

GUIDELINES FOR LEAGUE STUDIES

These are general guidelines for LWVUS studies and may vary somewhat from study to study according to personnel and issue. Local and state Leagues may adapt whatever parts they feel are pertinent.

Suggested Timeline:

Year 1

- June, even-numbered year—Convention adopts study.
- July-September—President appoints Study Chair/Co-chairs who then solicit applications for study committee.
- Fall Board meeting—Board appoints Study Committee. LWVUS Executive Director assigns a member of the staff to assist the Study Committee. Board approves scope.
- November-December—Study Committee meets (in person, if possible), reviews detailed scope, develops a detailed timeline and recommends to the Education Fund Committee either a consensus or concurrence process for the study, unless otherwise determined by the Convention delegates.
- January—Board adopts specific timeline with dates when Leagues will receive consensus materials and deadline for reporting to LWVUS.
- December-March—Study Committee gathers and disseminates information; suggests activities, speakers and reading material; and appoints subcommittees if needed. Local Leagues establish study committees and start gathering information at the local and state levels.
- April-May—Study Committee develops and widely distributes overall summary of issues involved in study in easily printable format with links to references presenting various sides of the issues involved; local Leagues hold meetings on topic.

Year 2

- June-October—LWVEF Study Committee develops consensus questions or concurrence statement, board approves and/or modifies; then committee disseminates to local Leagues. Local Leagues plan their study/consensus calendars.
- October-February—Local Leagues continue research, hold consensus meetings and report results.
- February-April—LWVEF Study Committee Chair, staff and additional Education Fund Committee members, if needed, tabulate results to determine areas of consensus; Study Committee submits a proposed position to the Education Fund Committee. A Member Agreement Committee, including members from the Study Committee and the Education Fund Committee, may be appointed to assist in drafting the position.

- April—Education Fund Committee recommends position statement to LWWUS Board; Board adopts position, announces position and posts on line with info on local League participation, areas of agreement, etc.
- June—Results of study are reported to Convention, discussed. New position is adopted as part of Convention floor program adoption.

Study Committee Appointment

As soon after Convention as possible, the President will appoint an LWWUS/EF board member/trustee as Study Chair and, in some cases, a second board member/trustee to assist the Chair. Co-chairs may be appointed, provided that at least one is a board member. The Study Chair(s) will use direct-to-member electronic communication and other means to distribute the study motion adopted at Convention and invite members to apply for the Study Committee. The Study Chair(s) also may invite members with expertise valuable to the Study Committee to apply.

The appointed Study Committee will be as neutral or as balanced as possible, with members on all sides of the study issue. Experts in the study subject, as well as generalists and members knowledgeable about the League of Women Voters, should be considered, as well as representatives from different areas of the country and different types of communities. The size of the committee will depend partly on the complexity and scope of the study. An ability to work within a diverse group is essential. Applicants will be asked to complete a questionnaire and submit a resume and names of three references, at least one of whom must be their local or state League president.

The Study Chair(s) with help from the Education Fund Committee as needed, will examine materials submitted by the applicants, interview the applicants and their references, select the most suitable candidates, and recommend that the Board appoint them as the Study Committee.

Study Committee Operation

The Study Chair(s), in consultation with a staff member, outside consultant, or League member not on the Committee with project management expertise, will develop a preliminary project management plan. In order to determine where each committee member might best fit into the research process, it is recommended that the Study Chair consult with each member to define that individual's specific roles. The Education Fund Committee Chair's contact information should be provided to the Study Committee members to enable direct consultation if necessary.

Since issue study and position development are essential to League process, some funding ideally will be provided for all studies. If sufficient funding is obtained to cover travel expenses, an in-person committee meeting early in the process is strongly recommended, along with dedicated staffing for editing and formatting final materials.

Communication between the Study Committee and the Board through the Education Fund Committee will be ongoing, with feedback loops at every stage of the process to facilitate identification and solution of any problems. Brief periodic written summaries or minutes will be

shared with all Committee members, the Education Fund Committee Chair and the assigned staff. The Study Chair(s) will report directly to the Education Fund Committee at each meeting of the Board throughout the process. Any subcommittees will communicate regularly with the full committee.

Scope

The LWVEF Board will adopt a Scope of Study based on the action and intent of Convention to adopt the new study or to update an existing position. The Scope of Study statement provides information to allow local Leagues to plan programs and gather materials early in the process. During the entire process, the Study Committee is encouraged to provide suggestions for engagement of both members and the community. The Scope may be adjusted as needed as the study progresses.

Tasks and Products

The Board, with input from the Study Committee and the Education Fund Committee, will choose early in the study between a consensus or concurrence process, unless previously determined by the Convention delegates. This depends in part on how simply the issues of the study may be presented to members.

The Study Committee will write a limited number of brief issue papers on the topic or prepare introductory or summary comments when referring to existing material that can be accessed on line. They also will prepare a Leaders' Guide, which is a guide for consensus or concurrence meetings, including tips for conducting the meetings and clear pointers or links from the questions to the materials.

All reports produced by the committee will be balanced and based on data from valid sources. If committee members lack training needed to evaluate materials from specialized disciplines, they should seek outside assistance. For complex studies, a summary with analysis of issues involved and suggestions for further reading, will be prepared to educate the members prior to their consensus meetings. A single-page handout for meetings also is advised. Materials will be designed to allow easy reprinting by local Leagues. A meeting-ready summary of the study, possibly including visuals, may be made available to Leagues in time for use in meetings preparing for consensus. Videos, webinars, and other formats for presenting material also may be considered. All materials should be readily available on the LWV.org website.

A summary of the results of each study will be posted online in a timely manner to allow members to become familiar with the material. The next Convention will include time early in the Convention and prior to any votes on program items to discuss the results of any studies completed during the preceding biennium. Suggestions for potential advocacy will be presented.

Communications

Two online discussion groups may be established, a closed one for the Study Committee and an open one to support members involved with the study and provide a forum for exchanging ideas and locally produced materials. The Study Chair or designee will monitor the open discussion. It is suggested that the monitor not be too quick to jump in, but let the participants take care of the question/issue, if they can. However, if something is blatant, the monitor should jump in immediately. In other words, use good judgment for each situation. The monitor may start the conversation if things are moving slowly. In case of technical difficulties, the monitor should contact the appropriate staff member.

No member of the committee should monopolize the conversation in the open forum. The forum is for members to discuss and pose questions. When committee members participate in the open member forum, they speak as individuals, identifying themselves as committee members, but adding that each is speaking as an individual. Only the study chair speaks for the study group. The study chair can designate a committee member to speak for the committee on specific issues.

Local League Role

Early in the process, state and local League boards are encouraged to appoint study committees to implement and conduct the study in their local areas. This is an ideal time to engage state or local experts on the topic and to investigate potential impacts of the study on their own state or local area. Local Leagues may take advantage of local speakers and resources and plan and conduct general meetings. All Leagues are encouraged to prepare and conduct local consensus or concurrence meetings, as well as using studies as an opportunity to engage and educate their members and the public in depth, to hear expert speakers and to attract new members.

Consensus Questions

The Study Committee will propose consensus questions through the Education Fund Committee to the Board with adequate time for the Board to consider and adopt them. The writing of the consensus questions is a critical task in the study process, so the Study Committee will want to allow time for the Board to consider the questions carefully. It is often helpful to test consensus questions with a small number of local Leagues, which do not include members of the Study Committee.

Consensus questions ideally are written so that the answers lead directly to a statement of position. Each consensus question is framed so that it is neutral and not intended to lead to a conclusion. Each consensus question is limited to one topic or idea to ensure that no confusion exists as to the intent of the answer. Each consensus question allows for discrete answers that can be easily tallied. The consensus form will contain text boxes to allow for general comments.

Concurrence Statement

If the Board or Convention has recommended a concurrence process, then the Study Committee will propose a concurrence statement to the Board. A concurrence statement is a proposed statement of position on which Leagues or members may only agree or disagree. The proposed concurrence statement follows the same process used for consensus questions. (In some situations, a concurrence statement may be adopted by Convention without a study, and in those cases, these guidelines do not apply.)

Consensus or Concurrence Meeting Reports

The Study Committee and LWVUS staff will prepare an online survey form, with a deadline, for Leagues to use to enter their meeting reports. No paper reports will be accepted. The survey form should be as simple as possible, and the availability of technical support for Leagues to complete this online form is critical.

Determination of Consensus/Concurrence

The Education Fund Committee recommends to the LWVUS Board whether or not consensus has been reached. The Education Fund Committee will involve the Study Committee as appropriate. Consensus is defined as agreement by a substantial majority. Criteria include a minimum number of Leagues participating and some diversity of Leagues, including geographical distribution, states represented, and size of Leagues. If consensus is determined to have been reached, the Study Committee or, alternatively, an appointed Member Agreement Committee, will write a draft position statement and propose it to the Education Fund Committee. The Member Agreement Committee may be composed of board members and/or Study Committee members.

Since many League positions are retained for decades, they should be worded generally and flexibly so they can be used in a variety of advocacy situations. The first paragraph is very important. Often it is an overarching statement of the position. Specific details, such as references to legislation or technology, must be avoided in a position statement, since they could limit League advocacy in unknown future situations.

Position Adoption by the LWVUS Board

After receiving the recommendations of the Study Committee or the Member Agreement Committee, the Education Fund Committee of the Board will review and then recommend to the full Board the new or updated League position. Publication will include an electronic notice to the membership and inclusion in the next edition of *Impact on Issues*. It may also include a press release to the public