

Overview of the LWVME Study Process

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Introduction

This document draws on information from the LWVUS website relating to national League studies¹ and policy positions and adapts that information to the state level, focusing on past study experiences in Maine. The objective is to provide background information about the LWV study process for members of LWVME who are planning to work on state-level League studies.

Why does the League do studies?

League advocacy is based on member study and agreement on selected issues and involves concerted efforts on specific public policy proposals consistent with League positions. League lobbying supports or opposes specific pieces of legislation based on established positions reflecting member understanding and agreement. The LWVUS public policy positions are the official statements of position for each program area adopted at the most recent national Convention. Program areas include:

- Representative Government
- International Relations
- Natural Resources
- Social Policy

At the National level, these positions are recorded in “Impact on Issues” available online at LWV.org.² While State and Local units may establish their own advocacy priorities, they are expected to advocate in concert with these national positions. State and Local Leagues may not advocate positions contrary to these national ones.

States and local units within states can also develop policy positions that deal with issues of local relevance that are not covered by LWVUS position statements. These State/Local positions are developed using the LWVUS study process, but applied at the State/Local level. The RCV study (2008-2011)³ and the more recent Political Primary study (2017-2018)⁴ are examples of LWVME studies.

LWVME has its own “Impact on Issues” document,⁵ also available online. In Maine, the principle program areas covered in the document are:

- Campaign Finance and Campaign Finance Reform

¹ See <https://www.lwv.org/league-management/other-issues-tools/guidelines-lwvus-studies> .

² See https://www.lwv.org/sites/default/files/2018-05/impact_on_issues_2016-2018.pdf .

³ See http://www.lwvme.org/RCV_Timeline.html .

⁴ See http://www.lwvme.org/primary_study.html .

⁵ See http://www.lwvme.org/files/Impact_on_Issues.pdf .

- Voting Rights
- Election Methods and Administration
- Ethics and Disclosure
- Good Government

Study Committee members should be familiar with these two documents as they provide examples of current position statements and League efforts to translate positions into concrete actions.

The process used in formulating positions and in taking action at the grassroots level makes the League unique and sets the League apart from other organizations. The fact that we are members not only of a local League, but of a state League and the League of Women Voters of the United States as well, makes us a powerful force.

Components of the LWVME Study Process

STUDY SCOPE, TIMELINE, AND CONSENSUS/CONCURRENCE CRITERIA

The State Board will adopt a Study Scope, propose a Study Timeline, and develop Consensus or Concurrence Criteria for each study based on the action and intent of Convention to update a previous study or to initiate a new one. Examples of criteria to consider include a minimum number of units participating and some diversity of units, including geographical distribution and size.

Prior to beginning a study, the Board has traditionally chosen whether to follow a consensus or concurrence process. More recently, Study Committee members have assisted with the consensus vs concurrence decision after conducting some initial research on the issue.

- A Concurrence study is based on a study done or policy adopted by another state chapter. Study materials may be adapted from the original study, and the study question is a vote on whether or not to adopt the policy developed by the other chapter.⁶
- A Consensus study starts from scratch. If neither LWVUS nor any other chapter has an official position on a topic, a Consensus study must be conducted to formulate new policy. The goal is for the new position to reflect the views of as broad a portion of the membership as possible.⁷

During the early stages of the study, the Study Committee may recommend to the Board revisions in the Scope, Timeline, or Criteria based on information obtained during the study process.

APPOINTMENT OF STUDY COMMITTEE CHAIR

The LWVME President appoints a Chair of the study committee, sometimes/often a Board member. Co-Chairs could also be appointed. If the Chair is not a Board member, the President may appoint one or two Board members to the study committee.

⁶ For example, the LWVME developed their RCV position from a concurrence study that concurred with an earlier Minnesota League study on the same topic.

⁷ Although the recent LWVME Political Primary Study began as a concurrence study, the study team was unable to identify a study by another State with which it could concur. Consequently, the Primary Study became a full consensus study.

APPOINTMENT OF STUDY COMMITTEE MEMBERS

The LWVME Study Chair announces the study scope and invites members to apply for the study committee. The appointed Study Committee should be as neutral or as balanced as possible with members representing all sides of the study issue.

The LWVME selection process is less formal than that for national studies.⁸ The Maine Board and/or Study Chair requests volunteers and generally accepts all volunteers unless the size of the committee becomes unwieldy or unless a volunteer has a clear interest in driving the process to a particular outcome. If there are too many volunteers, preference goes to those with past study experience, demonstrated interest in the topic, and adequate time to devote to the study. The Board/Study Chair also consider the complementary skills among volunteers when making choices.

CONDUCTING THE STUDY

Development of Study Management Plan

The LWVME Study Chair(s) will report to the State Board or its designated Study Manager. Communication between the LWVME Study Committee Chair(s) and the Board will be ongoing, with feedback loops at every stage of the process to facilitate identification and solution of any problems.

Meetings

The Study Committee meets periodically via audio or video conference call or in-person as is cost effective to conduct the study. At least one in-person meeting is ideal.

The Study Chair presents a preliminary set of study tasks at the initial Study Committee meeting and works with committee members to develop the task list further and to assign tasks to members, taking into account the skills, experience, and availability of all. The first meeting also establishes a calendar of meeting times/dates. The calendar and assignments may be refined as the study progresses to ensure that everyone has a clear sense of their assignments at all stages of the study and that the committee adheres to the overall study timeline.

At each meeting, a committee member is designated to keep a brief, written summary of the meeting to share with other committee members and the State Board. Electronic versions of all meeting notes will be filed in a folder accessible to all committee members.

Subcommittees

The Study Committee may divide itself into as many subcommittees as necessary to conduct the study and oversee its implementation.

PREPARATION OF DOCUMENTS

Study Documents and Distribution

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 accessible online. Study materials may include articles, pro and con statements, data, Internet references, multimedia files,

⁸ Members who volunteer for national studies must complete a questionnaire and submit a résumé, and names of three references, at least one of whom must be their local or state League President. Preference will be given to applicants who have actively participated on a local or state League study committee.

etc., with the purpose of making a thorough and balanced presentation of all issues of the study and preparing League members for the consensus or concurrence process.

Leaders' Guide

The Study Committee will prepare a Leaders' Guide, which is a study-specific guide to help local units conduct consensus or concurrence meetings on the study topic. The guide may include an outline of the study, study scope, study timeline, advice for local unit boards, a guide for discussion leaders, tips for consensus or concurrence meetings, the consensus or concurrence questions, and clear pointers or links from the questions to the study materials.

Depending on the complexity of the study and study materials, the Study Committee may decide to develop a single document combining the study materials and Leaders' Guide.⁹

Local Unit Study Groups

Local units may form study groups and begin working on the topic prior to the distribution of finalized study materials and the Leaders' Guide. The Study Committee will facilitate the formation of local study groups by providing recommendations for background materials shortly after the study begins. Local units may also host public education events on the study topic for the purpose of educating members of the League and members of the community about the issues under study.

Media Formats and Channels

Together with study documents and the Leaders' Guide, the Study Committee may also prepare or select other media such as PowerPoint presentations, videos, webinars, etc., that may also aid in the presentation of the study ideas and issues. An email discussion list, forum, or Facebook group can also be setup to support members involved with the study and provide a forum for exchanging ideas. All materials should be readily available on the LWVME.org website.

CONSENSUS OR CONCURRENCE

Consensus Questions

If a consensus process has been agreed to, the Study Committee proposes consensus questions 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 may want to allow time for some negotiation or for the Board to consider the questions more than once.

Consensus questions should directly ask members and Leagues about all the important issues in the study, so that the answers may directly lead to a statement of position. The questions should certainly allow for discussion during Consensus Meetings, but ambiguity should be avoided. Each consensus question must be framed so that it is neutral and not leading. Each consensus question should be limited to one topic or idea to ensure that no confusion exists as to the intent of the answer. Each consensus question should allow for both discrete answers that can be easily tallied and written answers where Leagues may explain their answers, the degree to which consensus was reached, or any difficulties that they encountered in their consensus meetings.

Consensus questions are similar to opinion surveys, so the Study Committee might well consult with volunteer opinion polling experts about the effectiveness of the questions. The Consensus questions

⁹ See, for example, the Study Guide for the 2018 Primary Study: http://www.lwvme.org/files/Primary_Study_Guide.pdf.

should also be tested with small focus groups of members who are not members of the Study Committee. It is important to plan time for this into the original schedule.

Concurrence Statement

If a concurrence process has been agreed to, the Study Committee proposes a concurrence statement to the Board. A concurrence statement is a proposed statement of position, based on the study materials, on which Leagues or members may only agree or disagree. Because the wording may be adopted as a final position statement, the Study Committee should consider the guidelines below for writing a statement of position. The proposed concurrence statement should then be submitted to the Board, the same as for consensus questions above.

Consensus or Concurrence Meetings

All local units are encouraged to participate in state studies, to form a local study committee, to hold general meetings for members and the public about the study, to hold consensus or concurrence meetings for members, and to report the results by the specified deadline.

Consensus "... is not a simple majority, nor is it unanimity; rather it is the overall sense of the group as expressed through the exchange of ideas and opinions, whether in a meeting of the full membership or a series of smaller discussion meetings." (*League Basics*, 2010).

The Study Committee may also propose a way to engage members-at-large in the consensus or concurrence process.

Consensus or Concurrence Meeting Reports

The Study Committee will prepare and require all units to use an electronic survey form to enter their consensus or concurrence meeting reports. The Board or the Study Committee will also set a deadline for submission of meeting reports.

MEMBER AGREEMENT AND POSITION ADOPTION

Determination of Consensus

If a consensus process was used for the study, the Study Committee reviews consensus meeting reports and the consensus criteria adopted by the Board to decide if consensus has been reached.

Consensus is defined as agreement by a substantial majority. Criteria include a minimum number of units participating and some diversity of units, including geographical distribution and size.

If consensus is reached, the Study Committee writes a draft position statement and proposes it to the Board.

Guidelines for Writing Position Statements

Many League positions are retained for decades; they should be worded generally and flexibly so that they can be used in a variety of advocacy situations. Specific details, such as references to legislation or technology, should be avoided, since they could limit League advocacy in future situations.

Position Adoption

After receiving the recommendations of the Study Committee, the State Board reviews the draft of the new or updated League position, discusses revisions with the Study Committee, when necessary, and

approves the final version of the position statement. New positions adopted at the state level apply only to the state having conducted the study.

Because Board/Committee agreement is a critical task, the Study Committee should allow enough time for some negotiation or for the Board to consider the new or updated position more than once.

Publication will include an electronic notice to the membership and inclusion in the next edition of *Maine’s Impact on Issues*. It may also include a press release to the public.

Study materials and resulting position statements can also be shared with other Leagues by posting them to the League’s Document Clearing House.¹⁰

Generic Study Timeline

Time Required	Action
1 month	Board approves initial study scope, timeline and consensus or concurrence criteria (usually at Convention).
1 month	Study chair appointed, committee members selected.
1 month	Study committee begins meeting, reviews study scope and timeline and may recommend changes to Board.
Several months	Study committee prepares or selects study materials and posts on website.
Several months	Local Leagues may form study committees, examine study materials, hold public meetings, etc.
1 or 2 months	Study committee proposes consensus or concurrence questions to the Board for revision and/or approval; Leaders’ Guide is finalized and includes approved questions.
1-2 months	Local Leagues hold consensus or concurrence meetings and submit report by established reporting date.
1 month	The study committee decides if consensus or concurrence was reached, and if so, proposes a new position statement to the Board.
1 or 2 months	New position is circulated to membership, adopted by the board and later by Convention delegates.

¹⁰ See <https://sites.google.com/a/leagueofwomenvoters.org/clearinghouse/home> .

