



# MANUAL FOR DEMOCRATIC CLUBS

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# 1 SAN DIEGO COUNTY CHARTERED DEMOCRATIC CLUBS

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This manual is a resource for new and existing Democratic Clubs chartered by the San Diego County Democratic Party Central Committee (SDCDP).

The primary goal for establishing a club is to strengthen the Democratic Party by building and organizing capable and experienced leaders and volunteers. Other goals are to foster Democratic ideals by stimulating an active interest in the Democratic Party; to contribute to party leadership and responsibility; to provide constructive roles for volunteers in Democratic politics; and to promote an active base. These goals are achieved through:

- a) Voter education
- b) Grassroots Organizing (GO) Team
- c) Voter registration
- d) Political and social events
- e) Candidate recruitment and support
- f) Party platform support
- g) Club programs and speakers
- h) Fundraising
- i) Party involvement
- j) Input to/from candidates and incumbents
- k) Community outreach
- l) Endorsing Candidates
- m) Media engagement
- n) Local, state and national Issues

## 2 ESTABLISHING A CHARTERED CLUB

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### 2.1 Types of Democratic Clubs

Any Democrat can start a Democratic club. One person can start the ball rolling by identifying a few other local Democrats who are willing to find prospective members and to set up one or more meetings. SDCCDP classifies clubs as organized by geography, affinity/interest, or academic institution.

Most clubs are organized to serve members who live in a certain geographic area. Members address issues related to that area and directly support the campaigns of Democratic candidates within that area.

Democrats who are concerned with a particular issue or demographic such as business, disabilities, the environment, ethnicity, LGBT community, etc. often wish to be members of an affinity-based club.

Clubs affiliated with an educational institution are known as academic clubs.

### 2.2 Step-by-Step Approach to Establishing a Club

Whether you start as a committee of one or a few, Democratic clubs need a strong membership base to be successful. First contact Democratic friends, then locate other Democrats such as

precinct and campaign volunteers, civic or social leaders, elected officials or contributors. Contact the Director of Clubs if you need help. A personal touch is important during club organizing, so rather than just sending email, consider using USPS mail or phone calls to reach prospective members. In addition, Facebook event pages and announcements on Twitter are a good way to recruit members and spread the word about club formation.

Help is available from the Director of Democratic Clubs, the Club Development Committee, and the Council of Clubs (see Appendix Council of Clubs Mission Statement and Standing Rules). A Democratic club that has official recognition and conforms to federal and state campaign finance reporting requirements can participate with Democrats at higher organizational levels (e.g. club President serves as an Associate member on the Central Committee).

When organizing your first meeting, invite likely leaders and potential leaders that may help develop a new Democratic Club. Plan an agenda that will give very busy people a reason to attend, and when they arrive, make sure they feel welcome. The meeting time and location should be generally convenient; the site should be accessible for the physically challenged.

Present those attending with compelling reasons to form a Democratic group. Goals of the first meetings should include:

- a) Decide to form a Democratic club
- b) Determine the type of club (geographic or affinity)
- c) Establish an organizing committee (to serve until board is elected)
- d) Review the resources available through the SDCDP
- e) Schedule future meetings
- f) Assign specific tasks for the next meeting (action plan)

Help is available from the Director of Democratic Clubs, the Club Development Committee, and SDCDP staff. They can give you information that new clubs leaders should know right away (e.g., club presidents serve as Associate Members of the SDCDP Central Committee).

### 2.3 Opening a Bank Account

You'll need a bank account to deposit membership dues and issue checks for club expenses. To do so, first you'll need to get a Tax ID Number (TIN) from the IRS. It's easy to do online: go to [http://i.mp/sdcdp\\_ein](http://i.mp/sdcdp_ein), answer questions as a political organization, get EIN upon completion, download, save and print your EIN confirmation notice. Once club officers have been elected, provide the EIN to open a bank account.

## 3 CHARTERING

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At least 20 San Diego County registered Democratic members, or persons who intend to so register when eligible to do so, are required for a club to obtain a charter with the SDCDP. Membership must be open to all Democrats regardless of race, religion, national origin, sex, sexual orientation, or gender identity and the club must meet at least quarterly. Clubs must also

accept eligible members from any geographic area. After bylaws have been adopted (see sample in Appendix A), a club can apply for chartering. A Charter Application, with officer list, membership roster, and copy of the adopted bylaws is submitted electronically to the SDCDP (in a specified format) with annual dues of \$75 (waived for academic clubs). Refer to SDCDP Bylaws and Policies and Procedures for the current language on this process.

When proposing a new affinity club for chartering, members of the organizing committee must appear at a Central Committee meeting to provide an overview of the club and announce the next organizational meeting (see SDCDP Policies and Procedures for additional information).

Chartering establishes the club president or other club designee as an Associate member in the Central Committee (see SDCDP Bylaws details). Charter renewals for current clubs occur annually, with the Charter Application and related documents submitted to the SDCDP no later than December 15 for chartering in January. Whenever a club's bylaws are changed, a copy should be submitted to the SDCDP within 30 days to ensure continued eligibility for chartering.

### 3.1 Membership Requirements

To qualify for club membership, an individual must be a registered Democrat and pay any dues required by the club. A Sample Membership Application may be found in Appendix C.

Clubs may also permit membership to non-citizens and minors who commit to registering as Democrats once eligible to vote, or non-voting associate status to eligible voters who are not registered as Democrats. A qualified individual may be a member of more than one club.

The club's bylaws should include a definition of "Member in Good Standing". Only club members in good standing can be submitted to the California Democratic Party when a club seeks to participate in Pre-Endorsement Conferences (more on this in Section 13.2). Bylaws should include a provision for removing a member for cause.

## 4 CLUB ORGANIZATION

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### 4.1 Executive Board

The Executive Board consists of officers elected by the membership, normally including the President, Vice President, Secretary and Treasurer. It is a SDCDP requirement that all officers be registered Democrats or persons who intend to register as Democrats as soon as they are eligible. The suggested responsibilities of elected officers are:

President

- a) Preside over all meetings of the club and its Executive Board
- b) Make appointments to non-elected positions as required
- c) Act as official spokesperson of the club
- d) Stimulate active interest in the political process
- e) Provide constructive roles for members to become active participants and volunteers

- f) Demonstrate effective leadership and individual responsibility
- g) Promote harmony within the club membership, between other clubs and within the San Diego County Democratic Party

#### Vice President

- a) Serve at the direction of the President
- b) Preside at meetings if the President is unable to, or if requested to by the President
- c) Arrange for meeting locations and speakers (may be delegated)

#### Secretary

- a) Take and maintain minutes of general and Executive Board meetings
- b) Prepare internal and external correspondence as required by bylaws

#### Treasurer

- a) Collect dues from members
- b) Receive and deposit money received in club's bank account
- c) Sign all checks as authorized by the Executive Board
- d) Maintain an accurate record of club receipts and disbursements
- e) Make the record of club receipts and expenditures available upon request by a member
- f) Provide a report of club financial status at the club meetings as required by bylaws
- g) Provide an annual written report of club financial status to the membership
- h) File appropriate federal, state, and local campaign disclosure reports as
- i) Ensure that the club follows recommended financial practices

## 4.2 Additional Leadership and Recommended Positions

As the club develops, other positions may be established in order to meet club needs and encourage broad participation in club activities. The bylaws should state how committee chairs and other leadership positions will be appointed (e.g., elected by the body or appointed by the officers) and which of the leadership positions will be members of the Executive Board.

#### Committee Chairs

Many clubs include standing Committee Chairs as members of their Executive Board.

#### GO Team Liaison

The SDCDP asks that each club designate a GO Team Liaison to ensure timely communication between the club and the SDCDP's Grassroots Organizing Team. (See Section 9.4.)

#### Voter Registration Liaison

The SDCDP asks that each club designate a Voter Registration Liaison when chartering to ensure timely communication between the club and the SDCDP's Voter Registration Team.

#### Webmaster and Digital Marketing

Develops and/or maintains the club website and manages the club's online presence.

#### Newsletter Editor

Prepares and arranges for distribution of the club newsletter under the direction of the Communications Chair. Newsletters may be distributed by mail, email or as club website link.

#### Parliamentarian

The parliamentarian answers questions that may arise during meetings concerning conformity to the current edition of Robert's Rules of Order.

### 4.3 Committees

As the club develops, committees may be needed. The following is a list of possible committees and their missions. Some clubs designate as Standing vs. Appointed/Discretionary/Special committees. The club bylaws should state which committee chairs, if any, serve on the Executive Board as officers.

#### Political Action Committee

- a) Organize public event participation
- b) Identify local issues that require action
- c) Conduct legislative lobbying on issues
- d) Promote the club's involvement in SDCDP Voter Registration Team
- e) Promote the club's involvement in the SDCDP GO Team
- f) Support candidate recruitment
- g) Promote the club's involvement in campaign activity

#### Membership Committee

- a) Recruit new members
- b) Maintain membership records
- c) Encourage membership renewal
- d) Greet new attendees, pass out name tags, and log all attendee's names
- e) Ensure new members are welcomed (a sample letter is Welcome New Members Letter)



#### Fundraising Committee

- a) Plan and implement club or other fundraising events/activities
- b) Coordinate efforts with SDCDP events when appropriate

#### Special Events Committee

- a) Organize club participation at fair booths, rallies, parades and other events
- b) Coordinate efforts with other committees and/or clubs when appropriate

#### Communications Committee

- a) Prepares or otherwise arranges for club newsletter and press releases
- b) Encourages members to submit timely letters or comments to the editor

#### Hospitality Committee

- a) Ensure that refreshments are available at the club meetings, as appropriate.

#### Program Committee

- a) Ensure that timely and interesting programs are scheduled for club meetings

#### Nominating Committee

- a) The Nominating Committee submits a slate of candidates for offices prior to each (usually annual) election meeting. The club's bylaws should specify how the nominating committee is selected and what their process will be. The Nominating Committee is often comprised of current and former Executive Board members and non-board members.

#### Audit Committee

- a) The Audit Committee, which is often chaired by the Vice President, reviews the club's financial records annually and reports results to the Executive Board in writing.

#### Appointed Committees

- a) Some clubs specify that the president may appoint other committees beyond what is stated in the club bylaws subject to ratification by the Executive Board. The Executive Board will assign the mission of these committees.

## 5 MEETINGS

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Short, lively, and interesting meetings are incentives for membership participation. Clubs are encouraged to participate in identifying issues of interest to the local community. Clubs can provide arguments for and against issues and develop appropriate positions in letters to editors, candidates, and elected officials.

## 5.1 Location

Meetings are usually held monthly, at times and places convenient for members. Possible meeting locations may include municipal, county and state office buildings, libraries, schools, recreation centers, churches, clubs, banks, savings and loans, union halls and business facilities, and members' homes. Some locations may be free while others may assess nominal charges. Club meetings and event sites should be wheelchair-accessible. The SDCDP office may also be available to be reserved for club meetings.

## 5.2 Agenda/Content

Prior to each membership meeting, officers should distribute an agenda. This will keep the meeting running smoothly and rapidly. Meetings that exceed two hours usually discourage member attendance. Previous meeting minutes, Executive Board minutes, club committee reports, and SDCDP events may be part of the agenda. Old and new business to be considered by the members is typically included. Refreshments may be provided.

## 5.3 Speakers

Elected officials, colleges, public interest groups, unions and journalists are excellent sources for speakers. Newsletters from other clubs and the Council of Clubs meeting are excellent idea sources. Also, check with the Director of Clubs to see if a speakers list is available.

## 5.4 Notice

Notice of all meetings should be provided to all members of the club through the clubs newsletter, email, or other mechanism. For certain kinds of meetings, e.g., endorsement meetings, the SDCDP requires that all members be noticed at least two weeks in advance by email (or another method specified in your bylaws for those without email). This ensures that members are given the opportunity to participate in endorsements.

## 5.5 Quorum and Voting

Club bylaws should spell out quorum and voting requirements. Clubs may want to have an established quorum for all meetings or for business meetings only. For example, the quorum could be the number of elected officers plus 10% of the membership in good standing at the time of the meeting, but not less than 6 members (see Table 1).

It is recommended that quorum for endorsement meetings be increased to at least the number of elected officials plus 20% of membership and that the voting have super majority (60%, two-thirds, 70%) rather than a simple majority (greater than 50%) (see Table 2 for many options). Clubs should also specify if they are counting members present and voting or members present (where abstaining has the effect of a negative result).

**Table 1. Quorum**

<b>Officers</b>	<b>Members in Good Standing</b>	<b>Officers+10%</b>	<b>Officers+20%</b>	<b>&gt;50%</b>
4	100	14	24	51
4	50	9	14	26
4	20	6	8	11
6	100	16	26	51
6	50	11	16	26
6	20	8	10	11

**Table 2. Majority and Super Majority Vote Thresholds**

<b>Voting Members</b>	<b>&gt;50%</b>	<b>60%</b>	<b>Two-Thirds</b>	<b>70%</b>
15	8	9	10	11
20	11	12	14	14
25	13	15	17	18
30	16	18	20	21
35	18	21	24	25
40	21	24	27	28

Robert's Rules has specific instances where a two-thirds vote is required; this will apply to clubs who use Robert's Rules as their parliamentary guide unless they have made other specifications in their Bylaws.

## 5.6 SDCDP Requirements and Support

Meetings must be held at least once quarterly and SDCDP must also be noticed at least two weeks prior to all meetings. The meeting will be added to the SDCDP website which helps publicize your meeting. SDCDP will provide you with edit access to the calendar for your meetings to make it easy for you to highlight what is going to be happening at each meeting.

All prospective Democratic candidates must be invited to endorsement meetings for their race at least five business days prior to the meeting. If you need help figuring out who the candidates are, SDCDP keeps a list of all candidates and their contact information.

## 6 CLUB FINANCES

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### 6.1 Budgeting

Well managed clubs begin each year by adopting a budget. Budgeting starts with a listing of all anticipated club expenses for the year. These may include refreshments, printing, telephone, postage, post office box, bank charges, supplies, public event participation expenses, club charter fees, candidate support, meeting hall expenses, general liability insurance, and awards. The board must decide how funds to meet projected expenses are to be raised. Sources of funds include dues, contributions, and large and small fundraisers.

### 6.2 Dues

Dues are usually designed to cover meeting, newsletter and mailing expenses. The dues amount is recommended by the officers and approved by the membership. Most clubs keep dues relatively low to increase membership, with varying levels such as individuals, families, students, seniors, angels, and/or benefactors. Annual dues now range from \$5 to \$40 for individuals, \$15 to \$70 for a family, with opportunities for joining at a higher level for increased giving (see Appendix

Sample Club Membership Application).

### 6.3 Fundraising

Many clubs sponsor one or more fundraising events each year. These may be dinners, auctions, picnics, theater parties, pot lucks, etc. Candidates and elected officials often welcome the opportunity to participate in these events. Multiple clubs may wish to co-sponsor a large fundraiser in order to share the workload and produce larger crowds, which may enable attraction of a major speaker.

Every meeting can be an occasion for a small fundraiser. Door prizes can be raffled, lottery tickets sold, and works of art auctioned. Donation boxes can be used to defray refreshment and meeting hall costs. Clubs are encouraged to use imagination in designing fundraisers and to share their ideas with other clubs. Just take care not to discourage attendance by constant pressure to contribute.

### 6.4 Electronic Payments

Clubs can easily accept electronic payments on their websites as well as at club meetings. There are various services available that only charge per transaction without monthly fees; popular examples are Square and Paypal. Clubs that also have PACs and have additional reporting requirements might want to consider using ActBlue or Complete Campaigns.

## 7 COMMUNICATIONS

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### 7.1 Newsletters

Newsletters are an excellent way to keep members informed, involved, and motivated. Plan to send out a newsletter on a set schedule with details of upcoming events, relevant articles, and write-ups of past events. The most cost-effective way of distributing club news is via email. Some clubs print newsletters for those members who do not have access to email; with the cost of postage your club may want to request additional dues to defray this expense.

It's best to use one a bulk email service in order to comply with anti-SPAM legislation. One of the most popular is MailChimp, as it is free of charge for organizations sending less than 12,000 messages per month. Constant Contact and Vertical Response are alternatives. Clubs should send copies of their newsletters to [clubs@sddemocrats.org](mailto:clubs@sddemocrats.org) and to interested presidents of other clubs.

### 7.2 Domain Names

For a nominal annual fee to a registrar (roughly \$10), clubs should purchase their own unique domain name (e.g., ourclub.com) for their website and email. Domains can be purchased at Wordpress, NameCheap, GoDaddy, for example.

### 7.3 Websites

Clubs are encouraged to maintain a website that includes a calendar listing of future meetings and other events of potential interest to members, updates on club activities or issues of public interest in the community, and contact information for club officers and public officials. Highlighting local Democratic candidates and outstanding club members can increase interest and involvement.

New clubs can contact the Director of Clubs or the SDCCDP Office for advice for starting a simple website. If the club lacks members with skills to maintain a website, then a Facebook Page is a good alternative.

Once a domain is secured, the club must also pay for hosting to put their own content on the Internet. For security reasons it is recommended clubs use an established web publishing service rather than a small company and self-hosting. Wordpress.com offers free website hosting at no cost (and a club can use their own domain and remove advertising at minimal cost). Other services to consider are Squarespace, Weebly and Nationbuilder.

Consider configuring a RSS newsfeed from your website as this will allow your articles to be easily shared to other news services such as Flipboard and Apple's iOS9 News app.

### 7.4 Email

Each club should have a non-personal club email address that is either forwarded to or checked by the President or other club officers so that the club has a permanent email address that doesn't change with the election of new club officers. Most clubs set up email accounts using their own domain name or a standalone Gmail account. SDCCDP will include one address on the SDCCDP website and on the printable directory of clubs. The main email address, or another non-personal address specified by the club during annual chartering, will be used for Council of Clubs communications.

Suggested email addresses:

info@clubname.org  
president@clubname.org  
vp@clubname.org  
secretary@clubname.org  
treasurer@clubname.org  
clubname@gmail.com (for clubs who do not have their own URL)

### 7.5 Social Media

Clubs should consider maintaining Facebook and Twitter accounts to amplify their online presence and to engage their local communities in conversations supporting Democratic principles. Twitter is particularly useful for direct engagement with club members, local elected officials, journalists, and other Democratic organizations.

The Facebook page and Twitter accounts can be linked together so that a Tweet is generated for each new Facebook post. Encourage all of your Executive Board to share articles of interest to your club's Facebook Page. Like posts on Facebook from Democratic groups, and leave comments on local news sites using your Facebook persona.

Members may prefer to view images or video than read text. You may attract new members by catching their eye with an interesting image, or short video. Consider taking photos at your events and posting them to Facebook and Twitter as well as Instagram and Pinterest. Just using a smartphone you can record your meetings and post clips to YouTube, Vimeo and Vine, or livestream to Periscope, Meerkat or Ustream.

You can easily share audio recordings of your meetings as podcasts using an RSS newsfeed from on your website for members to listen to at a later time.

## 7.6 Phone Tree

When club members do not have access to email, a phone tree consisting of volunteer members is a helpful and effective way to remind them of meetings, notify them of changes that occasionally occur, and communications about events that may happen between meetings or on short notice.

## 7.7 Press Releases

Information concerning club positions and events is communicated to the media through press releases and distributed electronically or by mail. Authority to issue or approval required in accordance with bylaws. A sample press release format is provided in Appendix D.2 Press Release Format.

# 8 PERMANENT ADDRESS AND PHONE

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## 8.1 Post Office Box

Clubs that maintain a post office box benefit from a permanent address that carries over when new officers are elected, preventing misdirected or lost mail.

## 8.2 Phone Line

All clubs can take advantage of various free phone services. The advantage is that each club then has a permanent phone number that doesn't change with the election of new club officers. One of the most popular free services is Google Voice. A local phone number is provided that can be directed to ring to one or more Executive Board members personal phones, and whoever answers first gets the call. Alternatively all calls can be directed to voicemail and the service then alerts the configured Executive Board members of the waiting message.

## 9 POLITICAL ACTION

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### 9.1 Candidate Development

Clubs work closely with the SDCDP to identify and develop viable candidates for public office. The candidate development pipeline often begins with an appointment to a local board or commission, or election to a special district (water, hospital, planning) or other local board. The Registrar of Voters (ROV), [www.sdvote.com](http://www.sdvote.com), has a Directory of Public Officials, which includes all local elected officials, their terms of office, and filing requirements. Check with the SDCDP to see what information is available in a geographic or spreadsheet format.

### 9.2 Candidate Support

Clubs can help Democratic candidates by circulating nominating petitions, volunteering (precinct walking, phone banks, office work), fundraising, distributing literature, and other means of support. If your club seeks to make a financial contribution to a campaign, be sure to research the legal requirements and restrictions that may apply.

### 9.3 Voter Registration

Democratic voter registration is one of a club's primary year-round activities. One club member should serve as club liaison to work with the SDCDP Voter Registration Team and club members to host their club's booth at appropriate events, fairs, festivals, and other locations. Clubs are asked to assist the team at the monthly swearing-in ceremonies of new citizens in downtown San Diego.

To enable the SDCDP to track our success and follow up with new voters, please be sure to obtain pre-stamped voter registration forms at the SDCDP office and return them to the SDCDP office when completed.

### 9.4 Precinct Organizing (GO Team)

As the SDCDP's ongoing precinct leader program, the Grassroots Organizing (GO) Team recruits, trains, equips, and deploys volunteers to reach out to their neighbors to support the full slate of Democratic endorsements in every election. Statistical results of this ongoing program prove the GO Team's value in turning (or keeping) our communities "blue." Because clubs are the best source for GO Team volunteers, each club is asked to have a GO Team liaison to recruit club members to join the GO Team and work with the GO Team Coordinators in their area; in most cases the liaison is already a GO Team member or coordinator. As an added benefit participating in the GO Team in your community is a great way to promote your club!

### 9.5 Satellite and Coordinated Campaign Offices

In election seasons, the SDCDP often establishes coordinated campaign offices with candidates and clubs to organize regional voter-contact efforts. Clubs are essential in staffing and financing these offices.



## 10 ENDORSEMENTS

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Clubs may take positions on candidate races and ballot measures independently of the SDCDP, in accordance with their bylaws. While the power to endorse candidates can greatly strengthen a club's influence, it should be used with discretion. A vigorous, thoughtful, and democratic process should be used for making endorsements by the club membership.

### 10.1 SDCDP Requirements for Chartered Club Endorsements

Clubs' bylaws must be consistent with the SDCDP requirements for club endorsements. They include:

- a) Only registered Democrats may be endorsed.
- b) Non-Democrats may only be rated acceptable or unacceptable.
- c) Chartered clubs shall notice their full membership by email of an endorsement consideration at least two weeks prior to the endorsement meeting.
- d) Chartered clubs invite all prospective Democratic candidates at least 5 business days prior to the meeting and provide details on the club's process.
- e) Endorsements are not to be construed as SDCDP or CDP endorsements; words to that effect must be included whenever the club's endorsement is referred to.
- f) Any publication of endorsements shall delineate between endorsed and rated acceptable candidates.

### 10.2 SDCDP Endorsements and Club Participation

The SDCDP is solely responsible for making official Democratic Party endorsements for county, municipal, school/college board, and special district board races in San Diego County, as well as local ballot measures. That process begins at the Area level (Central, East, North, or South), with Central Committee members in that Area (including club Associate members) recommending an endorsement to the full Central Committee.

Each club should have a process in its bylaws that governs the selection of its Associate, if that person is not the club President. Associates may vote in all Area meetings and may participate in discussion, though not vote, in full Central Committee meetings. More information is available from the Director of Clubs or the Vice Chair in your Area.

### 10.3 California Democratic Party (CDP) Endorsements and Club Participation

The California Democratic Party (CDP) is solely responsible for making endorsements for U.S. Senate, Congressional, Statewide, State Senate, State Assembly, and Board of Equalization races, as well as statewide ballot measures. Endorsements are made at the CDP Convention in February of each election year, which is preceded by Pre-Endorsement Conferences around the state in January where local delegates (a.k.a. Democratic State Central Committee members) in each CDP Region, in addition to club representatives, may vote to recommend endorsements to the full State Central Committee.

Clubs may designate one representative for each 20 members registered to vote in a single Assembly District. In order to be represented, clubs must submit their membership roster and their bylaws to the appropriate CDP Regional Director(s) by July of the year prior to the election year. Additionally, a club's bylaws must define "member in good standing" and stipulate the process by which the club selects its representative(s) for the Pre-Endorsement Conferences. Please contact the SDCDP office or your CDP Regional Director for more details.

## 10.4 Club Endorsement Process

Beyond the endorsement rules required for chartering with the SDCDP, there are several additional recommended endorsement policies that clubs may incorporate into their bylaws:

- a) Candidate surveys, which should be sent to all Democratic candidates for a race under consideration and received at least five days prior to the scheduled endorsement meeting. Bylaws can state whether a candidate or campaign representative must be present to be considered and how extenuating circumstances will be handled. Candidates can be asked to step out of the room during discussion and voting. A synopsis of completed candidate surveys can be made available to all club members eligible to vote.
- b) Successive votes in races with multiple candidates, so that if no candidate receives the required percentage for endorsement, further ballots are taken deleting the candidate receiving the least number of votes and those receiving no votes on the previous ballot.
- c) Those voting on an endorsement must have been members for a fixed period of days (e.g., 30) before the endorsement meeting. No proxy or absentee voting should be permitted.
- d) A specific quorum for endorsement meetings, which may be higher than the quorum required for regular business.
- e) A specific vote threshold for endorsements, which may be a supermajority rather than a simple majority (e.g., 60%).

## 11 FINANCE AND LEGAL COMPLIANCE

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Political activity is regulated at the federal, state, and local levels. Clubs that spend funds on campaign efforts, including financial contributions, must do their due diligence to ensure compliance with all applicable laws. Clubs are responsible for filing any required financial reports.

### 11.1 Filing as a State Political Committee

Under California law, any organization that receives contributions totaling \$1,000 or more in a calendar year to spend in connection with state or local elections must file as a "general purpose recipient committee" with Secretary of State. This includes monetary or in-kind contributions to state or local candidates or ballot measures, public communications supporting or opposing campaigns, or any other expenditures made for political purposes, including voter registration. A club must file a Statement of Organization (FPPC Form 410) with the Secretary

of State within ten days of reaching \$1,000 in political fundraising or spending in a calendar year.

For most clubs that spend their funds on organizational expenses (room rentals, refreshments, postage, technology, etc.) rather than political expenses (campaign mailers, candidate contributions, voter registration), it is easy to avoid reaching that threshold.

For those that do file with the state, a Recipient Committee Campaign Statement (FPPC Form 460) must be filed periodically listing contributions, expenditures, and cash on hand for each reporting period. A Late Contribution Report (FPPC Form 497) must be made within 24 hours of an aggregate \$1,000 contribution to a state/local candidate or a party committee within 90 days of a state election. A fine may be imposed for each day a report is late past the deadline.

Here are some additional state campaign-finance requirements:

- a) Public communications for or against state/local candidates must include the legible name and address of the committee.
- b) Fundraising solicitations (including for dues) must request the donor's name, physical address, occupation, and employer.
- c) Anonymous contributions of \$100 or more are prohibited.
- d) Individual contributions aggregating to \$100 or more in a year must include occupation/employer or else be returned in 60 days.
- e) A committee may not accept cash contributions or make cash payments of \$100 or more.
- f) A committee may not keep cash assets of \$100 or more.
- g) Copies of all payments, receipts, and documents related to contributions must be kept for four years.

For more information, go to [www.fppc.ca.gov](http://www.fppc.ca.gov) or call (866) 275-3772.

## 11.2 Filing as a Federal Political Committee

Any organization that receives or spends \$1,000 in a calendar year to influence *federal* elections must register as a federal committee through the Federal Election Commission (FEC). This includes expenditures that support or oppose the election of any candidate for federal office. (Federal campaigns can accept direct contributions only from individuals and other federal committees.)

Within 10 days of reaching the \$1,000 federal threshold, a committee must file a Statement of Organization (FEC Form 1); an FEC ID number will be issued. A bank account must be set up to hold the federally qualified funds. Quarterly or monthly reports on receipts and disbursements (FEC Form 3) must be filed electronically or by mail, and fines may be imposed for reports filed late.

Federal election regulations are exceedingly stringent and complex. For example, within 90 days of a federal election, federal committees must pay certain generic voter registration and GOTV expenses with federal funds. Federal and non-federal funds must be strictly segregated. For more information, go to [www.fec.gov](http://www.fec.gov) or call (800) 424-9530.

### 11.3 Local Requirements

Some local jurisdictions (cities, school districts, the County of San Diego) have additional regulations on contributions and or political communications. Contribution limits may apply to amounts and/or sources. For example candidates in the City of San Diego cannot accept a contribution from a club (or any entity other than an individual). Clubs should consult the appropriate authorities whenever considering activities that may fall under local political laws.

### 11.4 Financial Best Practices

There are several financial procedures that, while they or may not be legally required, can help ensure fiscal responsibility, accountability, and transparency for clubs. The SDCDP recommends the following:

- a) Always deposit cash in the bank before spending it.
- b) Count cash at the immediate end of any fundraising event, preferably by two people.
- c) Review bank statements for unauthorized transactions, and reconcile statements with accounting records each month.
- d) Reconcile bank records with disclosure reports prior to filing (if applicable).
- e) Reconciliations should be done by someone other than a check signer.
- f) Limit the number of people who can sign checks.
- g) Checks over a certain amount (\$1,000) may be required to have the signatures of two signers.
- h) Individuals who authorize disbursements or sign checks should be identified in writing in the club's internal policies.
- i) Get invoices and/or receipts for all payments.
- j) Club bylaws should clearly specify what expenditures need approval, and by what entity (e.g., expenses below a certain amount may be approved by the President or Board).
- k) The Treasurer should keep copies of received checks and disbursement forms for reconciliation.
- l) The Board should regularly see bank statements, with income reports included.
- m) If using a petty cash system, keep the allocation less than \$100, put one person in charge of distributing the funds, and balance the funds with a written form.
- n) Record receipts as mail is opened, and deposit all contributions within 30 days of receipt (or return, if necessary).

## 12 CLUB DEVELOPMENT

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The following notes on club development may assist you in establishing or enhancing your club's programs.

### 12.1 Dedication

Developing a successful club requires commitment of each club officer's time and energy. The importance of setting both personal and club goals cannot be overstated.

### 12.2 Club Expansion

To be successful a club must increase its membership. Democrats join a club to share mutual concerns and work toward common goals. Offering enthusiasm and a sense of belonging, while presenting meaningful programs at meetings, helps to expand the membership.

### 12.3 Membership Records

Use the same spreadsheet that is submitted with membership contact info records to the SDCDP/CDP to record meeting attendance, when dues were paid and how much, skills and interests, languages spoken, and other information relevant to your club. You may also choose to store this information in MailChimp, or another cloud-based service you are using for your club, to provide centralized access to your club officers and as a backup in case of loss of paper records.

### 12.4 Welcoming Newcomers

The club Executive Board (more specifically the Membership Director or officer to whom these duties have been assigned) should take responsibility for welcoming newcomers at club meetings. The President is normally busy therefore he/she must have help in greeting both members and newcomers.

Some ideas are:

- a) Station friendly members at the door to greet people as they arrive. Two or more relaxed gregarious members greeting newcomers at the door can make them feel welcome and "at home" at the meeting. Introducing newcomers to others helps shy people become acquainted.
- b) Place a table near the entrance with a sign-in paper for all attending to write their name, address and phone number. The table should also contain name tags and wide felt pens (be sure names are written legibly in large block letters), membership applications, club brochures and other appropriate Democratic literature.
- c) Serve refreshments; refreshments induce people to stand around and talk, enabling members and newcomers to know each other. Servers may help to give new folks someone with whom to speak.

- d) At a small meeting whoever is presiding may ask each new attendee to introduce himself/herself, and add something about where he/she lives when he/she has come to the area, etc. In larger clubs, in the interest of time, newcomers, guests and new members may simply be introduced.
- e) Follow-up calls to new and interested persons helps make them feel welcome. The sign-in sheet provides a good cross-reference. Be sure they receive the next newsletter.
- f) Send a welcome letter via US or email. See D.1 Welcome New Members Letter.

## 12.5 Intra-Club communications

Emails or phone trees, consisting of volunteer members, are helpful and efficient for reminders of meetings, changes which occasionally occur, and communications about events that may happen between meetings. Long-time members, as well as new ones, appreciate reminder calls.

## 12.6 Phone Listing

Listing of your club in the phone book may be very valuable, especially in an election year.

## 12.7 Programs

Many resources are available to aid in identifying interesting speakers; they include colleges, community groups, newspapers, speakers list, other club newsletters, and the monthly Council of Clubs meetings. Keep a file of program ideas.

## 12.8 Traditions

Club traditions should be built with annual activities, such as sponsoring a club booth at a street fair, an annual picnic, participation in a 4th of July parade, a barbecue or yard party, a theatre party, or by sponsoring a headquarters during the presidential election year.

## 12.9 Fundraisers

Raising funds to support club activities and candidates is very important. Examples of fund raising activities include raffles, sales of donated books, plants sale, holiday boutique of handmade or homemade items, and dinners such as spaghetti, pizza, etc.

## 12.10 Roosevelt Dinner

The Roosevelt Dinner is SDCDP's major annual fundraiser that keeps the office open year-round, and clubs have long been a base for attendance and support. Clubs are offered discounted tickets for their members to sit together at tables. Clubs are also asked to put together a club basket to be part of the silent auction. A "Club of the Year" award, chosen by the Council of Clubs (see Section 13.1), is presented annually at the dinner.

### 12.11 Political Action

Club volunteers are the cornerstone of successful action. Political action may include local fair booths, voter registration at malls, precinct organization, and establishment of a speaker's bureau for outreach to other organizations. Members should also be encouraged to serve at other levels of the party, such as the GO Team, Voter Registration Team, on SDCDP committees, and to become a member of the Central Committee of the State Party and/or County Party.

### 12.12 Publicity

Publicity takes persistence and patience. Development of long term relationships with reporters should be a goal. The wording of a press release can make the difference between a news item being accepted or discarded.

### 12.13 Transition for New Club Officers

After the election of new officers it may be helpful to have a board meeting with both the old and new officers present. This will be the time for counterparts to pass on their files and to explain the ins and outs of the jobs.

### 12.14 Recognition and Thanks

Club members and volunteers receive no compensation for their efforts; therefore their rewards are recognition and gratitude as well as their satisfaction when Democratic candidates are elected. Outstanding volunteers may be recognized with awards presented at club meetings.

## 13 PARTY INFRASTRUCTURE AND RESOURCES

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Overall information about the structure of the national, state, and county party organizations, including ways for club members to become more involved, can be obtained from the SDCDP office. A chart at [www.sddemocrats.org/orgchart](http://www.sddemocrats.org/orgchart) shows the structure and relationships among the federal, state, and local Democratic entities.

Following are aspects of Democratic Party organization and resources relevant to clubs.

### 13.1 San Diego County Democratic Party

With a full-time staff of two and hundreds of dedicated volunteers, the SDCDP maintains a year-round office in Kearny Mesa and works on behalf of Democratic candidates at all levels, from President and Governor down to local elected offices. The County Party's principal activities include voter education, voter education and mobilization, public communications and outreach, candidate recruiting and training, and Democratic organizing, including club development.

In addition to this Manual, the SDCDP offers a number of resources for clubs:

## Publicizing Club Events

Each chartered club's website and club email address, along with a calendar of scheduled club meetings, is posted on the Clubs page of the SDCDP website ([www.sddemocrats.org/clubs](http://www.sddemocrats.org/clubs)). Clubs should name a designee to add and edit events, including regular meetings, on the Party's calendar ([www.sddemocrats.org/calendar](http://www.sddemocrats.org/calendar)). The Clubs page of the SDCDP website has a downloadable list of all chartered clubs along with their websites, phone numbers, and email addresses.

## Use of Office and Equipment

The Party's office is available for club meetings or other activities by appointment. Clubs can borrow various equipment from the Party office for meetings and other activities, including a projector, screen, tables and chairs, pop-up canopy, sound system, and campaign materials.

## Insurance

The SDCDP's insurance policy can be extended to cover to one-time club events; make sure to allow several days to process a request and provide a certificate of coverage. While the policy does not allow SDCDP to cover a club's regular meetings, clubs can obtain their own basic coverage through the CDP for an annual premium of \$550.

## Voter Registration

SDCDP works with clubs to ensure representation at community events and festivals, providing opportunities not only to register voters, but also to recruit club members, promote candidates, and raise visibility. SDCDP staff can provide help with event applications and the use of supplies as well as training and volunteers for voter registration. After registration forms are returned to the SDCDP office, they are checked for completeness and any missing information is collected from registrants before turning them in. SDCDP also calls the Democrats to welcome them to the Party, and offer information about upcoming elections and local Democratic clubs. The information is also entered into VoteBuilder, enabling SDCDP to confirm that all those people are added to the rolls and later target them to make sure they vote.

## Voter Data

The County Party obtains frequent updates of the countywide voter file and manages that data through VoteBuilder (VAN), which includes enhancements added by the DNC and campaigns that have used the system. SDCDP can provide types and formats of data tailored to meet a club's needs for recruiting or voter contact, such as Excel files for mailing, PDF lists for canvassing, or a Virtual Phonebank for making calls. SDCDP works with clubs to develop effective outreach programs using voter data. Clubs return any data they gather (wrong numbers, prospective volunteers) back to the Party so that future users can benefit from the information. Each club can access a "Quick Lookup" VoteBuilder account to verify registration of members and their voting districts.



## GO Team Coordination

The Party's ongoing precinct program – the Grassroots Organizing (GO) Team – coordinates Democratic volunteer-driven voter contacts countywide. GO Team members reach out to voters on behalf of all endorsed Democratic campaigns in election seasons. Each club is asked to have a dedicated GO Team liaison to ensure club participation and representation. The GO Team provides the materials and support for club members to “adopt” precincts in their community. GO Team volunteers are trained to actively promote and recruit for clubs in their conversations with voters.

## Technical Assistance and Advice

To the best of their ability, SDCDP staff will advise clubs on technical issues, finance and compliance questions, recruiting and organizational development, and more. The Party also facilitates trainings that address club needs, usually in partnership with the California Democratic Council. SDCDP's biennial County Democratic Convention includes a full track of club oriented breakout sessions, and club meeting presentations by Party representatives can be scheduled by request.

## Club Development Committee

SDCDP has a standing Club Development Committee to identify and address the needs of clubs and to support the organization of new club. Updating this manual is the responsibility of the Club Development Committee.

## 13.2 Council of Democratic Clubs

The Council of Democratic Clubs is an informal assembly of Democratic Club and Democratic Coalition presidents, or their designated representatives. The Council's purpose is to foster communication and cooperation between Council members, to assist in building the organizational capacity of Clubs and Coalitions, to develop and implement projects that are beneficial to Council members' operations, and engage in other activities as the Council deems appropriate. The Director of the Council of Clubs is an Ex-Officio member of the SDCDP Central Committee and an officer on the Executive Board. The Council of Democratic Clubs is not a governing body for the entities represented. See Appendix E for its Standing Rules.

## 13.3 California Democratic Council (CDC)

The California Democratic Council (CDC) is chartered by the California Democratic Party as a statewide association of Democratic clubs and county committees. Clubs may opt to charter as members of the CDC; this is separate from their SDCDP charter, which is county-based. The CDC website is at [www.cdc-ca.org](http://www.cdc-ca.org) and has many resources for clubs. They do have sample bylaws available; these may not meet all SDCDP bylaw requirements.

## A. Sample Bylaws

These Bylaws are compliant with CDP and SDCDP requirements for clubs and can be used as a model for building or revising club bylaws. Annotations showing the CDP and SDCDP requirements are shown in the right column.

<p><b>BYLAWS</b></p> <p>_____ DEMOCRATIC CLUB</p> <p><b>ARTICLE I - NAME</b></p> <p>The name of this organization shall be the (Club Name), hereafter referred to as XXXXX.</p> <p><b>ARTICLE II - PURPOSE</b></p> <p>The purpose of this club shall be to foster democratic ideals by stimulating active interest in the Democratic Party, to support the party platform, contribute to party leadership and responsibility, to provide a constructive role for the volunteer in Democratic politics, and to promote an activist base.</p> <p><b>ARTICLE III - MEMBERSHIP</b></p> <p><b>SECTION 1 - ELIGIBILITY</b></p> <p>Anyone registered as a Democrat or is ineligible to vote (due to age, non-residency or other legal impediment) but pledges to register as a Democrat when eligible, and supports the purpose of the Club as stated in Article II, above shall be eligible for membership in this club.</p> <p><b>Section 2 - GOOD STANDING</b></p> <p>Democrats and pledged Democrats, whose annual dues are currently paid, or had waived, shall be considered a member in good standing. Any member whose actions are judged to be prejudicial or detrimental to the club by the Executive Board may be expelled from membership by a two-thirds vote at any general meeting, at which a quorum exists, concurs.</p> <p><b>SECTION 3 - DUES</b></p> <p>Dues shall be reviewed mid-year and recommended by the Executive Board, for approval by the membership, to go into effect for the next membership year. Dues are due and payable upon joining the club, and annually at the beginning of every club calendar year thereafter. Payment of</p>	<p>Open to all Dems is a SDCDP requirement. Option to have non-voting Associates who are not Dems; however 2/3 of all members must be Dems.</p> <p>Defining Good Standing is a CDP requirement</p>
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<p>dues shall not be obligatory to anyone for whom it constitutes an economic hardship after due consideration and approval by the Executive Board.</p> <p><b>SECTION 4 - VOTING</b></p> <p>A member in good standing who has attended at least one prior meeting shall be eligible to vote. No proxy voting or absentee shall be permitted.</p> <p><b>ARTICLE IV - OFFICERS</b></p> <p><b>SECTION 1 - ELECTED OFFICERS</b></p> <p>Elected officers of this club shall be the President, Vice-President, Secretary and Treasurer. All officers must be registered Democrats. Each shall be elected at the general meeting in January and hold office for one year. An elected officer may be removed from office by resolution of a two-thirds vote of the members at a General Meeting for such causes as missing three unexcused consecutive meetings or non-performance of duties, providing the membership and the officer have been notified ten days in advance of the meeting of the proposed action against the officer.</p> <p><b>SECTION 2 - DUTIES</b></p> <p><b>A. President</b></p> <p>The President shall be the Chief Executive Officer of the club. He/she shall preside over all meetings of the club and the executive board; make appointments to other positions as required; act as official spokesperson of the club. In addition, the President should stimulate active interest in the political process, provide a constructive role for the active volunteer; contribute to effective leadership and individual responsibility; promote harmony among the club membership, between other clubs and within the San Diego County Democratic Party.</p> <p><b>B. Vice-President</b></p> <p>The Vice President shall serve at the direction of the President. He/she shall preside at meetings if the President is unable to do so, or is requested by the President to do so. The Vice-President shall take over the duties of President in the absence of that officer, and is responsible for the annual audit.</p> <p><b>C. Secretary</b></p>	<p>SDCDP requirement that only Dems or intended Dems are eligible to vote.</p> <p>SDCDP Requirement that officers be Dems.</p>
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The Secretary shall keep the minutes of the general meetings, executive committee meetings, conduct correspondence, maintain the club's records, and is responsible for internal communications.

**D. Treasurer**

The Treasurer shall be responsible for the collection of dues, receive and deposit all club funds received; maintain an accurate record of club receipts and expenditures; sign all checks as authorized by the Executive Board; make the record of club receipts and expenditures available to any member when requested; provide a report of the club financial status at club meetings as requested; provide an annual written report of club financial status; make the books and all other financial records of the club available to the audit committee each year in May. In addition the Treasurer shall be responsible for filing FPPC/FEC financial report on time as required.

**SECTION 3 - ELECTIONS**

Elections shall be held annually. A nominating committee shall be appointed of 3 to 5 volunteers from the membership. The nominating committee shall select at least one candidate for each elective office and report their selections at the general meeting one month prior to the election meeting. At the election meeting the floor will be open for additional nominations. The election may be held by show of hands or voice vote for uncontested offices. A secret ballot will be used for any contested offices. Those nominees who receive a majority vote shall be declared elected. If no person receives a majority of votes cast, a run-off shall be held between those two persons receiving the greatest number of votes. The person receiving the majority of the votes shall be declared elected.

**SECTION 4 - VACANCIES**

Should any officer resign or fail to attend three general meetings or Executive Board meetings in a row without cause approved by the Executive Board, the Executive Board shall declare that office vacant and appoint a successor to that office to complete the unexpired term. Any such appointment shall, however, be approved by the membership at the next general meeting. At that meeting, nominations to fill the vacancy shall also be accepted from the floor. Voting shall be by secret ballot with a majority of those members in good standing present required to elect.

**SECTION 5 - APPOINTED OFFICERS**

The President shall appoint a parliamentarian and any other officers not otherwise specified by these bylaws as required for the general well-being of the club.

While recommended, a nominating committee is not a requirement.

It is also recommend that clubs consider having a higher quorum and/or use a supermajority for elections.

**ARTICLE V- MEETINGS**

**SECTION 1 - GENERAL MEETINGS**

There shall be a minimum of six general meetings each year, at least one of which shall be in January. Other general meetings shall be held at such times and places as specified by a majority of the Executive Board.

**SECTION 2 - QUORUM**

A quorum at any general meeting shall the number of officers plus ten percent (10%) of those whose membership is in good standing. A quorum at an endorsing/electing meeting shall the number of officers plus twenty percent (20%) of those whose membership is in good standing. A quorum of the Executive Board shall be a majority of its elected members.

**SECTION 3 - PARLIAMENTARY AUTHORITY**

The parliamentary authority is the most recent edition of Robert’s Rules of Order, Newly Revised.

**SECTION 4 - NOTICES**

At least two (2) weeks prior to a general meeting at which the following items will be discussed and voted upon, meeting notices shall be emailed to each member of the club in good standing:

- Club elections and filling of vacancies
- Proposed amendments to bylaws
- Proposed resolutions
- Endorsements of candidates and/or ballot measures

Such notice shall specify the time, place and date of the general meeting and describe the event.

**ARTICLE VI - EXECUTIVE BOARD**

**SECTION 1 - FUNCTION**

The Executive Board shall approve all expenditures and carry out the club business between general meetings in a manner consistent with actions taken at the general meetings, and perform any other duties provided for in these bylaws. The President shall pre-approve any written correspondence

There is no quorum requirement but it is important to ensure sufficient members participate in endorsements and elections.

Two weeks notice prior to endorsements is a SDCDP requirement.

on behalf of the club. The President shall be the sole spokesperson of the club.

**SECTION 2 - MEMBERSHIP**

Membership of the Executive Board shall include all of the currently elected club officers, and the then current Committee Chairs.

**SECTION 3 - MEETINGS**

The President shall call a meeting, with advance notice, of the Executive Board as needed. Special meetings may be called by a majority of the currently elected members of the Executive Board at any time. A majority of the then currently elected members of the Executive Board shall constitute a quorum.

**ARTICLE VII - STANDING COMMITTEES**

The standing committees for the club are as follows shall include both Audit and Nominating committees. Other committees may include Political Action, Membership, Fund Raising, Program, Special Events, Communications, Hospitality and others as identified by the President and ratified by the Executive Board.

**ARTICLE VIII - CANDIDATE ENDORSEMENTS**

A. Only candidates who are registered Democrats are eligible for Club endorsement.

B. All endorsements of candidates or resolutions concerning ballot measures or public issues must be in accordance with the standards established by the California State Democratic Party and the San Diego County Democratic Party. It is also the tradition and stated goal of the Club not to make endorsements or to pass resolutions which will adversely affect the unity of the Democratic Party.

C. A motion to endorse a candidate or take a position on a Proposition or public issue must receive the vote of a seventy percent (70%) of the Club members in good standing who are present and voting.

**ARTICLE IX – CLUB REPRESENTATIVES**

**SECTION 1. California Democratic Party (CDP)**

In order to be eligible to participate in CDP pre-endorsing conferences, the Club's President, Secretary, or Treasurer will ratify the roster of Democratic members in good standing by July 1 of each odd-numbered year identifying

SDCDP Requirement that only Dems be endorsed. Non-Dems can be rated acceptable or unacceptable.

A higher quorum and super-majority is recommended for endorsements.

Ratifying roster and submitting to CDP is a pre-endorsing conference requirement. Be mindful that clubs members can

the legislative districts and representatives for each district and submit it to the CDP and SDCDP. Representatives should be equally apportioned between men and women to the extent possible.

**SECTION 2. San Diego County Democratic Party (SDCDP) Associate Member**

Under the club’s charter with the SDCDP, its President is a representative to the SDCDP Central Committee as an Associate Member. If the President is already a Central Committee member or chooses not to serve, a different representative may be selected to serve his or her term according to the provisions of Sections 3 and 4 of this Article. An Associate Member application, for the President or any other representative, must be submitted to the SDCDP within 30 days of his or her selection by the club.

**SECTION 3. Selection**

Club representatives to the CDP and SDCDP – and any other official representatives, delegates, and alternates from the club to conferences, caucuses, councils, conventions, and other meetings – shall be selected by a vote of members in good standing at a duly noticed club meeting or, if that cannot occur at a regular or special meeting, by designation of the President

**SECTION 4. Adherence to Club Positions**

Club representatives described in this Article, when participating in voting and discussion in that capacity, shall adhere to and represent the club’s official positions on endorsements and other matters wherever applicable, and shall agree to do so prior to their selection.

**SECTION 5. Other SDCDP Representatives**

- A. The Executive Board will designate a GO Team Liaison.
- B. The Executive Board will designate a SDCDP Voter Registration Liaison.

**ARTICLE X - AFFILIATION**

The club shall affiliate as an associate member of the County Democratic Central Committee and pay the current annual chartering fee.

**ARTICLE XI - AMENDMENTS**

These bylaws may be amended by a majority vote at a general meeting after such amendment has been presented at the preceding general meeting and notice has been provided as specified in Article V, Section 4 of these bylaws.

only “count” for one club.

Most clubs welcome the opportunity to have an SDCDP Associate member and participate in the caucuses and endorsement process.

Including selection process in the bylaws is a CDP requirement.

**ARTICLE XII - ADOPTION**

These bylaws shall become effective immediately upon their adoption and shall be the governing rules of the club.

Date:



## B. Charter Application Checklist (New/Renewal)

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All chartering is done electronically with online forms and email. Please collect the following information prior to submitting your club's charter or renewal application on-line at [www.sddemocrats.org/clubcharter](http://www.sddemocrats.org/clubcharter). The Central Committee votes on new and renewed charters at the Central Committee meeting after all application, documents, and fee requirements are met. Annual renewals are due December 15 for the following year and rechartering takes place in January.

### CLUB INFORMATION

- Geographic  Affinity  Academic (see [www.sddemocrats.org/bylaws](http://www.sddemocrats.org/bylaws) X.2)
- Month of club officer elections: \_\_\_\_\_
- SDCDP Area:  Central  East  North  South

### REQUIRED DOCUMENTS

- Date emailed list of members to [clubcharter@sddemocrats.org](mailto:clubcharter@sddemocrats.org) \_\_\_\_\_
- Date emailed list of officers to [clubcharter@sddemocrats.org](mailto:clubcharter@sddemocrats.org) \_\_\_\_\_
- Date emailed pdf copy of the club bylaws [clubcharter@sddemocrats.org](mailto:clubcharter@sddemocrats.org) \_\_\_\_\_
  - Page number that specifies meeting notification for endorsement meetings \_\_\_\_\_
  - Page number that specifies process for selecting SDCDP members \_\_\_\_\_
  - Date of bylaws last update \_\_\_\_\_
- Date sent a check for the club chartering fee of seventy-five dollars (\$75) \_\_\_\_\_  
Fee is \$50 if recharter renewal is completed by December 15 due date

### MEETINGS

- Meeting day of week, week of month or list of meeting dates \_\_\_\_\_
- Meeting location \_\_\_\_\_
- Meeting time \_\_\_\_\_

### CONTACT INFORMATION

- Contact information for President (name, phone, email) \_\_\_\_\_
- Contact information for Associate (name, phone, email) \_\_\_\_\_
- Contact information for GO Team Liasion (name, phone, email) \_\_\_\_\_

### COMMUNICATIONS

- Club website url \_\_\_\_\_
- Club phone number \_\_\_\_\_
- Club email \_\_\_\_\_
- Council of Clubs email \_\_\_\_\_
- Contact information for Club Directory \_\_\_\_\_

## CERTIFICATIONS MADE WHEN CHARTERING

### Bylaws Requirements Certification

- I certify that the Club Bylaws have been reviewed to ensure that all SDCDP requirements are met and they do not conflict with the SDCDP Bylaws.

See [www.sddemocrats.org/bylaws](http://www.sddemocrats.org/bylaws) Article X Section 3 for the list of requirements for chartering

### Club Endorsements

- I understand that my club may only endorse registered Democrats.
- I understand that endorsements made by the club will be designated as such so as not to be construed as the official endorsement of the San Diego County or California Democratic Party.
- I understand that all Democratic candidates must be invited to our endorsement meetings where we are considering an endorsement in their race.

See [www.sddemocrats.org/bylaws](http://www.sddemocrats.org/bylaws) Article XIII Section 7 for requirements related to endorsements.

### Use of the term "Democratic"

- I understand that the term "Democratic", other than as part of the club name, shall be subject to the approval of the Executive Board when soliciting funds.

See [www.sddemocrats.org/policies](http://www.sddemocrats.org/policies) Section X. A. 3.

### Bylaws Changes During Charter

- I understand that if the club changes its Bylaws during the 2016 charter period, a new pdf copy of the Bylaws with an outline of the changes must be submitted to the Director of Clubs within 30 days and the charter is subject to review.

See [www.sddemocrats.org/policies](http://www.sddemocrats.org/policies) Section X. B.

## C. Sample Club Membership Application

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### Club Membership Application

New ( ) Renewal ( )

Date: \_\_\_\_\_

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Number(s): (H) \_\_\_\_\_ (W) \_\_\_\_\_ (C) \_\_\_\_\_

Dues are:

Individual \_\_\_\_\_

Family \_\_\_\_\_

Senior/Student \_\_\_\_\_

Angel \_\_\_\_\_

Please make your check payable to: \_\_\_\_\_

I am a registered Democrat: Yes ( ), No ( )

My family members are Democrats: Yes ( ), No ( )

The following are areas I would like to help with (you may check one or more):

( ) Political Action      ( ) Programs      ( ) Telephone      ( ) Computer

( ) Mailing      ( ) Refreshments      ( ) Publicity      ( ) Newsletter

( ) Fund Raising      ( ) Membership      ( ) Voter Registration      ( ) GoTeam

( ) Other: GOTV, \_\_\_\_\_

## D. Sample Letters

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### D.1 Welcome New Members Letter

#### LETTERHEAD

(Date)\_\_\_\_\_

(Name)\_\_\_\_\_

(Address)\_\_\_\_\_

Dear \_\_\_\_\_,

Welcome to the (club name) \_\_\_\_\_. We are extremely pleased that you have chosen to join our group.

We are dedicated to the support of Democratic Party principles and candidates. This is accomplished through a wide variety of social, educational, fund raising and political action activities.

We hope you will decide to become active in the club; I look forward to seeing you at meetings.

Please contact me if you have any questions, suggestions, or opinions. My home phone number is \_\_\_\_\_.

Sincerely,

\_\_\_\_\_

President/ Membership Director

## D.2 Press Release Format

### LETTERHEAD

(Date) Contact Person: (name) at: (phone number)

For immediate Release (or effective release date)

Headline

Body (double-spaced)

Quote for use in News Articles

#### GENERAL INFORMATION ON PRESS RELEASES

1. The contact person is the individual who will be contacted by editors and others receiving the press release for further information.
2. Always include the date to give the release a sense of timeliness and urgency. The headline should read like a newspaper headline.
3. To be effective press releases must sound newsworthy, not like an advertisement for your club.
4. Letterhead should be used when available.
5. Press releases should be kept to one page if possible, or a maximum of two.
6. Press releases should always be double-spaced.
7. A press release should mention the name of individuals in the text only for the purpose of being quoted or mentioned in an article.
8. In general, the editor should make the press release user-friendly by including all the information he/she will need to create a story from your release (include who, what, where, when, and why). The easier it is for the editor to read and use the press release, the more likely it is that your news will get published.

## E. Council of Clubs Mission Statement and Standing Rules

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The San Diego County Democratic Party Council of Clubs is an organization comprised of Democratic club presidents. Founded in the early 1980s, the purpose of the Council of Clubs is to offer an informal gathering of Democratic club presidents or their designated alternates to exchange information, share experience, and work on projects as the Council deems appropriate.

The Council of Clubs will work in cooperation with all other Democratic Party organizations, such as the California Democratic Party (CDP) and the San Diego County Democratic Party (SDCDP) to further the goals and ideals of the Democratic Party as a whole and to identify, develop and elect Democratic candidates.

1. The Council of Clubs (Council) is an informal, relaxed and friendly gathering whose purpose is to promote unity and camaraderie among club presidents. It will generally operate by consensus. When votes are conducted, voting will be by voice or show of hands. Robert's Rules of Order shall be the parliamentary authority.
2. Voting members of the Council shall be the presidents of clubs chartered by the SDCDP or their designated club representative and must be present to vote (one vote per club). The Director of Clubs may vote to break a tie. Presidents of non-chartered clubs are encouraged to attend and participate in meetings in a non-voting status.
3. The Council will meet on the third Saturday of each month at 9 a.m. unless changed by the Council. The Council does not meet in December.
4. The week prior to the meeting, each club is asked to compile a summary of their activities for the past and coming month which will be distributed to all clubs as a way of sharing information and ideas which is known as the "Written Report".
5. Each year, the Council selects a Club of the Year for the SDCDP's annual awards.
6. The Council will be a vehicle for official information exchange within all levels of the Democratic Party. Various organizations, candidates and elected officials may be invited to address the group.
7. The Council may work on special projects as deemed appropriate by a majority of voting members at any regular meeting.
8. Any action taken by the Council is advisory only and not binding on clubs.
9. The Director of the Council of Clubs is elected at the November meeting of even numbered years and after ratification of the SDCDP Central Committee, serves on the Executive Board of the Central Committee as the Director of Clubs for the same term as the Executive Board. The Council may remove the Director of Clubs by a sixty percent (60%) vote. A vote to remove the Director must be noticed to the Council no less than ten (10) days prior to the meeting at which the vote will be held.
10. The Director, if unable to attend a monthly meeting, may appoint a member to preside.

11. The Council may collect and expend funds as deemed appropriate by a majority vote of Presidents at a regular meeting. All assessments are voluntary. The treasury of the SDCDP may be utilized for banking purposes.
12. In order to take any action, one-third (1/3) of those eligible to vote must be in attendance.
13. These standing rules may be amended by a two-thirds (2/3) vote. Proposed amendments must be submitted no less than ten (10) days in advance and noticed to the Council seven (7) days in advance of the vote.

Adopted November 21, 2015

## F. Suggested Ground Rules for Effective Meetings

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While the President of each club is responsible for conducting orderly meetings and the Executive Board is responsible for removing any member who causes harm to the reputation and/or finances of the club in order to maintain their charter, it is important for all members to agree to help the club succeed by observing the following ground rules.

1. Only one person speaks at a time, no one will interrupt while someone is speaking.
2. Each person expresses his or her own views, rather than speaking for others or attributing motives to them.
3. Respect the groups' time and keep comments brief and to the point.
4. No personal attacks. Challenge ideas, not people.
5. Everyone agrees to make a strong effort to stay on track with the agenda and to move the deliberations forward.
6. Everyone will seek to focus on the merits of what is being said, making a good faith effort to understand the concerns of others. Questions of clarification are encouraged. Disparaging comments are discouraged.
7. Everyone will follow the "no surprises" rule. Concerns should be voiced when they arise, not later in the deliberations when a "surprise" objection is raised.
8. Each person will seek to identify options or proposals that represent shared interests, without minimizing legitimate disagreements. Each person agrees to do their best to take account of the interests of the group as a whole.
9. Each person reserves the right to disagree with any proposal and accepts responsibility for offering alternatives that accommodates their interests and the interests of others.

Club presidents may find it helpful to read Robert's New Rules of Order or one of the many quick reference books for running meetings.



## G. Club of the Year Selection Committee

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This committee consists of the current presidents of the past 5 Club of the Year. These clubs are not eligible for the award. Nominations will come from the committee members and the 4 area Vice-Presidents of the Central Committee, may offer suggestions, but will not participate in the final selection.

Past history shows that no club has won twice in less than 6 years. Knowing the past 5 winners will not be eligible, should encourage clubs that have been nominated in the past, but were not selected. Clubs that have won in the past are expected to maintain high standards, set a good example and offer help to the other clubs.

The assessment should address the description of the award: “has set an example for other clubs through innovative programs, community outreach, political influence, growth, and positive impact on its community.”

Each club can produce a year-end report that includes a checklist of objective criteria, including but not limited to:

- number of meetings held
- number of new members gained
- number of members renewed
- number of members at meetings
- number of GO Team members
- participation in voter registration
- type of programs and how received, include elected officials
- when last considered and or selected
- representation and participation at Council of Clubs, including written reports, providing programs, etc.

Using the guidelines and any other things that are relevant for the year, the committee should select the top choices and present these clubs to the Council of Clubs for final selection. Preferably by the Jan. meeting but usually no later than the Feb. meeting. The Roosevelt dinner, where the awards are presented, is usually in April. Check the dates for the current year. The SDCDP likes at least a month or more notice.

The candidate clubs will be informed and be allowed to make a 2-minute presentation prior to the vote. No secret ballots. If more than 2 clubs are nominated, one must get at least 50+% to win. If no first ballot winner, top 2 will go to a second ballot.

Adopted November 21, 2015  
Council of Clubs  
Added to Manual 10/28/2016