

The Democratic Party of Oregon

OFFICERS GUIDEBOOK



Information and Resources for
Local Democratic Party of Oregon Leaders



DEMOCRATIC
PARTY *of*
OREGON

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Section 1: Frequently Asked Questions

Here is a quick summary of the questions often asked by newly elected party officers. These answers are meant as a starting point. You'll find more in-depth information on these topics in the pages of this guidebook.

How is the Democratic Party of Oregon structured?

The Democratic Party of Oregon (DPO) is a grassroots party wherein Precinct Committee Persons in each county elect Delegates and Alternates to serve on the Congressional District Committees (5) and the State Central Committee. The Delegates to the State Central Committee are proportionally allocated based off voter registration data in each county, with 1 delegate representing each special group caucus, and 1 delegate representing each Congressional District Committee. Each Congressional District Committee sends delegates to each of the DPO's Standing Committees who serve to advise the State Central Committee and carry out its tasks across the State. A full organizational chart is available on pages 6 and 7.

Guide to the Guidebook:

- DPO (Democratic Party of Oregon)
- PCP (Precinct Committee Person)
- SCC (State Central Committee)
- CD (Congressional District)
- Organization (County Party, Caucus, or CD)

What are the Officers' duties?

Each organization within the Democratic Party of Oregon maintains their own bylaws which may vary or dictate specific duties. The below is a general guide, that may be overruled by your bylaws.

CHAIR

Convenes and presides at meetings of the organization. The Chair attends meetings of the State and Congressional District Committees and performs all other duties connected to the office.

VICE CHAIR

Presides, in the absence of the Chair, at meetings. A further duty is to assist the Chair in the discharge of the Chair's duties, and to attend meetings of the State and Congressional District Committees.

SECRETARY

Preserves the minutes and attendance records of all Executive and Central Committee proceedings. Directed by the Chair, the Secretary notifies Executive and Central Committee members of meetings. The Secretary performs all other duties usually connected to the office of Secretary (e.g., updating the event calendar, maintaining organization rosters, etc.) The Secretary is also responsible for reporting changes in leadership or delegation to the Democratic Party of Oregon Operations Director.

TREASURER

Takes responsibility for funds and makes no disbursement without authority or ratification by the Executive Committee or Chair. The Treasurer keeps accurate records of donations and expenditures and is responsible for timely reporting to the Oregon Secretary of State in compliance with its rules.

STATE CENTRAL COMMITTEE (SCC) MEMBER/ALTERNATE

Members are expected to attend quarterly meetings to conduct party business including budget approval, resolutions, amendments to bylaws and state officer elections, among other things.



Section 1: Frequently Asked Questions

Alternates are encouraged to attend all SCC meetings and can vote when upgraded to replace an absent delegate from their County, CD, or Caucus.

CONGRESSIONAL DISTRICT (CD) COMMITTEE MEMBER/ALTERNATE

Members are expected to attend meetings to conduct party business. Members of the Congressional District (CD) Committees liaise with their Congressional Representatives and elect members to serve on the Democratic Party of Oregon Standing Committees. Alternates are encouraged to attend all meetings and can vote when upgraded to replace an absent delegate for their CD.

What does the County Central Committee do?

The Central Committee is the governing body of the County Democratic Party and is responsible for all County Party business, including filling officer vacancies, approving expenditures, electing delegates to the State Central Committee and Congressional District Committee(s), and recruiting volunteers and organizing events.

After the County Party Reorganization, what should the Chair and Vice Chair do first?

- Welcome other officers, SCC Members/Alternates and precinct committee persons (PCPs) by mail, email, and/or phone.
- Hold an orientation event and training session for PCPs as soon as possible.
- For county officers needing Voter File access, send account requests via email to the DPO Technology Director at it@dpo.org.

After the County Party Reorganization, what should the Secretary do first?

- Create and maintain complete rosters of County Central Committee, Executive Committee, Congressional District Committee, and State Central Committee Members. Submit a complete report of the rosters including contact information (phone, email, mailing address) to the DPO Operations Director.
- Establish and distribute the schedule for all Central Committee and Executive Committee meetings.
- Post all event/meeting dates and details on the DPO events calendar at www.DPO.org.
- Send timely meeting notices, with agendas and other details.

After the County Party Reorganization, what should the Treasurer do first?

- If the Chair and/or Treasurer are new, they should both go to their bank to change the signatories on the organization's bank account (County Parties).
- Submit an updated Statement of Organization form to the Oregon Secretary of State if the Chair and/or Treasurer are new.
- Download and read the Campaign Finance Manual from the Oregon Secretary of State at sos.oregon.gov.
- Review training videos and seek other assistance from the SOS regarding the use of its reporting software (Orestar), etc.

What are the Precinct Committee Persons' duties?

The Precinct Committee Person (PCP) is charged with organizing the Democratic Party in the precinct and are the voting body of the County Central Committee. PCPs are elected on



the May Primary ballot in even-numbered years, but can be appointed by the County Central Committee in the interim.

PCPs play a critical role in reaching out to Democratic voters, recruiting volunteers and supporting campaign activities, including:

- Canvassing precinct residents to identify and keep record of likely Democratic voters.
- Identifying Democratic 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 slate cards and campaign literature for endorsed candidates.
- Joining the Neighborhood Leader Program or other county volunteer efforts.
- Assisting with get-out-the-vote efforts at election time.
- In the event of a vacancy in elected office or on the ballot for partisan office, a convention of PCPs will fill appropriate vacancies.

Is there a limit on the amount of money a County Party can raise?

There is no limit on the amount, but certain types of contributions are prohibited, such as:

- Anonymous contributions
- Contributions in a false name
- Contributions from foreign nationals

If you have any questions about contributions, always refer to the Campaign Finance Manual produced by the Oregon Secretary of State.

Are there limits on donations from County Party organizations to campaigns?

There are not limits to State Candidates. There are limits to Federal Candidates. There may be limits to Local Candidates. If you have any questions about state and local candidate contributions, refer to the Campaign Finance Manual produced by the Oregon Secretary of State. The rules for contributions to federal campaigns (U.S. Senate or House, for example) are set by the Federal Election Commission. If your party organization is interested in contributing to candidates for federal office please consult with the DPO Executive Director or Compliance Director.

What are the Democratic Party of Oregon Governing Documents?

BYLAWS & STANDING RULES

The Bylaws and Standing Rules of the Democratic Party of Oregon provides the foundational rules and operating procedures for Party activities. These documents are subject to amendment and approval by the State Central Committee.

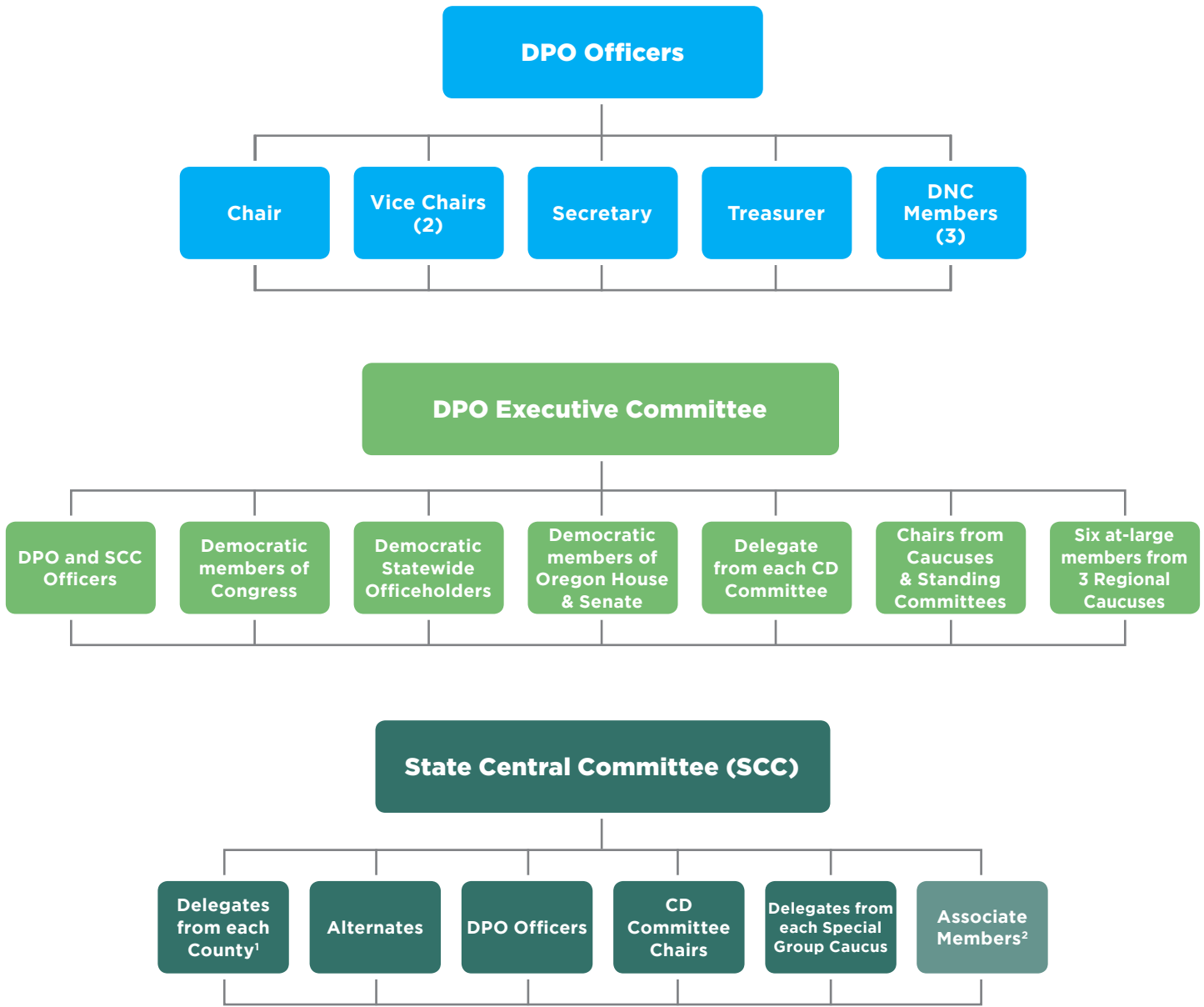
THE DPO PLATFORM AND LEGISLATIVE ACTION ITEMS

The DPO Platform states the beliefs and principles of the Democratic Party of Oregon. The Legislative Action Items include specific legislative and policy priorities for a two-year period. These documents are both produced at the biennial DPO Platform Convention event, which contains representatives from each of the 36 County Parties as well as the Oregon Legislative Assembly.



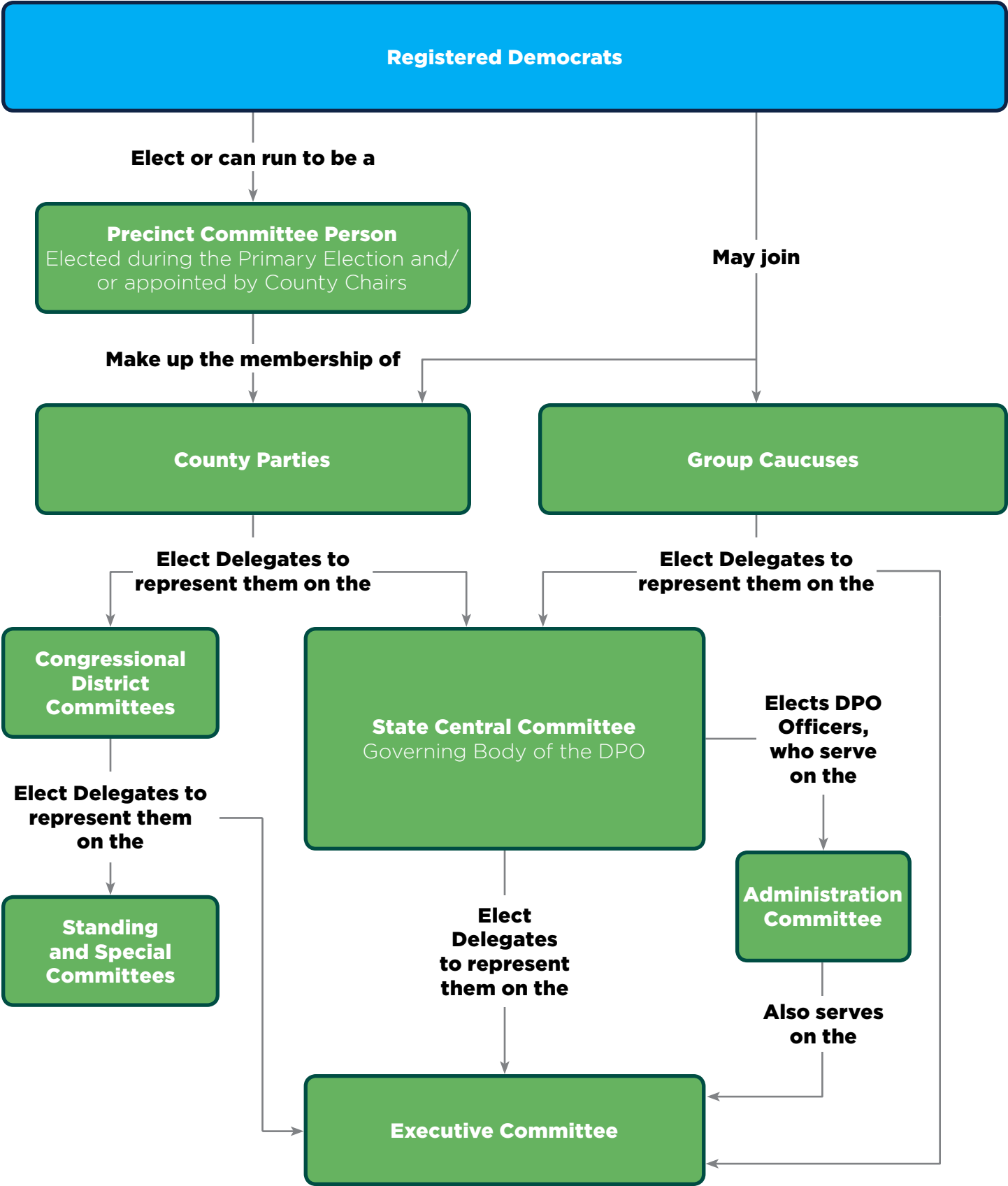
Section 2: Democratic Party of Oregon Structure

The membership of the DPO State Party Officers is detailed in Article V, Section 1. The membership of the Democratic Party of Oregon Executive Committee is detailed in Article XII, Section 2 of the DPO Bylaws. The membership of the Democratic Party of Oregon State Central Committee (SEC) is detailed in Article IV, Section 1 of the DPO Bylaws.



1. County SCC Members are comprised of at least two delegates elected from each county and an additional delegate for each 15,000 registered Democrats or major fraction of 15,000 Democrats within the county on the date of the primary election as provided by law. Members also include DPO officers, chairs of the congressional district committees and a delegate from each special group caucus in compliance with Article XV of these bylaws.

2. Democratic members of the Oregon Legislative Assembly, members of the SCC Executive Committee, alternates to the SCC, and members of SCC Standing Committees are Associate Members. Unless they are otherwise entitled to vote, they are not counted in a quorum for a SCC meeting, and are not eligible to vote on business brought before the SCC.



Section 2: Democratic Party of Oregon Structure

Party Organization

The Democratic Party of Oregon is divided into five basic levels: County Parties (County Central Committees), Congressional District Committees, Special Group Caucuses, Standing Committees, and the State Central Committee.

County Parties

The County Party, or County Central Committee, is made up of all Precinct Committee Persons within that county.

The rules and statutes regulating County Central Committees are found in ORS 248 and the Democratic Party of Oregon Bylaws and are as follows (as of 1/18/2019):

Oregon Revised Statutes:

248.031 Precinct committee persons as county central committee; status and functions of committee. The precinct committee persons of the county shall constitute the county central committee of their party. The county central committee of each major political party is the highest party authority in county party matters and may adopt rules or resolutions for any matter of party government within the county which is not controlled by the laws of this state.

248.033 Organizational meeting; notice.

1. The organizational meeting of a county central committee shall be held no less frequently than every 25 months.
2. The retiring county central committee shall prepare a written notice designating the time, date and place of the meeting and file a copy of the notice with the county clerk not later than the 40th day before the date of the meeting. The retiring county central committee also shall mail a copy of the notice to the state central committee.
3. Upon request of a county central committee, the county clerk shall provide the county central committee, without charge, a list of the names, addresses and other contact information, including electronic mail addresses or telephone numbers, of persons holding the office of precinct committee person for that major political party on the date the clerk receives notice of an organizational meeting under subsection (2) of this section.
4. The chairperson of the retiring county central committee shall mail a copy of the notice of the time, date and place of the meeting, not later than the 10th day before the

meeting, to each member of the county central committee. If permitted by the bylaws of the county central committee, the county central committee may notify members by means other than by mail.

248.035 Transfer of property; election of officers; notice of election; eligibility to vote.

1. At the organizational meeting of a county central committee:
 - a. The officers of the retiring county central committee shall make available to the committee the property, records and funds owned or controlled by the retiring committee.
 - b. The committee next shall elect a chairperson, vice chairperson and other officers the committee considers necessary. The persons elected to the offices need not be members of the county central committee. The committee shall determine the term of each office. Only a newly elected precinct committee person may vote on the election of committee officers.
2. The elected chairperson, within 48 hours of the chairperson's election, shall send a list of the officers of the committee to the county clerk and to the state central committee.
3. Only a newly elected precinct committee person or a person appointed or selected to fill a vacancy in the office of committee person may vote to fill a vacancy in a committee office. Immediately before a meeting of the county central committee at which there may be an election to fill a vacancy in a committee office, the chairperson shall obtain from the county clerk a list of committee members. The list shall determine the eligibility of a committeeperson to vote to fill a vacancy in a committee office.

248.043 Procedure if meeting not called; filling vacancies when no precinct committeeperson elected; term of appointee; notice to county clerk.

If a newly elected county central committee fails to meet or to organize or if no person within a county is elected by a major political party as a precinct committeeperson, the chairperson of the retiring state central committee shall appoint a temporary chairperson of the county central committee. The temporary chairperson shall call an organizational meeting and organize the committee as provided by applicable provisions of ORS 248.033 and 248.035. A temporary chairperson appointed when no precinct committee person is elected may appoint members to fill the vacancies in the office of committee person for the precinct in

which the persons are registered. A person so appointed may be removed from office at the pleasure of the central committee, but otherwise shall hold the office of committeeperson for the unexpired term and shall have the powers, duties and privileges of a committeeperson. When a person is appointed to the office of committeeperson pursuant to this subsection, the temporary chairperson shall notify, in writing, the county clerk of the appointment. The county clerk shall place the name of the person appointed on the list of committee persons.

248.045 Proxies prohibited; bylaws or rules; executive committee functions; voting privileges. Proxies in no instance shall be permitted to participate at any county central committee meeting. At any meeting of the county central committee, the committee may:

1. Adopt, amend or repeal bylaws or rules for the government of the political party in the county.
2. By the adoption of bylaws or of a resolution, select an executive committee and authorize the executive committee to exercise those powers delegated to it by the central committee including, but not limited to, the power to fill a vacancy in the office of committeeperson pursuant to ORS 248.026. In no event may the central committee delegate, or the executive committee exercise, the power to elect a person to, or fill a vacancy in a committee office. The persons selected as the executive committee need not be members of the county central committee.
3. Except as provided by ORS 248.035 (3), grant participation and voting privileges to a:
 - a. Person who holds a public office or an office of a political party.
 - b. Person who has been nominated for a public office at the preceding primary election.
 - c. Member of the executive committee of the county central committee.

Democratic Party of Oregon Bylaws:

ARTICLE X - COUNTY CENTRAL COMMITTEES

Section 1 – Organization - Each county central committee must reorganize within 25 months of its previous organizational meeting, as required by state law. The sitting County Chair calls the meeting. If the sitting County Chair fails to call the organizational meeting within the time the county bylaws

require, the State Chair calls the meeting. County central committees are strongly encouraged to take the wide diversity of their counties into consideration when organizing.

Section 2 – County central committees may combine with other county central committees to organize with the consent of each involved county central committee and the SCC. Counties deciding to combine may elect a single set of officers.

- a. The combined counties will not lose representation in the SCC.
- b. Delegates and alternates may be elected from the combined counties, as long as a majority of the precinct committee people from each of the combined counties agrees.



Section 2: Democratic Party of Oregon Structure

Congressional District Committees

Congressional District Committees are a part of the Democratic Party of Oregon and have no unique status in Oregon Statute. Congressional District Committees are defined as follows in the Democratic Party of Oregon Bylaws.

ARTICLE IX - CONGRESSIONAL DISTRICT COMMITTEES

Section 1 - Membership - Members of the Congressional District Committees include at least two delegates from each county within the Congressional District and one delegate for each 15,000 Democrats or major fraction of 15,000 Democrats within the county and the Congressional District as of the primary election. County Congressional District delegate and alternate delegate positions shall be elected by a process that recognizes three gender categories: female, male and non-binary, and that assures that no gender category shall have greater representation than 50 percent or, in the case of an odd number, 50 percent plus one. Non-binary delegate positions shall reduce the male and female delegate positions as evenly as possible. Replacement preference for alternate delegates will utilize gender category first. Counties are strongly encouraged to consider the wide diversity of their counties when selecting delegates.

Section 2 - Organizational Meeting - Each Congressional District Committee holds its organizational meeting not later than the first quarter of the year following a General Election. The sitting District Chair calls the organizational meeting by the end of the year of a General Election. If the sitting District Chair fails to call the organizational meeting by end of that year, the State Chair calls the meeting. Districts are strongly encouraged to consider the wide diversity of their District when selecting officers.

Section 3 - Duties

- A. At its organizational meeting or in its next official meeting, each Congressional District Committee and the SCC delegates and alternates acting as delegates living in that district, elects representatives to serve on the standing committees of the SCC. Gender, race, age, physical ability, sexual orientation and gender identity shall be given strong consideration in the election process.
- B. The chairs of the Congressional District Committees serve as Presidential Electors during a Presidential Election year. If the District Chair is unable to serve, the district committee's Vice Chair, Secretary, or Treasurer, in that order, serve as a Presidential Elector.



Standing Committees

Each Congressional District Committee, along with the SCC delegates and alternates acting as delegates living in that district, elects committee delegates and alternates to the standing committees in the following numbers:

Budget Committee:

- Prepares a two-year budget for the Democratic Party of Oregon for submission to the Executive Committee by the end of November of each odd-numbered year, and for the subsequent submission to the State Central Committee at its 4th quarter meeting;
- Makes all necessary reports to the State Central Committee.

Credentials Committee:

- Signs up members of the SCC and Executive Committee, designating delegates and alternates;
- Conducts elections for party officers with the assistance of DPO staff;
- Assists with members' registration for special events, and other duties as assigned.

Platform and Resolutions Committee:

- Recommends resolutions to the SCC;
- Submits a draft platform to the DPO's platform convention;
- Assures that proposed resolutions and platforms are submitted in accordance with the Bylaws and rules of the DPO;
- Recommends ballot measures to the SCC.

Rules Committee:

- Reviews the Bylaws regularly and recommends amendments;
- Proposes the rules and procedures for state conventions. Those rules and procedures are to be approved by the delegates of those conventions.
- Reviews the bylaws of prospective special group caucuses to ensure those bylaws meet the goals and Bylaws of the DPO. The committee may recommend approval of the caucus to the SCC.

Local Events and State Fair Committee:

- With the assistance of staff, operates the State Fair booth, and assists county central committees with operating booths at their county fairs;
- Assists county parties, congressional district parties, and caucuses at local events when asked;
- Performs the other functions that may be assigned by the SCC.

The Chair of the SCC appoints the chair, vice chair and one voting member of each standing committee. The chair of the standing committee may appoint one voting member of the standing committee, with approval of the Administration Committee.

Special Group Caucuses

The SCC may grant official recognition to a statewide caucus of Democrats sharing demographic or similar identity. Caucuses are meant to promote diversity and encourage people with similar interests to be active in supporting the Democratic Party.

All registered Democrats are able to participate in caucuses, though each caucus has bylaws defining their voting membership.

As of January 2019, the Democratic Party has 17 recognized special group caucuses. These caucuses are represented on the DPO Executive Committee and the State Central Committee.

State Central Committee

The DPO is empowered by state law, (ORS 248.002 – 248.012), and the Democratic National Committee Charter to manage its affairs and transact its business. The **State Central Committee** (SCC) is the governing body of the Party and it may delegate its authority. The Officers of the Democratic Party of Oregon make up the Administration Committee. These Officers consist of the Chair, two Vice Chairs, the Secretary, the Treasurer, and Oregon's three Democratic National Committee Members.

The State Central Committee is made up of delegates representing each of Oregon's 36 Counties, A representative from each Special Group Caucus, a representative from each Congressional District Committee, and the Administration Committee. The State Central Committee meets quarterly in counties across Oregon, and follows the rules and statutes of ORS 248 and the Democratic Party of Oregon Bylaws and Standing Rules.

Oregon Revised Statutes:

248.072 Authority of state central committee. The state central committee is the highest party authority in the state and may adopt rules or resolutions for any matter of party government which is not controlled by the laws of this state.

248.075 State central committee; organizational meeting; notice.

1. The state central committee shall consist of at least two delegates from each county central committee and other

Section 2: Democratic Party of Oregon Structure

delegates from each county equal to the number of party members in the county registered on the date of the primary election divided by 15,000. If the remaining number exceeds 7,500, one additional delegate shall represent the county. The delegates and an equal number of alternate delegates shall be selected by the county central committee. When a delegate of a county central committee is unable to attend a meeting of the state central committee, an alternate delegate of the county central committee may attend the meeting.

2. The organizational meeting of a newly elected state central committee shall be held on a date to be determined by party rule. The retiring state central committee shall mail notice of the meeting, not later than the sixth day before the meeting, to each member of the newly elected state central committee. If permitted by the bylaws of the state central committee, the state central committee may notify members by means other than by mail.
3. The chairperson of the retiring state central committee shall mail a notice of the meeting to the county central committees not later than the 45th day before the meeting. The state central committee may not reorganize without the mailing of this notification.
4. If a county central committee fails to organize before the organizational meeting of the state central committee, the appointed temporary chairperson of the county central committee may act as the sole delegate from that committee to the state central committee.
5. If the retiring state central committee does not mail notice of the organizational meeting under subsection (2) of this section, the meeting may be called by a petition signed by at least 19 chairpersons of the county central committees. The petition shall state the time, date and place of the organizational meeting. A copy of the petition shall be mailed to each newly elected chairperson and vice chairperson of the county central committees not later than the sixth day before the meeting. A copy of the petition shall be filed with the Secretary of State.

248.085 Transfer of property; election of officers; bylaws or rules; executive committee functions.

1. At the organizational meeting of the state central committee:
 - a. The officers of the retiring state central committee shall deliver to the newly elected committee the property, records and funds owned or controlled by the retiring committee.

- b. The committee shall elect a chairperson, vice chairperson and other officers the committee considers necessary. The persons elected to the offices need not be members of the state central committee. The committee shall determine the term of each office.
 - c. The committee shall adopt, amend or repeal bylaws or rules for the government of the state central committee.
2. At any meeting of the state central committee, the committee, by bylaw or resolution, may select an executive committee and delegate powers to it. The persons selected as the executive committee need not be members of the state central committee. In no event may the central committee delegate, or the executive committee exercise, the power to elect a person to fill a vacancy in state committee offices. However, the central committee may provide in its bylaws for the appointment by the executive committee of a temporary officer to fill a vacancy.

Headquarters

The Democratic Party of Oregon has a full-time office staffed by professionals in finance, communications, party affairs, training, data and targeting who assist Democratic Party of Oregon members at all levels. The state office is located at 232 NE 9th Avenue, Portland, Oregon 97232.

Democratic National Committee

The DPO is a part of the Democratic National Committee. Every four years, the Democratic National Committee holds a Convention to select its Presidential and Vice Presidential candidates. Oregon elects Delegates to the National Convention at Congressional District and State Conventions.

Governing Body

Between Democratic National Conventions, the governing body is the Democratic National Committee (DNC). Oregon is represented on the DNC by the state party Chair and Vice Chair and three 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.

Section 3: Officer Duties and Recommended Practices

Candidates for public office, whether statewide, congressional or legislative, will often say that the most important entity in the state party is the County Party. A good County Party that provides volunteer assistance can mean the difference between winning and losing. A Democratic candidate's campaign will usually rely heavily on the county for help in literature drops and door knocking, event planning, information gathering and communications.

Chair

The Chair leads the group (County Parties, Caucuses, or CDs) 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 decisions, particularly involving expenditures and other matters that may require a vote of the group.

General Responsibilities

- Call and lead meetings.
- Attend state and congressional district Central Committee meetings and other committees on which they serve.
- Outside the group, represent and speak on the group's behalf, without inserting personal remarks or biases.
- Manage and support the activities of other group officers.
- Delegate tasks as needed to other members of the group.
- Support and guide volunteers.
- Recruit, welcome, educate and involve new members.
- Lead development of a strategic plan for activities.
- Send password requests to Voter File Manager for anyone in the group needing Voter File access.

First Duties After Being Elected

- Welcome other new officers, State Central Committee members/Alternates, and members promptly and personally.
- Notify the state party of new officers, SCC delegates/alternates with relevant contact information as soon as possible.
- Stage an orientation event or training session for new officers, SCC delegates/alternates, and members as soon as possible.
- Propose schedule for group's meetings.
- Notify Oregon Secretary of State of new officers (County Parties Only).
- Change signatories on bank account (County Parties Only).
- Obtain records and relevant materials from previous officers.
- Send password requests to Voter File Manager/DPO for anyone in the group needing Voter File access.

Conducting a Successful Meeting

- Prepare in advance: create an agenda and discussion topics.
- Distribute agenda and discussion topics to committee members before scheduled meeting — the earlier the better.
- 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 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 PCP, is responsible for every precinct.
- Appoint committees to carry out group activities, for example: Finance and Fundraising (County Parties), 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 Neighborhood Leader Program.
- Meet with committees.
- Ensure each committee has sufficient members.
- Consult with members on their duties, plans and progress.
- Coordinate committee activities with other group activities.
- Ensure committees meet and report to the group regularly.
- Arrange regular group meetings.
- Give officers and members training and information on programs, campaigns and issues.
- Coordinate efforts and information between the county, congressional district and State party organizations.
- Develop a budget and fundraising timetable so the group and campaigns are properly financed.
- Recruit and encourage potential candidates for state legislature, county offices, city or township offices, and school board.

Outgoing Chair Duties

- Transfer materials, records, and equipment to the new Chair.
- Assist in changing bank account signatories (Counties Only).
- Notify vendors as needed of name changes.

Section 3: Officer Duties and Recommended Practices

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 group's activities.
- Serve as Outreach and Inclusion Officer if group does not provide for a separate one.
- Assist the Chair as desired by the Chair.
- Represent the group 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, members, State Central Committee members and alternates promptly and personally.
- Stage an orientation event or training session for members as soon as possible.
- Obtain records and relevant materials from previous officers.

Outgoing Vice Chair Duties

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

County Party/Caucus/ Congressional District Secretary

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

General Responsibilities

- Maintain rosters of group's 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 DPO Operations Director of any changes to the group's officers or State Central Committee membership.
- Send the DPO office a copy of a revised 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 group activities.
- Maintain event/meeting dates on website and submit

to the DPO calendar.

- Conduct group correspondence.

First Duties After Being Elected

- Create a complete roster of Central Committee, Executive Committee, and SCC members/alternates and submit to DPO.
- Distribute the schedule for 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.

County Party Treasurer

The Treasurer is, according to state law, the legal representative of the county party. The Treasurer is responsible for keeping strict financial records of contributions and expenditures and to submit those records in the required format to the Oregon Secretary of State (SoS) Elections Division. The Treasurer should become very familiar with the SoS Campaign Finance Manual and ORESTAR Manual.

General Responsibilities

- Deposit prudently and safeguard the local party organization'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 organization, according to its Bylaws and rules.
- Reconcile cash on hand with receipts and spending records.
- Prepare and submit timely reports to the Oregon Secretary of State Elections Division according to its rules.
- Report to each Central and Executive Committee meeting on the state of the treasury.
- Work with the county party committees that oversee budget and finances.
- The Campaign Finance Manual is one of the most important resources. The Elections Division is available and willing to answer questions and help train, as well.

First Duties After Being Elected

- Change the signatories on the party's bank account, accompanied by the Chair as needed.
- File a new Statement of Organization.

Outgoing Treasurer Duties

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

Section 4: Organization and Meetings

Winning elections and building a successful party 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 Plan

Gather the Committee and other interested people together to make a list of what the group is striving to achieve. Some goals of a County Party/Caucus/CD Committee 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 group activities
- Build a local Neighborhood Leader Program or similar outreach program
- Host social events and activities to build party unity and attract new people
- Update and maintain Voter File data
- Raise Democratic 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 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 Democratic Party. 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.
- Recognize success — acknowledging a volunteer's success is always appropriate and a good idea.

Section 4: Organization and Meetings

Tips for Leading Effective Meetings

The Basics

- Establish a schedule and location for regular meetings that people can easily remember, such as: Second Tuesdays of every month, 6 p.m., 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 Democratic Party, 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 Democrat?” 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) is 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 11 of this manual.



Section 5: Outreach and Inclusion

The current political climate offers an opportunity for local groups 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 Democratic leaders a chance to connect for party-building and upcoming campaigns.

Go Where They Are

Expecting people to find their way to the Democratic Party 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 group, 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 meeting, community celebration, campus rally, or concert, representatives of the group 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 relevant DPO Caucus 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 group 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 Democratic Party 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 group 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 for a community event, 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 Democratic Party 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.

Be Accessible

All meetings of Democratic Party groups should be held in spaces that are ADA accessible, and groups should be willing to make accommodations for people with disabilities. Some easy things groups can do to increase accessibility include, but are not limited to: having an RSVP process that allows folks to identify accommodations they require, using amplified sound consistently (even if you have a smaller group meeting), having all speakers state their names before they speak so that participants with visual limitations can easily follow debate. The DPO's Disability Justice Caucus has made a checklist of consideration for groups who are choosing meeting locations, and this is available to all leaders.

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 help new participants understand how tasks like stuffing envelopes, entering data into the Voter File or collating caucus materials all contribute to our success. Remember that help comes in all forms, so be open to what is offered, show respect and express gratitude.

Section 6: Fundraising and Budget

Every successful organization realistically estimates its financial needs in advance and builds a plan for raising necessary funds. In the Democratic Party of Oregon, County Parties, Caucuses and, if they desire, CDs, 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 group 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.

Fundraising

A group 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 organization when they know how the funds will be used and have confidence in the people running the organization.

When planning any fundraising activity, the County Party Treasurer should contact the Oregon Secretary of State 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.

Caucuses and CDs should work with DPO staff to ensure any fundraising efforts they pursue are compliant with DPO rules and State and Federal law.

Events

The best strategy for local fundraising events is to keep the cost to a minimum and the fun at the maximum. The ticket cost or suggested donation should at least double the cost per person. You can bring in extra money during the event by having someone do a fundraising pitch, having a raffle or auction, and by putting out donation envelopes in visible places.

Tips for keeping expenses low:

- Ask local businesses and volunteers to make in-kind contributions of food, drinks, decorations, raffle prizes, etc.
- Ask for non-profit discounts for everything you're renting or buying for the event
- Have guests buy their own beverages
- Follow venue rules and clean up properly so you don't lose any deposits

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

Direct Mail

This approach is quite expensive for a local party organization to use and unless the message is especially impactful, it is easy for the mail piece to be lost in the clutter and be cast aside.

A postcard promoting the activities of the local party unit and including the website URL where a donation can be made requires less postage than a letter, but design and printing costs are higher. A letter with a self-addressed return envelope or, better yet, a printed remittance envelope with space for the donor to fill in all necessary employment information, etc., may be somewhat less expensive to produce.

In any case, it is good practice to rent a post office box for the party unit, giving keys to the Treasurer and Chair, and then use this address for all correspondence and return mail — rather than a person's home address.





Email

A solicitation of donations by email is less expensive than direct mail and can reach a wider audience. Think about ways to make your emails stand out from other emails people may be receiving from Democratic organizations. Promote activities and initiatives in your area that would interest potential contributors and spur them to click on the link and donate!

Special Rules for Caucuses

As caucuses, their committee, and local chapters are a part of the state party, not independent organizations, the DPO Bylaws gives the Party the responsibility to set policies for the activities of Special Group Caucuses. Be sure to refer to Section 14 of this Guidebook for specific rules and policies that exist for caucuses.

Special Rules for Congressional District Committees

As CD Committees are a part of the state party, not independent organizations, the DPO Bylaws gives the Party the responsibility to set policies for the activities of Congressional District Committees. Be sure to refer to Section 15 of this Guidebook for specific rules and policies that exist for CDs.

The DPO Check for Democracy Grant

The Democratic Party of Oregon receives a portion of the funds collected through the Oregon Political Tax Credit, and distributes these funds to our county parties through the DPO

Check for Democracy Grant Program. Every even year we encourage our county parties to submit grant proposals for capacity-building projects to our Check for Democracy Grant Committee, which awards grants based on eligibility and merit. Over the last six years the average grant award was \$500.

DPO Budget

The two-year budget of the Democratic Party of Oregon is drafted by the Budget Committee and approved by the Administration Committee, Executive Committee, and the State Central Committee. The DPO Treasurer will review and give a report on the budget at each State Central Committee Meeting.

Major Fundraising Events

The Democratic Party of Oregon hosts several major fundraising events each cycle. Each year, the **Wayne Morse Gala** is held in Portland. This event has been held intermittently since the mid 1970s, but has been an annual event since 2010. The Democratic Party of Oregon also hosts a biennial conference called **The Oregon Summit** in Central Oregon, which we have been holding since 2001. The Oregon Summit features several days of panels and special guest speakers. These fundraising events also have opportunities for scholarships and volunteer opportunities to increase grassroots participation. Beginning in 2018, the DPO also now hosts the **Nan Wood Honeyman Dinner** in conjunction with our biennial Platform Convention.

Section 7: Communications

Our party's success depends in large part on Democrats spreading our message far and wide. If your group has a communications officer, make sure they have contacted the DPO's communications staff so they can be included on messaging emails and receive timely social media content. Party chairs and vice chairs are also welcome to be on the DPO Communications List, at their request.

County Party and Caucus Websites

The Democratic Party of Oregon offers website hosting services to County Parties and Caucuses, as well as support for County Parties and Caucuses to use bulk email services through VAN, and set up donation forms through NGP. While in the past the DPO has assisted with constructing websites through the Drupal platform, we now strongly encourage that County Parties and Caucuses build their own websites using user-friendly platforms like Squarespace or WordPress, and work with the DPO to connect it with the appropriate website domain. For assistance in setting up or updating your County Party's or Caucus' website, contact the DPO's Digital staff.

Media Requests

Your county may occasionally be asked for comment on any number of political issues. While you are often the best authority on issues of local concern, the DPO can provide messaging and advice on questions about the regional, state, or national political climate. The DPO can also respond directly to media questions, if requested by a county chapter. Whatever the circumstances, it is helpful for counties to alert the DPO when they receive press inquiries. Understanding what is newsworthy around the state helps the DPO better promote party priorities and programs.

Talking Points, etc.

The Democratic Party of Oregon proactively sends out talking points and messaging materials to help our party leaders and candidates communicate our message effectively. Communications staff is also available to help counties with special requests — from help submitting opinion pieces to your local paper, to research on specific issues or elected officials, to media coaching and practice interviews. If you would like talking points on a particular subject, please contact the DPO as we often can help you locate the appropriate materials either internally or through a partner organization.

Social Media

Being active on social media can substantially increase your local organization's overall presence in the area. You can set up your own Facebook, Twitter and Instagram accounts for free. Local organizations are encouraged to follow the DPO's social media accounts (see below) and repost / retweet our material. More often than not, we're happy to do the same with content that your local group is posting.

Be sure to follow us on social media!



Facebook

Facebook.com/ORDems



Twitter

Follow us @ORDems



Instagram

Follow us @OregonDems

Section 8: Voter File, VoteBuilder, VAN

The Voter File, VoteBuilder, VAN (Voter Activation Network) are all names for the Democratic Party of Oregon's Voter File. The Democratic Party of Oregon, in partnership with the DNC, maintains an online database of all the registered and potential voters in Oregon. 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 DPO Voter File is the primary resource for the Democratic Party of Oregon, County Parties, Caucuses, and Democratic campaigns for all voter contact activities (phone calls, door-knocking, mailings, textbanking, 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 County Parties, Caucuses, and Democratic campaigns to benefit from each others' efforts. If one campaign or party organization finds a bad phone number and marks it in the database, no one else will waste time calling a bad phone number. If one group collects new contact information to more efficiently contact a voter, all other groups benefit from that information. Additionally, when party organizations and political campaigns identify a new voter as a supporter (or as someone who is not a supporter of our causes) all other committees benefit from that information. With the Voter File, all campaigns can work together by sharing their voter IDs to better target their valuable resources.

Analysis

The voter file also plays an important role in examining information about voters and outreach efforts. Counts and crosstabs is a powerful tool to provide descriptive snapshots of voters using criteria like district, age, sex, party affiliation, or ethnicity (to name a few). You can view a summary of how many voters were contacted in a certain time period or location, and a detailed breakdown of the responses to a particular candidate question.

Access

To gain access to this resource, the County or Caucus Chair or their designee must request user accounts by submitting the first name, last name, and email address via email to: it@dpo.org.

- Please include the first and last name of the new user, their email address and desired level of access. County Chairs and Data Managers typically have the highest level of access.

- Users must have a demonstrable need for VAN access and are required to put all relevant voter and volunteer data back into the VAN for future elections.
- Individual local candidates for public office cannot use the county DPO VAN committee to campaign for themselves without approval from their county party. Local candidates who want voter file access must complete a voter file application with their county party. Their application will be reviewed and may be approved by the county Chair or other county party process. Fees for use of the voter file are set jointly by the DPO and the county party.
- An audit of existing users in your VAN committee is recommended. We are happy to make any users inactive who are no longer working with your county party.

Training

The DPO hosts voter file training webinars several times a year and can also make recordings of past trainings available to VAN users. For information on training (or if you have any questions about the voter file) email it@dpo.org.



Section 9: Conventions

The Democratic Party of Oregon holds several conventions in the four-year cycle. We also host special conventions in the instance of a legislative or candidate vacancy.

Regular Conventions

Platform Convention

Every other year the Democratic Party of Oregon hosts a Platform Convention where Delegates from each County can attend and weigh in on the Democratic Party of Oregon Platform and set our legislative priorities (which then become our Legislative Action Items) for the next two years. The Platform and Legislative Action Items can be found at www.dpo.org/platform and www.dpo.org/LAI. The only business of this convention is to draft our Platform and Legislative Action Items.

Delegate Nominating Convention

In presidential election years, the Democratic Party of Oregon hosts a series of Presidential Delegate Nominating Conventions. The rules for this process are determined each cycle by the Democratic National Committee and then honed in Oregon's Delegate Selection Plan. Oregon uses a proportional representation plan based on the results of our Vote-By-Mail primary. Typically we host a combination of District Level Conventions and a Statewide Convention. The only business of these conventions is to select our delegates, alternates, and standing committee members to the Democratic National Convention.

Nominating Conventions

In the event of a vacancy in partisan office, or in a candidate position after the primary, the Democratic Party of Oregon will work with the County parties within the district to host a nominating convention to fill that vacancy.

Precinct Committee Persons (both elected and appointed) who represent the district are able to participate in this convention as voters. This process is regulated by Oregon State Law, as well as the DPO's Bylaws and Standing Rules, and the DPO is responsible for making sure this convention is compliant with these regulations to ensure that the nominee chosen by the convention does not face any legal barriers.

In the event of a vacancy in your area, expect a call quickly from the DPO to your County Chair to set up a plan. If you hear of an impending vacancy in your area, contact operations@dpo.org right away.



The Democratic Party of Oregon is committed to training people at all levels of experience as local party leaders and campaign volunteers, building skills to lead successful party organization, promote Democratic values, attract new voters, support our candidates and win elections.

DPO Trainings

The DPO provides ongoing trainings for county party leaders, candidates, and local party and campaign volunteers, as stand-alone events, as part of our regularly scheduled State Central Committee weekend meetings, as webinars and conference calls, and as one-on-one tutorials.

DPO Monthly Conference Calls

Each month, the Democratic Party of Oregon hosts a Democratic Leaders Call where critical information on upcoming events and projects is shared. A monthly invitation is sent to each Chair and Vice Chair of our party organizations.

DPO Leadership Retreat

Each year the Democratic Party of Oregon will host a free two-day retreat for Chairs and Vice Chairs to cover leadership topics and information on running effective party organizations. **This retreat is supported by the Meredith Wood Smith Grassroots Leadership Institute.**

State Central Committee Training Sessions

On the Saturday preceding each State Central Committee meeting, trainings on topics such as Going From Red to Blue, Message Framing, Using Social Media, and more are offered to SCC members and all interested Democrats.

Local Elections Project

The DPO Local Elections Project hosts regular training to back county parties in their efforts to elect Democrats to local office. In-person and webinar trainings are held annually to help county parties recruit and support local candidates, and to help candidates and their teams run winning campaigns.

DPO Training Library

The DPO maintains a library of video recordings of our live trainings, with downloadable supporting hand-out materials, at www.dpo.org/private/training-materials (login: democrat; password: training). The videos are categorized by interest, and include trainings for county party leaders, Democratic candidates, and volunteers engaged in party-building and campaign activities. The library is updated regularly.

Train to Win Weekly Webinars

Weekly webinars offered by the Association of State Democratic Chairs, a branch of the DNC, are scheduled on Thursdays at 12 p.m. Online pre-registration is required for each session.



Section 11: Parliamentary Procedure at a Glance

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 adjourn	No	Yes	No	No	Majority
Take a break	I move to recess for...	No	Yes	No	Yes	Majority
Register a complaint	I rise to a question of personal privilege.	Yes	No	No	No	None
Close debate	I move the previous question.	No	Yes	No	No	2/3
Limit or extend debate	I move that debate be limited (or extended) to...	No	Yes	No	Yes	2/3
Postpone to a certain time	I move to postpone the motion to...	No	Yes	Yes	Yes	Majority
Modify wording of motion	I move to amend 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	Point of order	Yes	No	No	No	None
Appeal a ruling	I appeal the decision of the chair.	Yes	Yes	Varies	No	Majority
Suspend the rules	I move to suspend the rules for the purpose of...	No	Yes	No	No	2/3
Split a motion into two or more parts	I move to divide the question.	No	Yes	No	Yes	Majority
Demand a counted vote	Division	Yes	No	No	No	None
Question parliamentary procedure	Parliamentary inquiry	Yes	No	No	No	None
Request information	Point of information	Yes	No	No	No	None

Motions Classified According to Purpose

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

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 www.robertsrules.com.

Section 12: Campaigns and Candidates

Candidate Recruitment

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

School boards, town boards, city councils and commissions, and other special district positions are excellent proving grounds for future legislators and state leaders. Recruiting progressive candidates to run for local offices is key to building a “farm team” of candidates for future legislative and state races. These local offices have a direct impact on our daily lives — sometimes moreso than the marquee positions at the top of our ballots. Our local parties should consider supporting candidates for these positions that reflect and support our Democratic values.

Activism on a popular community issue or event is an important quality for a candidate. It can also help them bring 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
- 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 role in recruiting candidates is chiefly to identify people with potential and build a supportive relationship. Recruiting candidates for local county and city races falls primarily to the county party. It will likely require the involvement of recruiters from the House (FuturePAC) or Senate (Senate Democratic Leadership Fund — SDLF) to get a candidate’s commitment to run for a legislative race, but vital groundwork is laid by a local party that makes a long-term commitment to the process.

Candidates and the Party

Developing and maintaining positive working relations with Democratic elected office holders is a top priority for local party

officers. Often, there is very little problem in this area as the elected office holders value their local organizations. However, some choose to separate their own campaign organization from the party for a variety of reasons:

- They seek to maintain control over their own campaigns;
- They are at odds with members of the local party over key issues;
- They may have been in office long enough to not depend on the local party for donations, volunteers or other resources;
- 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.

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

Here are some tips for getting started on a strong footing:

- If there is more than one Democratic candidate seeking the same open seat or a seat held by a Republican, it is important that the party Chair and Vice Chair maintain impartiality throughout the process — and good practice for other officers to do the same.
- Provide frequent opportunities for Democratic candidates to meet with activists and other potential voters at local events, forums, or meetings. If possible, be prepared to present a substantial donation from the party to candidates. It is a powerful reinforcement of the County Party’s value to their campaigns.
- Encourage unsuccessful candidates and their volunteers to stay involved with a welcoming approach and positive suggestions.

Role of the Party in Campaigns

Local party leaders play a demanding role during an election year in campaigns of city, county, legislative and statewide candidates. The most effective officers focus on maintaining the County Party, recruiting volunteers and working with local candidates and the DPO Coordinated Campaign.

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. Generally speaking, if it involves money, in any form, from any source, received or expended by a County party, 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 county parties or caucuses are not the same as the rules for campaigns. There may be some crossover, but party 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 on the Oregon Secretary of State website. 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 SoS on an activity you have planned can prevent problems that could be costly later, if funds are collected or spent illegally, or reported incorrectly. Caucuses and Congressional District Committees are part of the DPO and are not separate legal entities, so all activity must be coordinated with the DPO.

Here is some additional information to keep in mind:

- Officers should never assume a party 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 SOS or the DPO to 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 DPO.
- It is illegal for a candidate or campaign to falsely claim an endorsement of any kind.
- County Parties may not serve as a conduit for “pass-through” contributions to any candidates. This is also known as “ear-marking” and is illegal under both state and federal law.

Building a strong and effective party organization takes time and requires officers to have a vision for the future, including but also beyond the current election cycle, and a plan for how to get there. Campaigns and candidates are often 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 County Party or Caucus to keep these dual efforts in sync.

The Local Elections Project

The DPO provides an annual seminar and candidate training project called the “Local Elections Project” to help local candidates with some basic tools in their campaigns. County Party Chairs will be contacted at the start of each year with details about this program by the DPO’s Political Organizing Coordinator.

The DPO Coordinated Campaign

A “coordinated campaign” is a concept approved in federal election law. It allows state parties to achieve combined electoral priorities of Democratic candidates by leveraging economies of scale for those campaign activities that all campaigns need, but not all campaigns can or should build on their own. Many state parties use this strategy and begin with the “top of the ticket” – a US Senate race or other high-profile statewide effort – and then include other statewide races, Congressional races, and state legislative efforts.

Rules that govern coordinated campaigns include:

- State campaign finance laws
- Federal election laws
- USPS (United States Postal Service) regulations

So what are those campaign activities that all campaigns need, but not all campaigns can or should build on their own?

- Building and running field mobilization efforts
- GOTV
- Mail Programs
- Voter Protection
- Opposition research and tracking
- Voter file management
- Statewide slate cards
- Compliance

The DPO has ongoing capacity to do some of each of these things within its operational budget. But during the Coordinated Campaign cycle, we need more and bigger efforts in all of the areas on this list to win critical races. The ability of the Coordinated Campaign to carry out these efforts is dependent on the ability of all the partner campaigns to raise resources and make them available to the coordinated effort. Therefore, strategies and investments must be decided collectively.

The Coordinated Campaign — through its partners and participants — raises a revenue stream separate from the DPO’s operational revenues. Revenues and expenditures are tracked separately from the operational budget adopted by the Budget Committee, the Executive Committee, and the SCC. A report on those revenues and expenditures are reported to the SCC after each election cycle.

The Coordinated Campaign hires organizers who often are assigned to do grassroots activities in communities around the state. Its success depends on the support of thousands of volunteers, often recruited through County Party efforts. County Party leaders are encouraged to work with Coordinated Campaign efforts for their mutual success as the program ramps up each election cycle — typically in the late spring or early summer of an election year.

Section 13: Prescription for a Healthy County Party

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

Organizational Structure and Meetings

- Meet regularly in non-election years, and monthly during election years.
- Try to 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 and invite them to be involved.
- 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 picnic. 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 activities and supporting candidates.
- Donate the maximum allowable amount to their candidates every year.



Communication

- Recruit tech-savvy volunteers (sometimes a great leadership opportunity for high school and college students) to manage the County Party website and/or 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.
- Have an active letter-writing campaign that collaborates on sending letters to local and statewide publications pro-actively or in response to letters written by political opponents.

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 “NAV/no data/unknown” to streamline future campaign efforts and reach all those prone to vote for Democratic 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 Democratic candidates and groups 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 county 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

- Look for and attend trainings that will increase the skills and success of your county party leaders and activists
- Train activists in techniques for canvassing by phone and at the doors.
- Ensure that officers, PCPs, and activists are well-versed in party rules and in Campaign Finance regulations.
- Offer orientation sessions for new PCPs.
- Provide training for volunteers doing VAN data entry.
- Train volunteers in procedures used at meetings for credentials, resolutions, etc.

General

- Take action to improve your group’s 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 meetings, better website, more letters-to-the-editor, etc.
- Encourage leadership by rotating responsibilities among the officers and other volunteers to keep everyone engaged, energized and ready to tackle new challenges and opportunities.

Section 14: Special Group Caucus Documents

Special Group Caucus Policies

Adopted May 7, 2013; Amended February 14, 2017

PURPOSE:

The purpose of granting official recognition to Special Group Caucuses (SGCs) is to enable them to participate in the policy decisions and outreach programs of the Democratic Party of Oregon (DPO).

Because caucuses, their committees and local chapters are a part of the state party, not independent organizations, the DPO By-laws gives the Party the responsibility to set policies for the activities of SGCs. The goal of these policies is to encourage caucuses to expand party membership and diversity while maintaining the principle that we win elections when we move forward together as one Democratic Party.

Every caucus officer should be familiar with the policies outlined in this document. This is a working document and we encourage feedback from caucus chairs.

RULES AND GUIDANCE

Caucus Bylaws:

Every Special Group Caucus Bylaws approved under Article XV of the DPO By-laws must contain the following language:

"The (name) Caucus will abide by Article XV (Special Caucuses) of the Democratic Party of Oregon By-laws and any additional policies as established by the DPO Executive Committee."

Once a caucus is established, the DPO Rules Committee or the DPO Administration Committee (Admin Committee) may require other changes in a caucus' bylaws.

Finance:

Budgeting and Planning:

Each SGC will prepare an annual budget of projected income — earned through voluntary dues and contributions — and projected expenditures. This budget will be submitted to the Admin Committee no later than 5 PM on the last day of the third quarter of the preceding year.

The DPO budget will include a base level of support for new and reactivated SGCs for the first year of operations. Ongoing SGCs are expected to support their own operations through fundraising.

Income:

Raising funds for the DPO is an important role of SGCs, and we encourage and appreciate SGC fundraising efforts.

But a word of warning: because SGCs are part of the DPO, any failure by SGCs to comply with federal or state campaign finance laws could subject the Party to costly fines, and reduce our ability to help Democrats win elections.

SGCs are governed by the same laws and regulations that govern the State Central Committee (SCC) and Admin Committee, and are charged by the DPO By-laws with complying with the regulations and financial requirements of the SCC. This also applies to committees, work groups, local caucuses, or any other aspects of SGCs.

Tracking Donations:

Funds that are identified as donations made through the efforts of a caucus will be tracked for the purpose of making expenditures for activities that advance the interests of the responsible caucus and the DPO.

Members of SGCs are encouraged to participate in the donor programs and fundraising events of the DPO. SGCs may wish to track these contributions for the purpose of demonstrating how many SGC members are participating in DPO donor programs, but **donations received through DPO donor programs and events are not "double-counted" as raised through the efforts of SGCs.**

Online Donations:

The DPO will identify one-time donations made through a SGC donation web page as made through the efforts of that caucus. Recurring donations will not be identified with the caucus.

Offline Donations:

All other donations accepted by a SGC on behalf of the DPO will be separately tracked by the SGC and reported to the DPO Compliance Officer upon delivery of the contribution to the DPO.

To meet federal campaign finance requirements, all such offline donations must be delivered to the DPO Compliance Officer no later than 6 days after the contribution is received.

SGC Treasurers are responsible for collecting the necessary reporting information from each donor and delivering it to the DPO Compliance Officer. The DPO Compliance Officer will provide training and reporting forms to each Caucus Treasurer.

Expenditures:

All expenditures of any amount must be approved by the DPO.

Here's the process: at least 30 days in advance of an expenditure, the SGC Treasurer will email a request for approval to the DPO Compliance Officer (compliance@dpo.org). The request for expenditure will be reviewed by the Admin Committee and then, on approval, be paid directly to the designated vendor or service provider.

The amount of an expenditure made on behalf of a caucus will be based on the amount of donations raised by a caucus and the requirements of the project.

SGC expenditures may be suspended if the Admin Committee determines that the Party's income may not meet operational expenses.

Events:

SGCs that wish to do an event must submit a plan and event budget to the designated DPO staff 60 days before the event. The cost of any needed DPO support for the event will be added to the budget and reimbursed to the DPO from event proceeds.

The SGC and the DPO staff will create an event "memorandum of understanding" to clarify the roles and expectations of the SGC and DPO staff.

Contributing to Candidates:

Because federal election law recognizes contributions by any element of the DPO — including SGCs — as contributions by the DPO, **SGCs may not directly contribute to a candidate's election.**

While SGCs may organize volunteers or promote "meet and greet" events to support a candidate, **SGCs may not make in-kind expenditures that benefit a candidate without prior approval of the Admin Committee.** In addition, an SGC may not make expenditures to host an event where the purpose is to raise funds for a candidate prior approval of both the Admin Committee and the candidate.

Caucus Communications:

SGCs have an important role to play in Party communications — they help to amplify the Party's message and make it more targeted and effective, and they also help to provide feedback to the Party from the communities they serve.

The goal of these communications policies is to ensure that the DPO and its SGCs are working hand-in-hand to promote the Party and help Democrats win. Of course, all SGC

communications must be consistent with the goals of the DPO and SGC By-laws.

Speaking for the Party:

Anyone who speaks to the press or releases a public communication on any issue connected to the Party, and who is known to be working with the Party in any position, including volunteer positions, **will be presumed (perhaps falsely) by the press and/or public to be speaking for the Party.**

That's why the DPO has specific policies about speaking and public communications that apply to all Party officers, staff, and volunteers, which must be followed at all times.

Under DPO By-laws the State Chair is the chief spokesperson for the Democratic Party of Oregon. The chair can and often does designate individuals to speak on behalf of the party, most frequently the Executive Director.

Before any other officer, staff member, or volunteer — including SGC spokespersons — may speak for the Democratic Party of Oregon, **the communication must be approved by the DPO Chair or Executive Director.**

This includes statements that are: made to the press or media; intended for public distribution; testimony before legislative bodies; for the purpose of influencing legislators, legislation or regulations; or for any similar purpose.

It also includes phone bank scripts — what you say in a phone bank is considered a public communication. Phone bank scripts must also be reviewed by the Compliance Officer.

Printed Materials:

To ensure compliance with federal campaign laws, SGCs must submit the following to designated DPO staff for approval 30 days prior to distribution or publication: flyers, bumper stickers, buttons or "swag," posters, or any other printed material.

Online Communications:

Because of the fast-moving and informal nature of the web and social media, it would be difficult and cumbersome for SGCs to get approval for each individual online communication. **So instead, we ask that SGC officers take responsibility for ensuring that all content sharing and posting on any website or social media site follows messaging guidelines provided by DPO staff.**

These messaging guidelines, which will be provided in a separate document, outline the basic story that the DPO is trying to tell to the public every day. We ask you to help us tell that story, with the knowledge and expectation that you will tell it in a way that is unique to your community.

Section 14: Special Group Caucus Documents

SGC officers are responsible for removing any posts or shares that do not follow the messaging guidelines or are not consistent with DPO or SGC By-laws.

In the case of a problem, the Executive Director may ask DPO staff to delete or edit a posting and/or suspend editing privileges to a web site or social media account and immediately notify the caucus chair so that an appropriate remedy can be found.

Websites:

We recognize the value of SGCs having a web presence to coordinate activities, attract new members, and raise funds. Because SGCs are part of the Party, it's important to have that presence hosted by the DPO so that it can be maintained by DPO staff and understood by the public as being recognized by the Party.

The DPO staff will create web pages for each SGC that allow the SGC to receive single (not recurring) contributions by credit card, add and edit content, sign up new members, communicate with SGC officers, post events, and blog.

As of this date — February 2013 — some SGCs have existing independent web sites. In those cases, once the DPO has provided web pages for the SGC that meets the present requirements of the existing web site, the independent site will be deactivated. In the meantime, designated DPO staff will have administrative privileges for all independent SGC web sites and no new independent SGC site will be created.

Facebook, Twitter and Other Social Media:

DPO staff will have administrative privileges for all SGC Facebook fan pages, and privileges to create and edit content shall be granted to the SGC. Ditto for Google + organization pages or any other social media sites where account control is based on privileges linked to personal accounts.

DPO staff will have the username and password for any Twitter account associated with the SGC, and for any other social media sites where account control is based on a single username and password.

Online Advertising:

All online advertising must go through the expenditure process (as outlined in "Expenditures," above), and the content of all advertising must be reviewed and approved by the Executive Director and the Compliance Director.

VAN/Votebuilder:

Designated DPO staff will grant VAN and "My Campaign" access to a Caucus officer and alternate after they have received training and signed an agreement regarding proper and authorized use of these tools.



Endorsements:

SGCs may endorse a Democratic candidate in an open contested primary or a candidate in a non-partisan primary. SGCs may not oppose an incumbent Democrat in a primary, or endorse a candidate who is not a Democrat in any partisan election.

A decision to endorse must be done in a deliberate manner. The endorsement process must be made clear to SGC members and all candidates considered for endorsement. That process should be detailed in SGC bylaws or by a rule adopted by the SGC's executive committee. All eligible members of the SGC must be notified according to the requirements of their bylaws, and given an opportunity to participate.

The SGC endorsement process may begin earlier, but shall not conclude until after the filing deadline for all candidates in that election cycle. If there is interest in endorsing a particular candidate, all Democratic candidates in that primary must be made aware that the SGC may endorse, and all Democratic candidates in that primary must have the opportunity to participate. If the SGC intends to interview a particular candidate, other Democratic candidates in that contest must have that opportunity as well.

An endorsed candidate is entitled to list that endorsement in campaign materials. Any SGC endorsement must state that it is an endorsement of the SGC and not the SCC or Democratic Party of Oregon as a whole, and the endorsement must require any candidate using it to make this clear. The endorsement must also require that endorsed candidate may only use SGC endorsements in a primary election.

SGCs may not endorse in a general election unless the DPO Admin Committee determines special circumstances exist that would benefit the Party as a whole.

However, SGCs may organize volunteers or events at any time to encourage support of Democratic candidates they have previously endorsed.

Legislative Action:

SGCs may support approved Legislative Action Items in the DPO Platform and advocate for issues approved by the SCC in the form of Resolutions. Any contact with a legislative body or public official is considered a public communication and must be approved by the Chair or the Executive Director (see "Speaking for the Party," above).

Meetings:

SGCs may meet at any free public venue. All meetings and events shall be submitted to the DPO web site calendar as soon as they are scheduled (go to www.dpo.org/events/calendar and click the "Add+" button). DPO staff will train and assist SGCs to increase membership and participation in meetings.

SGCs may not schedule meetings at DPO headquarters without prior approval from DPO Staff (operations@dpo.org).

SGCs are encouraged to use conference calls and online communication tools to promote participation by statewide membership.



Section 15: Congressional District Committee Documents

DPO Congressional District Committees Budget & Finance Policies

Adopted by the DPO Administration Committee March 27, 2018

PURPOSE:

The purpose of these policies are to lay out simple processes and procedures for DPO Congressional District Committees (CDCs) to propose and set a budget, raise funds and make expenditures within DPO financial systems.

RULES AND GUIDANCE

Finance:

Budgeting and Planning:

Each CDC may prepare an annual budget of projected income — earned through voluntary dues and contributions — and projected expenditures for approval by the DPO Admin Committee. If a CDC does not currently have an approved budget it may submit a proposed budget to the Admin Committee 30 days prior to an Admin Committee meeting for review and approval. If a CDC has a previously approved budget, the budget for a new fiscal year must be submitted to the Admin Committee no later than 5 p.m. on the last day of the third quarter of the preceding year.

The DPO budget covers pre-approved nominal costs for CDCs to rent spaces for their regular meetings.

Because CDCs are part of the DPO, any failure by CDCs to comply with federal or state campaign finance laws could subject the Party to costly fines, and reduce our ability to help Democrats win elections.

CDCs are governed by the same laws and regulations that govern the State Central Committee (SCC) and Admin Committee, and are charged by the DPO By-laws with complying with the regulations and financial requirements of the SCC. This also applies to committees, work groups, or any other aspects of CDCs.

Income:

Tracking Donations:

Funds that are identified as donations made through the efforts of a CDC will be tracked for the purpose of making expenditures for activities that advance the interests of the responsible CDC and the DPO.

Members of CDCs are encouraged to participate in the donor programs and fundraising events of the DPO. CDCs may wish to track these contributions for the purpose of demonstrating how many CDC members are participating in DPO donor programs, but **donations received through DPO donor programs and events are not "double-counted" as raised through the efforts of CDCs.**

Online Donations:

The DPO will identify one-time donations made through a CDC donation web page as made through the efforts of that CDC. Recurring donations will not be identified with the CDC.

Offline Donations:

All other donations accepted by a CDC on behalf of the DPO will be separately tracked by the CDC and reported to the DPO Compliance Officer upon delivery of the contribution to the DPO.

To meet federal campaign finance requirements, all such offline donations must be delivered to the DPO Compliance Officer no later than 6 days after the contribution is received.

CDC Treasurers are responsible for collecting the necessary reporting information from each donor and delivering it to the DPO Compliance Officer. The DPO Compliance Officer will provide training and reporting forms to each CDC Treasurer.



Expenditures:

All expenditures of any amount must be approved by the DPO.

Here's the process: at least 30 days in advance of an expenditure, the CDC Treasurer will email a request for approval to the DPO Executive Director (director@dpo.org) and DPO Compliance Officer (compliance@dpo.org). The request for expenditure will be reviewed by the Admin Committee and then, on approval, be paid directly to the designated vendor or service provider.

The amount of an expenditure made on behalf of a CDC will be based on the amount of donations raised by a CDC and the requirements of the project.

CDC expenditures may be suspended if the Admin Committee determines that the CDC or DPO's income may not meet operational expenses.

Events:

CDCs that wish to do an event must submit a plan and event budget to the designated DPO staff 60 days before the event. The cost of any needed DPO support for the event will be added to the budget and reimbursed to the DPO from event proceeds.

The CDC and the DPO staff will create an event "memorandum of understanding" to clarify the roles and expectations of the CDC and DPO staff.

Contributing to Candidates:

Because federal election law recognizes contributions by any element of the DPO — including CDCs — as contributions by the DPO, CDCs may not directly contribute to a candidate's election.

While CDCs may organize volunteers or promote "meet and greet" events to support a candidate, CDCs may not make in-kind expenditures that benefit a candidate without prior approval of the Admin Committee. In addition, an CDC may not make expenditures to host an event where the purpose is to raise funds for a candidate prior approval of both the Admin Committee and the candidate.

Printed Materials:

To ensure compliance with federal campaign laws, CDCs must submit the following to designated DPO staff for approval 30 days prior to distribution or publication: flyers, bumper stickers, buttons or "swag," posters, or any other printed material.



Websites:

We recognize the value of CDCs having a web presence to coordinate activities, attract new members, and raise funds. Because CDCs are part of the Party, it's important to have that presence hosted by the DPO so that it can be maintained by DPO staff and understood by the public as being recognized by the Party.

Upon request, DPO staff will create web pages for each CDC that allow the CDC to receive single (not recurring) contributions by credit card, add and edit content, sign up new members, communicate with CDC officers, post events, and blog.

Online Advertising:

All online advertising must go through the expenditure process (as outlined in "Expenditures," above), and the content of all advertising must be reviewed and approved by the Executive Director and the Compliance Director.

Meetings:

The DPO budget covers pre-approved nominal costs for CDCs to rent spaces for their regular meetings.

CDCs may also meet at any free public venue. All meetings and events should be submitted to the DPO web site calendar as soon as they are scheduled (go to www.dpo.org/events/calendar and click the "Add+" button).

CDCs may not schedule meetings at DPO headquarters without prior approval from DPO Staff (operations@dpo.org).

Democratic Party of Oregon Four-Year Calendar

	Year 1	Year 2	Year 3	Year 4
First Quarter January February March	Leadership Retreat State Party Reorganization	Leadership Retreat Platform Convention	Leadership Retreat State Party Reorganization	Leadership Retreat Platform Convention
Second Quarter April May June	Local Elections Wayne Morse Gala	Primary Elections Wayne Morse Gala	Local Elections Wayne Morse Gala	Primary Elections Wayne Morse Gala Presidential Delegate Nominating Conventions
Third Quarter July August September		Ballot Measure Endorsements		Democratic National Convention Ballot Measure Endorsements
Fourth Quarter October November December	Oregon Summit Pass Two-Year Budget	Election Night Event County Parties Begin Reorganizing	Oregon Summit Pass Two-Year Budget	Election Night Event DNC Member Elections County Parties Begin Reorganizing

Key: Year 1 indicates the calendar year immediately following a Presidential Election, i.e. 2021.

Events in light green take place at that quarter's State Central Committee Meeting.

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Democratic Party of Oregon

Officers Guidebook

1st Edition

If you have suggestions or recommendations for future editions, please contact
DPO Operations Director Candy Emmons at operations@dpo.org or
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