heard. Protests, rallies, town halls, and forums, are springing up from the grassroots, and these events offer DFL leaders a chance to connect for party-building and upcoming campaigns.*

### Go Where They Are

Expecting people to find their way to the DFL on their own is expecting a lot. Emailing a meeting notice or posting an ad on Facebook is good for informing people already active in the local unit, but it won't usually attract many newcomers. To overcome this, demonstrate interest in meeting new potential Democrats on their turf. Whether it's a Stand Up Minnesota meeting, community celebration, campus rally, or concert, representatives of the local unit should attend regularly and meet people.

### Cultural Sensitivity

Respectful outreach to people of different ethnicities, cultures, races or religions requires understanding what words and actions are appropriate. When in doubt, and there is no one nearby who can provide insight, contact the DFL Outreach and Inclusion Committee for guidance.

### Listen

After introductions, talk less and listen more. Politely ask what people care about, what they are worried about, what kind of change they want to see or what kind of help they need - but, don't ask a battery of questions as though it's a survey. Show genuine interest in learning what's important to them.

### Answer Questions

Represent the local party unit and its activities - but only if people really want to know. Not everyone loves to talk politics, but they might still want reasons to support the DFL at the polls. Keep answers brief. Once again, this is the time for more listening and less talking.

### Offer to Help

If they have identified a need, see what help the local unit can offer. It is vital that an offer to help is sincere and will be followed up. Don't drop the ball. Whether it's publicizing their event, loaning some tables and chairs, or recruiting volunteers to help clean up a vacant lot, make sure it happens as promised. The result can be a trusted, mutually-beneficial relationship.

### Make Friends

Learn people's names and faces - and don't limit contact to the group leaders. Meet as many people as you can, even if it's only a simple, friendly greeting. Building friendships takes time, and success will only come with sustained effort to connect.

### Welcome New People

New people may be interested in attending a DFL event, but it may be hard for them to imagine walking in alone. In meeting notices, event postings or personal invitations, encourage people to bring a friend. Have greeters at the door and other strategic locations to welcome people and introduce them to others.

### Ask for Help

It is much easier to ask a friend for help than a total stranger, and it is easier for a new person to say yes to someone they know. If the effort to build relationships with new people is based on mutual understanding and openness, it will soon become possible to ask for their help in political activities, and get a yes. Pairing newcomers with more experienced volunteers is always best. Taking a moment to explain how the task fits into the overall plan can make stuffing envelopes, entering data into the Voter File or collating caucus materials feel important. Remember that help comes in all forms, so be open to what is offered, show respect and express gratitude.

### Apply for A DFL Outreach Grant

Local units planning a specific outreach activity are encouraged to apply for a DFL grant. Funding is limited to reimbursement of documented expenses. To receive a grant from the Outreach and Inclusion Committee, fill out an application and submit it to the DFL State Outreach Officer. After review, applicants are invited to present the proposal to the Committee. The proposal may be fully approved, partially approved, or denied. If approved, the DFL State Chair reviews the proposal. If approved by the Chair, the applicant is required to demonstrate the success of the activity in order to qualify for reimbursement of expenses. Forms are available online at [DFL.org](http://DFL.org) in the Resources section.

*Every successful organization realistically estimates its financial needs in advance and builds a plan for raising necessary funds. In the Minnesota DFL, local units should draft a plan for the two-year cycle, prepare a corresponding budget and strategy for fundraising, and start early - well before the campaign season begins.*

### The Budget

The first step is to create a plan for building an organization that is well-prepared for the upcoming campaign. A good question to ask, whenever considering what the unit will do is: “How will this help us win?”

If the answer isn’t a clear positive, rethink the plan, add some new activities, and replace “We’ve always done it this way,” with “What can we do differently?”

With a plan in place, it’s time to create a budget – not based on what funds are in the bank at the moment, but based on what is actually needed to work the plan effectively.

### Local Unit Fundraising

A local unit must actively engage in fundraising, so it can effectively organize and communicate with the voters.

It is important to “sell the vision” when asking for donations. Donors will give to the party unit when they know how the funds will be used and have confidence in the people running the organization.

When planning any fundraising activity, the unit Treasurer should contact the Campaign Finance Board in advance to be certain what rules or limitations may apply and how to report funds received. This step will protect the party unit from compliance errors that could result in fines and bad publicity. Here are some tips for fundraising:

#### Pass the Hat

At every gathering or meeting, the unit Chair or other officer should make a personal “ask” for donations, emphasizing that all activities are funded at the grassroots by the generosity of local Democrats.

Place a large plastic jug labeled “Dollars for Democrats” at the table where people sign-in and remember to drop a few bills (seed money) into the jug as a hint. Pass the jug, or other containers, around the room when the ask is made.

Remind people that the cost to rent the space, make copies, provide snacks, etc., can be covered by the “loose change in their pockets” if everyone pitches in what they can.

### Caucuses and Conventions

While there is no requirement for Caucus attendees to make a donation, having a container to collect money at sign-in, is good practice. The convener can also pass the container around the Caucus room during the meeting, asking for voluntary donations to cover expenses.

At unit Conventions, it is common practice to place a container with a sign asking for a recommended donation of \$10 or so at the registration table where Delegates and Alternates sign-in and get their credentials.

Later on, the unit Chair or other officer should make an additional ask from the podium for voluntary donations to cover costs and to allow the unit to write checks that day to its endorsed candidates.

Have volunteers circulate among attendees to collect donations and place a table near the Convention floor where the Treasurer can accept donations throughout the day.

### Events

The best strategy for local unit fundraising events is to keep the cost to a minimum and the fun at the maximum.

Attracting new people to an event is usually easier if it is held in a public location rather at a private home: hold the annual barbecue in a park or a pizza party/game night at a popular restaurant - and there is the added benefit of high visibility in the community.

To keep the expenses low for the barbecue, the unit treasury can cover costs for the main dish (hot dogs, hamburgers, chicken, etc.) and park shelter rental, while volunteers donate beverages, side dishes and desserts. For the pizza party, the unit can buy the pizzas, while guests buy their own beverages. The suggested donation should at least double the cost per person.

Units should experiment with different types of events during the year to see what works: an elegant house party for reliable donors; a banquet with silent auction, featuring a guest speaker; screening a topical film at an outdoor location; or holding a garage sale. Mix new events with tried-and-true annual events to attract new supporters and keep things interesting for everyone.

# Fundraising & Budget

## Phone Bank

Local Units should set up a virtual phone bank on VAN. Be prepared to accept credit card donations using a computer and the unit's fundraising page. For anyone who is not comfortable giving out their credit card information, have the URL handy.

## ActBlue

ActBlue is a digital platform that allows party units to fundraise electronically from individual donors. Using this platform will enable a party unit to elicit funds via a URL that can be shared through email, social media, and more.

## Direct Mail

Sending direct mail is a more expensive, possibly less effective option. A postcard can be mailed with the unit's donation page URL more cheaply than a letter, but design and printing will cost more. Direct mail should be sent selectively to recurring donors. Many party units obtain a post office box for all mailed correspondence as a safer alternative to using a person's mailing address.

## Email

A solicitation of donations by email is less expensive than direct mail and can reach a wider audience. It takes just a little time to set up and schedule an email blast with the DFL Voter File Manager, with a direct link to the party unit website's contribution page.

Think about ways to make this email stand out from others people may be receiving from Democratic organizations. Promote activities and initiatives in the district that would interest potential contributors and spur them to click on the link and donate!

## Other Donations

If an endorsed candidate has already received the maximum amount of donations from political action committees, the candidate may suggest that these donors give funds to the Organizing Unit instead. It is also possible that candidates from other districts may donate to the Organizing Unit in general support of its campaign activities. By law, these funds cannot be "ear-marked" for a particular candidate's benefit.



*Our party's success depends on DFLers spreading our message far and wide. Local units should identify a Communications Coordinator to write letters to the editor, and maintain the unit's website and social media accounts. Send the name of the Communications Coordinator to the Communications Director at the DFL to keep informed of current messaging and projects. The DFL has invested in resources to support this critically important work and most of these resources are available to local party units free of charge.*

## Local Unit Websites

The DFL Party has invested in campaign cloud infrastructure that lets Organizing Units and candidates create and host secure, donation-ready websites with the latest digital tools all free of charge. The WordPress platform is easy to use and allows for full customization from the Organizing Unit and candidates. To set up your own local unit website, contact the Communications or Party Affairs Director.

## Research and Talking Points

The DFL Communications office provides resources to help our party leaders and candidates communicate our message effectively. The communications team has multiple newsletters to keep you updated. Subscribe to “In the know” for top headlines and key events, “Monday Memo” for DFL talking points, “Toolkit” for sample social media content, and “Dispatch” for deep dives on important topics. Email the communications director to subscribe to these newsletters.

## Social Media

Being active on social media can substantially increase your local unit's overall presence in the area. You can set up your own Facebook, Twitter and Instagram accounts for free. Local units are encouraged to follow the State DFL's social media accounts (see below) and repost / retweet our material. All photos taken at DFL events are posted on the DFL Flickr account.

*Be sure to join us on social media!* ↘



*Facebook*

**Facebook.com/  
MinnesotaDFL**



*Twitter*

**Follow us @  
MinnesotaDFL**



*Instagram*

**Follow us @  
MinnesotaDFL**



*YouTube*

**YouTube.com/  
MinnesotaDFL**



*Website*

**DFL.org**



# Voter File, VoteBuilder, VAN

*Voter File, VoteBuilder, VAN (Voter Activation Network) are all names for the DFL's Voter File. The DFL, in partnership with the DNC, maintains an online database of all the registered and potential voters in Minnesota. This system is updated 12-15 times each year with new voters and vote history from the Secretary of State and enhanced with data from our vendors (new addresses, phone numbers, and consumer information).*

## Campaign Tool

The DFL Voter File is the primary resource for the Minnesota DFL, local party units, and DFL campaigns for all voter contact activities (phone calls, door-knocking, mailings, direct communications, etc.). The Voter File also has a feature called My Campaign which is designed to efficiently manage volunteers and volunteer activities.

## Sharing Info

As a true grassroots system, the Voter File enables DFL party units and campaigns to benefit from each other. If one campaign or party unit finds a bad phone number and marks it in the database, no one else will waste time calling a bad phone number. If one campaign or party unit collects new contact information to more efficiently contact a voter all other campaigns and party units benefit from that information. Additionally, when party units and political campaigns identify a new voter as a DFLer or Republican all other committees benefit from that information. With the Voter File, all campaigns can work together by sharing their voter ID's to better target their valuable resources.

## Access

To gain access to this resource, the party unit Chair must request user accounts by submitting the first name, last name, and email address via email to [voterfile@DFL.org](mailto:voterfile@DFL.org).

## Training

For information on VAN training, visit [dfl.org/van](http://dfl.org/van). There, you can find information about weekly live trainings, the VANual, and the VAN Support and Knowledge base, where you can find answers to frequently asked questions or submit a support ticket for personalized help.



## Priority Motions

The motions below are listed in order of precedence. A motion can be introduced if it is higher on the chart than the pending motion.

You Want To:	You Say:	Interrupt?	Second?	Debate?	Amend?	Vote
Close the meeting	I move to <b>adjourn</b>	No	Yes	No	No	Majority
Take a break	I move to <b>recess</b> for...	No	Yes	No	Yes	Majority
Register a complaint	I rise to a <b>question of personal privilege.</b>	Yes	No	No	No	None
Close debate	I move the <b>previous question.</b>	No	Yes	No	No	2/3
Limit or extend debate	I move that <b>debate be limited (or extended) to...</b>	No	Yes	No	Yes	2/3
Postpone to a certain time	I move to <b>postpone the motion to...</b>	No	Yes	Yes	Yes	Majority
Modify wording of motion	I move to <b>amend</b> the motion by...	No	Yes	Yes	Yes	Majority
Bring business before assembly (a main motion)	I move that (or to)...	No	Yes	Yes	Yes	Majority

## Incidental Motions

No order of precedence. Arise incidentally and are decided immediately.

You Want To:	You Say:	Interrupt?	Second?	Debate?	Amend?	Vote
Enforce rules	<b>Point of order</b>	Yes	No	No	No	None
Appeal a ruling	I <b>appeal</b> the decision of the chair.	Yes	Yes	Varies	No	Majority
Suspend the rules	I move to <b>suspend the rules</b> for the purpose of...	No	Yes	No	No	2/3
Split a motion into two or more parts	I move to <b>divide the question.</b>	No	Yes	No	Yes	Majority
Demand a counted vote	<b>Division</b>	Yes	No	No	No	None
Question parliamentary procedure	<b>Parliamentary inquiry</b>	Yes	No	No	No	None
Request information	<b>Point of information</b>	Yes	No	No	No	None

## Motions Classified According to Purpose

<b>Bring before the body</b>	<b>Move an action or resolution for consideration.</b>
<b>Modify a motion</b>	<b>Amend:</b> add and/or delete words in the main motion. <i>An amendment may be amended once.</i>
<b>Suppress debate or hasten action</b>	<b>Previous question (Call the Question).</b> <i>A motion to close debate immediately. Requires 2/3 vote.</i> <b>Limit debate.</b> <i>Move to limit to a specific time or number of speakers. Requires 2/3 vote.</i> <b>Suspend rules for the purpose of__</b> <i>Change established agenda or rules. Requires 2/3 vote.</i>
<b>Delay action</b>	<b>Postpone to a definite time.</b> <b>Refer to committee.</b> <i>Refer for study and report to the body at a later time.</i>
<b>Prevent action</b>	<b>Postpone indefinitely.</b> <i>Kills the motion.</i> <b>Object to consideration.</b> <i>Requires 2/3 vote.</i> <b>Withdraw a motion.</b>
<b>Consider more carefully</b>	<b>Extend debate.</b> <b>Divide question.</b> <i>Divides motion into distinct parts, each voted on separately.</i> <b>Demand a counted vote.</b> <i>Used when the results of a voice vote are in doubt.</i>
<b>Change a decision</b> <i>(Bring a Question again before the assembly)</i>	<b>Reconsider.</b> <i>Maker of motion must have voted on the prevailing side. Requires 2/3 vote.</i> <b>Rescind or Amend Something Previously Adopted.</b> <i>Maker of motion must have voted on the prevailing side. Requires 2/3 vote.</i>
<b>Maintain rules and order</b>	<b>Question of privilege.</b> <i>May not be used to continue debate.</i> <b>Point of order.</b> <i>May not be used to continue debate.</i> <b>Appeal from decision of Chair.</b> <i>Question a ruling of the Chair.</i>
<b>Parliamentary inquiry</b>	<b>Question parliamentary procedure on an issue.</b> <b>Request for information.</b>
<b>Close a meeting</b>	<b>Adjourn.</b> <i>Ends all business for this meeting.</i> <b>Recess.</b> <i>Meeting will continue its business at a later time.</i>

---

*Note: This is a brief presentation of the most commonly used actions in a meeting and is not intended to be definitive. Refer to Robert's Rules of Order Newly Revised, 11th ed. or [robertsrules.com](http://robertsrules.com).*

### Candidate Recruitment

Well before the campaign season begins, local party unit officers should be considering potential candidates for future election. Even in those districts where long-term DFL incumbents hold office, party units should be preparing for the day when that official decides not to seek re-election.

School boards, town boards, city councils and commissions are excellent proving grounds for future legislators. Party units should consider endorsing or voting on a resolution of support (in non-partisan races) for selected DFL candidates for these offices, to allow these candidates to develop a base within the DFL local party unit. Even if the unit does not choose to endorse, recruiting progressive candidates to run for local offices is key to building a “farm team” of candidates for future legislative races.

Activism on a popular community issue or event is an important quality for a candidate. For example: the president of a youth athletic association, the leader of a recycling initiative, or an activist who helped save or restore open space, brings a built-in base of supporters and volunteers in addition to the party organization.

However, a person does not need to be a popular community leader or elected official to be a successful candidate. Finding someone who can take advantage of factors like these can be as important as finding a well-known candidate:

- Issues that are important to all residents in the district (garbage pick-up, snow removal, public spaces, etc.)
- Any outside factors that might affect the race, such as a national economic downturn or a statewide candidate with wide appeal
- Weaknesses displayed by the opposing candidate

Candidates should be reminded that they may need to run more than once before they are successful. Rather than being a handicap, an initial loss often provides seasoning for a campaign, allowing it to:

- Build on name recognition
- Learn from earlier mistakes
- Avoid “start-up” costs including: campaign logo, website, lawn signs and office equipment

The local party unit role in recruiting candidates is chiefly to identify people with potential and build a supportive relationship. It may require the involvement of recruiters from the House or Senate Caucuses to get a candidate’s commitment to run for a legislative race, but vital groundwork is laid by a local unit that makes a long-term commitment to the process.

**Your role in recruiting candidates is chiefly to identify people with potential and build a supportive relationship.**

### Candidates and the Party Unit

Developing and maintaining positive working relations with DFL-endorsed politicians is a top priority for local party officers. Often, there is very little problem in this area as the politicians value their local DFL organization. However, some choose to separate their own campaign organization from the party for a variety of reasons:

- The district’s voting history indicates significant Republican leanings, so they strive to maintain an independent image to appeal to a broader number of voters
- They seek to maintain control over their own campaigns
- They are at odds with members of the local party over key issues
- They have been in office long enough to not depend on the local party for donations, volunteers or other resources.

While these reasons may have some validity in certain circumstances, in the long run, it is best for the party and the politician to build a mutually supportive relationship. DFL officeholders should recognize the value of building the party unit in order to maintain a strong political base. They should be encouraged to participate in every party unit meeting and event and be open to passing on information to activists about pending legislation and other matters of interest, as well as coordinating party unit efforts to build community support for legislation.

This vital relationship should not begin nor end with endorsement. Here are some tips for getting started on a strong footing:

- If there is more than one candidate seeking endorsement for the same office, it is imperative that the local party unit Chair and Vice Chair maintain impartiality throughout the process – and good practice for the Outreach Officer, Secretary and Treasurer to do the same.



**A basic guideline for all party officers is: when it comes to money, do not assume you know what is legal. Ever.**

- Provide opportunities for all candidates for endorsement to meet with unit activists and other potential voters at events, forums, meetings, etc. Ensure equal access and opportunities for campaigns in every way.
- Be prepared to present a check for a substantial donation from the party to candidates who win endorsement. It is a powerful reinforcement of the party unit's value to their campaigns.
- Once the unit has endorsed a candidate, encourage unsuccessful candidates and their volunteers to stay involved with a welcoming approach and positive suggestions for their continuing participation.

### Role of the Party in Campaigns

Local party unit leaders play a demanding role during an election year in campaigns of DFL-endorsed city, county, legislative and statewide candidates. The most effective officers focus on maintaining the party unit, recruiting volunteers and interfacing with the coordinated campaign, instead of getting too involved in any particular campaign. At the same time, Directors and other Central Committee members should be closely involved in specific campaigns to keep the lines of communication open between the party unit and its candidates.

All election activity is governed by both state and federal laws. In addition, some regulations administered by the U.S. Postal Service and the Internal Revenue Service also apply. For local party units, the Minnesota Campaign Finance and Public Disclosure Board (CFB) is the primary clearinghouse of information regarding compliance and reporting requirements. Local party units should only be involved in funding state-level activities and, therefore, do not typically need to be concerned about Federal Election Commission rules.

Generally speaking, if it involves money, in any form, from any source, received or expended by a party unit, there are rules that must be followed to the letter or the party risks hefty fines and negative publicity – and these rules can change. A basic

guideline for all party officers is: “When it comes to money, do not assume you know what is legal. Ever.” It is also important to understand that the rules for party units are not the same as the rules for campaigns. There may be some crossover, but party unit officers should not take advice from campaigns, even from their Treasurers, about what is legal and how funds must be reported (or vice versa).

There is detailed information in the Party Unit Handbook, found on CFB website. Unit Chairs and Treasurers should familiarize themselves with its content and keep it handy for reference. In addition, checking in advance with an advisor at the CFB on an activity you have planned can prevent problems that could be costly later, if funds are collected or spent illegally, or reported incorrectly.

Here is some additional information to keep in mind:

- Officers should never assume a party unit activity is legal just because it has been done in past years. Many activities commonly thought of as legal or exempt, are not and ignorance of the law has not been a successful defense for political parties. Check with the CFB and be sure.
- All party materials must have a disclaimer accurately stating what entity “prepared and paid for” the material. Only buttons and other small items are excluded from this requirement.
- Literature, clothing items, banners, buttons, etc., should always be printed by a union printer and display the union “bug.” In addition, all items purchased for imprinting should be “Made in U.S.A.” These important considerations demonstrate a commitment to the principles of the Minnesota DFL.
- It is illegal for a candidate or campaign to falsely claim an endorsement of any kind. This includes most uses of “DFL” or “Democratic-Farmer-Labor” or even “Democrat” unless the candidate is duly endorsed during the current election cycle by the Minnesota DFL.
- Candidates or campaign representatives should not be present or consulted when a party unit is considering campaign donations or any independent expenditures.
- Party units may not serve as a conduit for “pass-through” contributions to any candidates. This is known as “ear-marking” and is illegal under both state and federal law. This, and other restrictions are expressly listed in the CFB’s Party Unit Handbook.
- Representatives of all candidates seeking endorsement should be present for rules committee meetings in advance of an Endorsing Convention.

Building a strong and effective party unit takes time and requires officers to have a vision for the future, beyond the current election cycle, and a plan for how to get there. Campaigns and candidates are focused in the near term on winning the upcoming election. This difference in focus has the potential for conflict between campaigns and the party. It is up to the leaders of the party unit to keep these dual efforts in sync while maintaining appropriate separation when it comes to finance and other support.

### The Coordinated Campaign

The State Party, through the state DFL Constitution and the Official Call, governs the process by which the Party endorses its candidates for public office. However, the Party organization does not control the Party's candidates (endorsed or unendorsed), their campaigns, or the coordination among them. The Party has therefore established the DFL Coordinated Campaign for the purpose of bringing together and supporting its candidates.

The Party has vested the authority and responsibility for the Coordinated Campaign in the UDF Board, rather than in the Central Committee, the Executive Committee, or another governing body in the Party's constitutional structure. A campaign is a battle, where the capability of centralized decision-making and rapid response are essential, and for which the Party's more democratic institutions are generally unsuited because of their size and their deliberative processes. The UDF Board enjoys another distinct advantage over the Party's committees: its members need confide only in each other, and can therefore

avoid telegraphing their strategy to the world, as almost inevitably happens in the open meetings in which the Party's committees deliberate.

But because the UDF Board operates in such a fast-moving and sensitive environment, its operations are often a mystery even to Party officers, and a mythology has grown up around the United Democratic Fund and the Coordinated Campaign.

The UDF Bylaws state: "The purpose of the United Democratic Fund . . . is to provide a cooperative mechanism for the DFL State Party, its candidates, and political subunits to conduct elections programs and fundraising for those programs. Central to these efforts is the establishment of a statewide database for a comprehensive voter identification and get-out-the-vote program. This program would support the election efforts of DFL endorsed candidates throughout Minnesota, especially in targeted districts where endorsement has occurred. . . ."

In short, the Coordinated Campaign is a platform from which the State Party delivers services to all candidates:

- The Coordinated Campaign can't get every DFL-endorsed candidate elected.
- Some candidates win without the help.
- Some candidates don't win even with the help.
- But ideally, the Coordinated Campaign boosts as many candidates as possible over the threshold.





# Training

*The Minnesota DFL is committed to training people at all levels of experience as local party leaders and campaign volunteers, building skills to lead successful party units, promote DFL values, attract new voters, support our candidates and win elections. Beyond the training opportunities listed below, specialized training for Voter File users is available online at [DFL.org/VAN](https://dfl.org/VAN). Minnesota legislative candidates receive training directly from the House and Senate Caucuses.*



## Wednesday Party Leader Calls

Every Wednesday at 5:00 pm, the Training and Party Affairs team hosts a call for party leaders across the state. This zoom call includes a mini training, a time to meet with and talk to other party leaders, and a time to ask any questions that you may have. The training is often tailored to whatever is going on in the party at the time. We cover everything from caucus and convention planning, to basic skills like document retention and hospitality. Information about these calls can be found on the weekly DFL Training Update email. Contact [training@dfl.org](mailto:training@dfl.org) for more information.

## DFL Training Summit

The Training and Party Affairs Department hosts a Training Summit periodically. The state party recruits trainers from DFL-aligned organizations to train on things like campaign finance, volunteer recruitment, communications, and more.

## Training Tours

In addition to training summits, Party Affairs takes the “Vantastic” on the road to conduct training across the state. These are often accompanied by pop-up shops and times to gather socially with leaders in your area.

## Chair Certification

Anyone chairing a DFL convention must be certified by the state party. In order to become certified to chair a convention, a prospective chair must complete the Convention Chair training. This certification lasts for two years. The training includes preparing for the convention, a general agenda for a convention, voting procedures used by the DFL, and introductory information on parliamentary procedure.

## DFL Training Hub

The DFL Training Hub is maintained by the Training and Party Affairs Department. The training hub houses signups for live training, recordings of live training sessions, and on-demand training to ensure that our leaders are set up for success. To create an account on the Training Hub, go to [mndfl.litmos.com/self-signup](https://mndfl.litmos.com/self-signup) and enter the code `dfl` (all lowercase).



# Prescription for a Healthy Party Unit

*The points listed here are a brief outline of the goals, tasks and activities displayed by strong, active Organizing Units. This prescription can be used to 'jump-start' a local unit to achieve new levels of success.*

## Organizational Structure and Meetings

- Meet regularly in non-election years (at least 3-4 times) and monthly during election years.
- Have 10 or more people attending every meeting.
- Invite guest speakers and plan engaging activities at meetings to attract more attendees.
- Plan social get-togethers for area Democrats in public venues to attract newcomers who want to meet like-minded people.
- Attend meetings and events where under-represented people gather and learn what their concerns and motivations are.
- Conduct voter registration actions at local schools and seek out politically-minded students for volunteering.

## Fundraising and Budget

- Draft an annual budget: set goals for the year and make a plan for how to raise needed funds. People are often more willing to donate when they know how the money will be put to use.
- Plan a new fundraising event each year, in addition to the tried-and-true barbecue or corn feed, and try new ways to invite and attract new people.
- Ask for donations at every meeting and gathering to cover costs and more, by offering a reminder that their contributions are the only means for funding party unit activities and supporting candidates.
- Donate the maximum allowable amount to their endorsed candidates every year.

## Communication

- Recruit tech-savvy volunteers (a great leadership opportunity for high school and college students) to manage the unit website and social media.
- Understand the value of their website as a communication and organizing tool.
- Actively push information to voters using all available media: their website, Facebook page, Twitter, letters to the editor, local newspaper columns, printed materials and email.
- Make news by holding candidate forums and issues discussions, and posting the details in real-time on Facebook and Twitter.
- Utilize the political news of the day distributed by the state DFL Communication team for website and social media postings.
- Have an active letter-writing that collaborates on sending letters to local and statewide publications pro-actively or in response to letters written by political opponents.



# Prescription for a Healthy Party Unit

## Campaigns and Elections

- Recruit and support Democratic candidates for local offices (partisan and nonpartisan) – commissions, school board, city council, etc. – to build the bench of candidates for higher office.
- Understand the value of canvassing (by phone and door knocking) to identify the political leanings of voters listed in the VAN as “no data/unknown” to streamline future campaign efforts and reach all those prone to vote for DFL candidates.
- Build and regularly update a contact list of area volunteers and ask for their help in recruiting others.
- Conduct voter registration drives in apartments, senior housing, high schools, colleges, and during public events to engage with new voters and promote the importance of political action.

## VAN/VoteBuilder/Voter File

- Conduct regular phone banks and door knocks to reach voters and identify supporters throughout the election cycle.
- Provide volunteers to other units needing help with their canvassing efforts.
- Understand the great value the VAN provides to local, legislative, statewide and national campaigns for reaching supporters, potential volunteers and likely Democratic voters.
- Emphasize the need for unit officers and activists to acquire skills in using the VAN.
- Educate candidates on the need to better target their voter contact efforts by using the VAN to easily find likely supporters and adding new information as it is gathered.

## Training

- Train activists in techniques for canvassing by phone and at the doors.
- Ensure that unit officers and activists are well-versed in party rules (found in the DFL Constitution & Bylaws and the Official Call) and in Campaign Finance regulations for party units.
- Train Precinct Caucus conveners thoroughly. Walk through materials they will use to conduct the Caucus and report results.
- Offer orientation sessions for new Caucus attendees.
- Provide training for volunteers doing VAN data entry following Precinct Caucuses.
- Train volunteers in procedures used at Unit Conventions for credentials, resolutions, etc.

## General

- Take action to improve unit performance year to year, looking for ways to do things better or try something entirely new.
- Set concrete goals and deadlines for volunteer recruitment, money raised, website visits, Facebook ‘likes,’ etc., celebrate success and then raise the bar higher!
- Compete and win against Republicans in other ways when winning elections is difficult: a bigger and better booth at the County Fair, more lawn signs per square mile, best locations for Precinct Caucuses and Conventions, better website, more letters-to-the-editor, and so on.
- Encourage unit leadership by rotating responsibilities among the officers and other volunteers to keep everyone engaged, energized and ready to tackle new challenges and opportunities.



## MINNESOTA DFL PARTY

255 East Plato Boulevard

St. Paul, MN 55107

651-293-1200 | 1-800-999-7457

---

**WEBSITE:** [DFL.ORG](http://DFL.ORG)

**FACEBOOK.COM/**[MINNESOTADFL](https://www.facebook.com/MinnesotADFL)

**TWITTER:** [@MINNESOTADFL](https://twitter.com/MinnesotADFL)

**INSTAGRAM:** [@MINNESOTADFL](https://www.instagram.com/MinnesotADFL)

**YOUTUBE.COM/**[MINNESOTADFL](https://www.youtube.com/MinnesotADFL)

Prepared and paid for by the Minnesota DFL Party, Ken Martin, Chair,  
[www.DFL.org](http://www.DFL.org). Not authorized by any candidate or candidate's committee.