

# **For League Presidents:**

# **GETTING STARTED**

## **REQUIREMENTS FOR LOCAL LEAGUES**

There are some things all local Leagues **MUST** do. To keep on top of these requirements, you should assign or re-confirm these responsibilities as soon as your new board is in place.

### **Federal and state requirements:**

- Your League must keep to a July 1 through June 30 fiscal year.
- File your 990-N federal tax return on line annually between July 1 and November 15.
- If your League is incorporated, annually file your corporate report on line with the Secretary of the State's office in the anniversary month of your incorporation, and send the \$50 fee.
- Have at least one general meeting per year.
- Your League's bylaws should match the way you actually operate (and vice versa).

### **LWVUS requirements:**

Delegates to the LWVUS Conventions in 1986 and 1994 voted the following measurable and enforceable requirements that Leagues must fulfill in order to receive or maintain recognition:

- The League must have bylaws, the first three articles of which must be consistent with those of the LWVUS. Remaining articles must provide for democratic procedures.
- The League must establish and maintain a nonpartisan policy.
- The League must hold annual business meetings of the membership.
- The League must hold regular board meetings.
- The League must contribute to the financial support of the League as a whole (pay PMP).
- The League must have a plan for membership growth and retention that encourages membership as diverse as the community.
- Any advocacy pursued by the League must be consistent with League principles, positions and policies.

Because your League's PMP is set on an annual deadline, usually January 31<sup>st</sup>, your League must update its membership roster in the LWVUS's on-line database before the deadline.

## **REQUESTS TO LOCAL LEAGUES**

### **LWVUS requests:**

- As soon as possible after your new board is elected at your Annual Meeting, update your League's board list and mailing address in the LWVUS's on-line database.
- Update your League's email and mailing addresses in the LWVUS's on-line database if and when they change.
- If possible, update your League's membership changes as they happen, but in any case review and update your list at least once a year (in December or January).

LWVCT requests (all communications may be by either e-mail or paper copy):

- Send LWVCT your bulletin (“Voter”) and any other publications as they’re published.
- Send LWVCT your new board list ASAP after your Annual Meeting.
- Send LWVCT any other board member changes as they occur.
- Send LWVCT your proposed bylaws changes, if any, 2 to 3 months before your annual meeting, so that the LWVCT bylaws committee can review them and return suggestions.
- Send LWVCT your adopted bylaws changes after your annual meeting.
- After you’ve reported membership changes on-line directly to the LWVUS, please ask your treasurer or membership director to tell the LWVCT office, preferably by e-mail, to update the LWVCT database to match.
- If your League is sending a delegate, delegates, or audience members to an LWVCT event, please let the LWVCT office know in advance, whether by on-line registration, email, or paper registration slip sent with your check. (If a minimum level of attendance is not met, the event could be canceled without notice except to those pre-registered.) However, because fees for state-run League events are not refundable, attendees are usually allowed to pay at the door.

## MEMBERSHIP

A reminder:

When a person becomes a member of a local League, he or she automatically becomes a member of LWVCT and LWVUS.

A Tip or Two:

Have someone in your League (usually your treasurer or membership chair) enter all membership changes (additions, inactivations, deaths, address or other changes) into the LWVUS on-line database as they happen, or at least monthly. **Please do not wait until the end of the membership year.** However, your League does not have to update your members’ “expiration dates” one-by-one — the person who’s updating your data can use the LWVUS’s “update roster expiration dates” function at the end of January after she’s cleaned up your on-line membership list.

## BYLAWS

Because your Bylaws must conform to LWVUS and LWVCT requirements, you should send any proposed local bylaws changes to the LWVCT for approval before submitting them to your membership. Please consider any bylaw change recommendations that the LWVCT’s bylaws committee sends back to you.

## FINANCE

- Make sure that someone at your League keeps a record of your League’s income and expenses.
- Your League may pay PMP (per-member payment) to LWVCT and LWVUS on a quarterly, semi-annual, or annual basis (deadlines are July 1, Oct. 1, Jan. 1, and April 1). Your treasurer should refer to the bills from LWVCT and LWVUS for proper amounts.
- If possible, have someone other than your treasurer review your books annually or biennially. At the very least, review the books immediately before your outgoing treasurer hands them over to her successor.

## 8 TIPS FOR NEW PRESIDENTS

**Start a master calendar.** This can be a pocket calendar, notebook page, or wall calendar — whatever works for you. Include at least your League's major events to start, and fill in other items as needed. Note your League's deadlines for nominating, Program, budgeting, etc.

**Set up a notebook and/or filing system** for League materials, or learn the one given to you. The notebook or master file should contain at least the following documents from your League:

- Bylaws
- Membership list
- Board list
- Budget
- Program, including a list of the year's priorities
- Board/Leaders' Reports (if you do these)
- Minutes
- Treasurer's Reports
- Policies
- Calendars

**Delegate!** Do not fall into the trap of doing work for which someone else is responsible.

**Use your Board:** do not make decisions alone.

**When you get mail or e-mail from LWVUS or LWVCT, read it, then throw it out, file it, or pass it on.** Most LWVUS and some LWVCT requests will be sent to you, the President, even when both organizations have the names of your treasurer, membership director, etc. Develop an efficient method for forwarding the various items to the person in your League who handles each.

**When in doubt, call:** your state Board, state office, and national staff are here to help you.

**Learn your League's nonpartisan policy.** Your board should review this policy at least once every year.

**Keep copies of important letters.** You may want to start a correspondence file.

## 8 REFERENCES YOU'LL WANT AT HAND WHEN QUESTIONS COME UP

A copy of your League's bylaws. Familiarize yourself with the deadlines in your bylaws for nominating, program, budget and bylaw changes.

Copies of the various booklets in the LWVCT Local League Reference Series.

*League Basics*. *League Basics*, which is available at <http://www.lwv.org/content/league-basics>, is a 16-page publication that "replaces" *In League*, the 139-page "booklet" that was sometimes called the League Bible. Because *League Basics* is so short, most of *In League*'s former contents is now available only on line at various places on the LWVUS website, [www.lwv.org](http://www.lwv.org).

The LWVCT "cheat sheet" Parliamentary Procedure at a Glance (a copy is included in *You and Your League* and in every LWVCT Convention workbook).

LWVCT's *Connecticut Impact on Issues*. *Impact* contains all of the state League's policy positions, organized by subject (government, natural resources, social policy, etc.) The short form of *Impact* is the LWVCT's tri-fold flyer "Positions in Brief." Your League can *not* take a policy position at odds with any of the positions adopted by the LWVUS and LWVCT, although you may remain silent on any issue.

LWVCT's *Connecticut League Directory*. The *Directory* contains the names, addresses, e-mail addresses, and phone numbers of the LWVCT Board and off-Board specialists, the LWVCT "Public Issues" team, the Symposium on International Relations committee members, staff at the League office and at Capitol Information and Tours, and all local League officers and board members.

LWVUS's *President's Packet*. The *President's Packet* contains contact information, LWVUS standards for local Leagues, a list of LWVUS resources, and best practices for nonpartisanship, membership growth, diversity, financial development, etc. It's available as a PDF at <http://www.lwv.org/content/Presidents%20Packet>.

LWVUS's *Impact on Issues 2014-2016*. *LWVUS Impact* contains all of the national League's policy positions, organized by subject. It is available on-line via the LWVUS website, [www.lwv.org](http://www.lwv.org); the print version can be ordered from the LWVUS by going to <http://store.lwv.org>. A limited number of copies are available at the LWVCT office for reference.

# WHAT THE LEAGUE CAN DO FOR YOU:

## LWVCT

### Operational Assistance:

**Financial Mini-Grants:** The LWVCTEF allocates funds for mini-grants for local Leagues' new projects in two areas: membership initiatives and voter service initiatives. The awards will be decided by a committee of Board members.

**Free Publicity:** You can publicize any local League activity that would be of interest to others around the state by e-mailing your flier/write-up to the LWVCT office. It can be posted on our website and/or your website, or e-mailed to every local League board member in the state E-News (the deadline is the second Tuesday of each month except July and August) or in separate e-mail notices. All submissions are subject to editing, and the LWVCT president has final approval of all communications.

**Website Hosting:** the LWVCT will provide webmaster services and websites to any League in the state.

### Membership Assistance:

- **Data management:** The LWVCT office staff can furnish you with copies of your membership list by mail or e-mail, and provides telephone and on-line assistance with membership questions and problems.
- **Member Activities/Advocacy:** Even if your League is not heavily involved in Public Issues, anyone interested in joining the League's advocacy efforts in Hartford can sign up to become a "ten minute activist" at <http://www.lwvct.org/10-minute-activist.html>.
- **Member Activities/Other:** The LWVCT encourages local League members to join in state-level activities such as the Symposium on International Relations (SIR) Committee, other event-planning committees, concurrence or consensus committees, etc. This can keep members active even if your League is not strong in their areas of interest.
- **Renewals:** The LWVCT has printed membership envelopes that every League can use, and sells them to local Leagues at cost, currently 16¢ per envelope. The LWVCT office staff will help draft and/or mail renewal letters for any League on request.

**Study/Concurrence Assistance:** The LWVCT keeps a list of volunteers who can help your League get speakers and materials for any study, concurrence, or consensus that the LWVCT or LWVUS is asking you to participate in; if your League is planning on a local study, at your request the LWVCT can suggest who on the PI Team or in other Leagues can provide guidance or expertise.

**Political Action Assistance:** the LWVCT Public Issues Team often has written position statements that might be helpful in preparing testimony before government committees, letters to the editor of your local paper, etc. These are available on the Advocacy page of the LWVCT website. Some PI Specialists may also be available to speak at local meetings and can be contacted via the office.

### **Insurance and Finance:**

**D&O Insurance:** Your League has the option of buying Directors' and Officers' "Errors and Omissions" insurance from the same agency the LWVCT uses (the Monroe Insurance Agency, broker Peter Lozier), at below-market rates. The cost, currently about \$300 per year, is billed directly to your League.

**Liability Insurance:** Your League's liability insurance is renewed automatically each June (via Ned Miller Associates). Coverage is \$2,000,000 per incident with a cap of \$4,000,000 per year. The \$12 cost is billed with your League's first PMP payment.

**Tax Status:** the LWVCT maintains an IRS "group exemption" that covers all of Connecticut's local Leagues. The state office staff updates the list and files the required reports with the IRS every year to maintain your League's 501(c)(4) status. The state office will also provide help and information, as requested, regarding your League's annual 990-N IRS filing.

### **Publications and Communications:**

You can order, via mail, fax, or e-mail, any state League publication through the LWVCT office. Orders can be billed to or pre-paid by your treasurer. If a League member will be in Hamden, call and arrange for pre-packaged pick up; other orders will be mailed. Note: If your League is in arrears in its per member payment (PMP) to the LWVCT, the LWVCT office may deny any request for extra materials until your League account is balanced.

**Electronic Voters' Guides:** During election season in even-numbered years, the LWVCT posts candidate information on the LWVCT website. In odd-numbered years we will help local Leagues publish such guides on their web pages if we host their sites.

**State E-News:** LWVCT provides an e-mailed state E-news (formerly known as the Board Report) to the members of all local League boards approximately three days after each state Board meeting, and also posts the current and two most recent issues of the E-News on our website. If you are not on the internet, the LWVCT will provide one hard copy of the E-News per League to you.

**State Mailings or E-Mailings:** League Presidents may request a set of Local League handbooks and the state League Directory, and will receive a copy of all study kits (as published), and notification of new LWVCT sales items and publications.

**LWVCTTopics E-Mail Group:** Share news from your League! The LWVCT hosts a Yahoo Groups listserv that helps League members send news, announcements, or questions to other CT members via an e-mail group. Your news automatically goes to all members of the group. It's open to any League member. To join, go to the LWVCT website, click on Resources, For Members, Subscribe.

**Website:** the LWVCT website, [www.lwvct.org](http://www.lwvct.org), has sections on events, advocacy/public issues, membership, etc., and a main page or link for each local League. It is a source for copies of LWVCT publications and current voter information.

## **LWVUS**

**Liaison:** The LWVUS assigns a national board member as a liaison to every state League; our national liaison is available to answer local League leaders' questions via email.

**Lobby Corps and Action Alerts:** Any League members can sign up for the LWVUS Grassroots Lobby Corps and get e-mailed action alerts as soon as they are created. The LWVUS e-mails Action Alerts to all state Leagues and to all members of the Grassroots Lobby Corps.

**Membership Database:** The LWVUS membership database is available 24/7 to all local Leagues, and can be used as your primary or backup source of membership information. Your League's data can be read on screen or downloaded as a spreadsheet.

**Publications:** there is a list of available LWVUS books, magazines, and e-communications in the LWVUS *President's Packet*. The LWVUS e-mails bi-weekly League Leaders' Updates. The LeagueE-Voice e-newsletter is e-mailed to every League member for whom the LWVUS has an e-address.

**Tax exemption:** The LWVUS takes action as necessary to protect all Leagues' 501(c)(4) status and the various League education funds' 501(c)(3) status.

**Use of the LWVUS Ed Fund:** Local Leagues that do not have Education Funds can arrange to have a sub-account set up for their tax-exempt activities by the LWVUS Ed Fund. If the LWVUS approves your project(s), they will act as a bank for money donated to you: you can draw funds out with a simple voucher request, and your donors will be able to get a tax deduction for their gifts. (Funds given to a League are not otherwise tax-exempt.)

**Website:** The LWVUS website is extensive, and the LWVUS provides on-line assistance if you cannot find what you're looking for on the first pass. A tip: it may be easier to use Google to find what you're looking for on the site.

## HOW TO REACH THE LWVCT OFFICE

The office is staffed by an Administrator, Jean Rabinow. **Office Hours** are Monday through Friday (Monday-Thursday in July and August), 9:30 a.m. – 5:00 p.m. Holiday closings are listed in the Calendar that comes in the Board Report each month.

By phone: 203-288-7996

By fax: 203-288-7998

By mail: 1890 Dixwell Avenue, Suite 203, Hamden, CT 06514-3183

By e-mail: [lwwct@lwwct.org](mailto:lwwct@lwwct.org)

By web site: [www.lwwct.org](http://www.lwwct.org)

By car:

**From Merritt Parkway/Wilbur Cross coming from west (NY) or east (Hartford):**

Take exit 60. Turn right onto Dixwell Avenue. \*Turn right into drive just past Dunkin' Donuts. Our office is in the red brick building at the corner of Benham Street. Suite 203 is on the second floor at the head of the front staircase (the one facing Dixwell Avenue), and can be reached by the front stairs or by the elevator in the rear lobby.

**From CT Turnpike, West of Milford:**

Take Exit 30 onto Merritt/Wilbur Cross heading northeast; follow from \* as above.

**From 91 coming from Hartford:**

Take Exit 10. Take first exit from connector. Left from ramp, left at first light, right at next light. Travel south on Dixwell Ave. approximately 2.9 miles. Then continue from \* above.

**From 91 coming from New Haven:**

Take Exit 10 Hamden/Cheshire. Follow connector. Take State Street Exit onto Dixwell Avenue south approximately 2.9 miles. Follow from \* above.

## HOW TO REACH THE LWVUS OFFICE

By phone: 202-429-1965

By fax: 202-429-4343

By mail: 1730 M Street NW, Suite 1000, Washington, DC 20036-4570

By e-mail: [lww@lww.org](mailto:lww@lww.org)

By web site: [www.lww.org](http://www.lww.org)

