



Guidelines for LWVMA Studies

Approved by LWVMA, July 24, 2017

Study Committee Appointment

Study Scope

The LWVMA Board will adopt a detailed Study Scope based on the action and intent of Convention to adopt the new or updated study. The Board should choose at the beginning of a study between a consensus or concurrence process for the study, unless otherwise determined by the Convention delegates and depending on how simply the issues of the study may be presented to members. The Board should then also adopt a study Timeline (see Addendum 1) and criteria for what is considered consensus or concurrence for this particular study.

Consensus is not a simple majority, nor is it unanimity; rather it is the overall sense of the group and a judgment about whether member understanding and agreement have been achieved. Determining whether consensus has been achieved and how it should be expressed is the responsibility of the Board. In order to assure that the position statement reflects a broad consensus, the LWVMA will consider the number of Leagues participating, their geographic representation, and the unique demographic data of those Leagues that participate.

Study Committee Chair Appointment

The LWVMA President or Co-Presidents shall appoint a Board member as Chair of the study committee. Co-Chairs and/or vice-chairs could also be appointed with at least one being a Board member.

Study Committee Appointment

The Study Chair will announce, using the League Leaders' Update and other means, the study scope and invite members to apply for the study committee.

Members who volunteer will be asked to complete a questionnaire and submit a résumé (or list of relevant experience), writing sample, and the name of at least one reference from their local League officer or Steering Committee member. Applicants are welcome to include an additional reference if they so choose. LWVMA Members-at-Large should provide a reference for someone familiar with their relevant work.

The Study Chair and, depending on the number of applicants, at least one other Board member will examine materials submitted by the study applicants, interview the study applicants and their references, select the Study Committee, and recommend their appointment as the Study Committee to the Board. To provide some continuity, whoever interviews an applicant should also interview the applicant's references. The appointed Study Committee should be as neutral or as balanced as possible with members on all sides of the study issue. It should also include experts in the study subject (if available) and be as geographically balanced as conveniently



possible. The interviews will also help to guide where each individual member of the Study Committee can best contribute.

Conduct Study and Prepare Documents

Meetings

The Study Committee will meet periodically via audio or video conference call or in-person as is cost effective to conduct the study, prepare and approve all study documents, and generally oversee all aspects of presentation of the study to local Leagues.

Study Committee Operation

Any reports produced by the committee will be well-researched and based on data from valid sources. The Study Committee should work collegially and reach agreement about how the committee will operate. The materials that are produced by the Study Committee should be balanced and clear for member use, and should rely on resources that are reliable and verifiable, and/or produced after consulting with a balanced selection of experts who can share research with the study committee. If committee members lack training needed to evaluate materials from specialized disciplines, they should seek outside assistance.

Communication between the Study Committee and the Board through the Study Chair(s) will be ongoing, with feedback loops at every stage of the process to facilitate identification and solution of any problems. Brief periodic written summaries or minutes of the Study Committee will be shared with the Board. The Study Chair(s) will report directly to the Board at each meeting throughout the process. Any subcommittees will communicate regularly with the full committee.

Study Scope and Timeline

The Study Committee may review the Board adopted Study Scope and Timeline and recommend changes to the Board.

Subcommittees

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

Local League Study Committees

Local League boards are encouraged to appoint local study committees to implement and conduct the study in their local area. In addition, such local committees could be asked to gather data for the state study committee, plan and conduct general meetings or forums related to the study, and prepare and conduct local consensus or concurrence meetings.

Study Documents and Distribution

The Study Committee will prepare or select various study materials to be distributed to local Leagues. Such study materials may include articles, pro and con statements, data, website references, multimedia files, etc., with the purpose of making a thorough and balanced



presentation of all issues of the study and preparing League members for the consensus or concurrence process.

Leaders' Guide

The Study Committee will prepare a Leaders' Guide to help local Leagues conduct the study process in their communities. The guide may include an outline of the study, study scope, study timeline, advice for League boards, a guide for discussion leaders, tips for consensus or concurrence meetings, and the consensus or concurrence questions.

Media Formats and Channels

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

Consensus or Concurrence

Consensus Questions

If the Board has ordered a consensus process, then the Study Committee will propose consensus questions to the Board with adequate time for the Board to consider and adopt them. The writing of the consensus questions is a critical task in the study process, so the Study Committee may want to allow time for some negotiation or for the Board to consider the questions more than once.

Consensus questions must be framed so that they are neutral and not intended to lead to a conclusion. Each consensus question should be limited to one topic or idea to ensure that no confusion exists as to the intent of the answer. The questions should allow for discussion during consensus meetings, but ambiguity should be avoided. Each consensus question should allow for both discrete answers that can be easily tallied and longer responses where Leagues may explain their answers, the degree to which consensus was reached, or any difficulties that they encountered in their consensus meetings.

The consensus questions should be tested with small focus groups of members who are not members of the Study Committee. It's important to plan time for this into the original schedule.

Concurrence Statement

If the Board has ordered a concurrence process, then the Study Committee will propose a concurrence statement to the Board. The proposed concurrence must be based on an active state or local League position, and the Study Committee would provide the title and scope of the position they propose for concurrence, the name of the League that did the original study and the location (usually a URL) of the position and, hopefully, the study materials. A concurrence statement is a proposed statement of position, based on the study materials, on which Leagues or members may only agree or disagree. Because the wording may be adopted as a final position



statement, the Study Committee should consider all the guidelines below for writing a statement of position. The proposed concurrence statement should then be submitted to the Board, the same as for consensus questions above. (This is not the same as a concurrence statement adopted by Convention, which must be based on an existing study and position of another League.)

Consensus or Concurrence Meetings

All Leagues are encouraged to participate in the study, to form a local study committee, to hold general meetings for members and the public about the study, to hold consensus or concurrence meetings for members, and to finally report the results. See the definition of consensus in the first section of this guideline.

Consensus or Concurrence Meeting Reports

The Study Committee will prepare a form for Leagues to enter their consensus or concurrence meeting reports. The report should request that local Leagues provide the number of League members who participated in the consensus or concurrence meeting. The Board or the Study Committee will also set a deadline for meeting reports.

Member Agreement and Position Adoption

Determination of Consensus

If a consensus process was used for the study, then the Study Committee, based on consensus meeting reports and the consensus criteria adopted by the Board, will decide if consensus has been reached, and if so, will write a draft position statement and propose it to the Board. Alternatively, the Board may appoint a Member Agreement Committee to perform this function, if the Board deems it necessary. Such committee may be composed of Board members and/or study committee members.

Guidelines for Writing Position Statements

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

Position Adoption

After receiving the recommendations of the Study Committee or the Member Agreement Committee, the Board will review and vote whether to recommend the new or updated League position to the membership.

If recommended for a vote at convention, the Board will send the recommended position to local League presidents/primary contacts and to members at-large at least six weeks prior to the opening date of convention. A majority vote of delegates present at convention is required to adopt new positions based on member study.



If the position is adopted by convention, the Board will inform the membership of the new position and include it in the next edition of *Where We Stand*. The Board will also issue a press release to the public.



Addendum 1: Generic Study Timeline

Time Required	Action
1 month	Board approves initial study scope, timeline and consensus or concurrence criteria.
1 month	Study chair invites study committee applications.
1 month	Study chair and other Board members interview applicants and references.
1 week	Full Board approves study committee appointments.
1 month	Study committee begins meeting, reviews study scope and timeline, and may recommend changes to Board.
Several months	Study committee prepares or selects study materials, a Leader’s Guide, etc., and posts on website.
Several months	Local Leagues may form study committees, examine study materials, hold public meetings, etc.
1 or 2 months	Study committee proposes consensus or concurrence questions to the Board for revision and/or approval.
A few months	Local Leagues hold consensus or concurrence meetings.
A firm date certain	Deadline for consensus or concurrence reports to be submitted.
1 month	The study committee (or Member Agreement Committee) decides if consensus or concurrence was reached, and if so, proposes a new position statement to the Board.
1 or 2 months	New position is circulated to membership, and adopted by Convention delegates.



Addendum 2: Application for LWVMA Study Committee



Application for LWVMA Study Committee

A study of the Massachusetts Ballot Question Process was recommended by the state board and adopted by delegates at the 2017 LWVMA Convention in April. **The LWVMA board will appoint a Study Committee** to focus on this issue with a goal to finish the work over the next two years.

This study will examine the process for ballot questions in Massachusetts. The scope of the study is to review the laws and regulations that govern the ballot question process, consider the consequences of current law based on past ballot questions, and propose concrete next steps that LWVMA could take to enact change, if the study results in recommended change.

If you are interested in participating in this Ballot Question Process Study Committee, please complete the application form and submit electronically by June 30.

Applicants will:

1. Submit a writing sample (any length, topic, purpose)
2. Submit a resume, CV, or list of relevant experience
3. Submit at least one reference

Persons appointed to the Study Committee will:

1. Be members of the League
2. Participate in a phone interview
3. Have an interest in the topic and open mind about issues related to the topic
4. Have research, writing and/or editing experience
5. Have a proven ability to work within a team

Once appointed the following procedures apply:

1. The Committee will meet generally by phone and email.
2. The LWVMA chair of the Committee or her/his designee will provide an agenda for each Committee meeting.
3. A record will be kept of meetings of the Committee by the chair or her/his designee.
4. A timeline for the study will be developed and reported to the board.
5. Written materials prepared by the Committee will be reviewed for substance and accuracy by the Committee members.
6. Communication beyond the Committee and the board regarding the study should be in consultation with the LWVMA board.

Individual members of the Committee will be responsible for:

1. Participating in all meetings (by phone and email) of the Committee unless excused
2. Agreeing to the goals and timeline of the Committee
3. Agreeing not to release any written material prepared by the Committee (unless designated to do so by the chair)
4. Meeting Committee deadlines for research and delivery of written material



5. Ensuring the substantive accuracy of the text and all citations of written materials

Questions for Applicant (1-5)

1. I have read the Study Committee requirements and agree to abide by them. (Check "yes" to indicate your agreement.)

2. Contact Information

First name, last name, phone, address, email, League

3. Describe why you are interested in working on this study topic.

4. Describe the experience and knowledge that you will provide as a member of the Committee.

5. How do you like to work as part of a team in getting a project completed? Please provide examples.

Required Reference (Questions 6 & 7)

Please use question 6 for your first reference and question 7 for your (optional) second reference.

6. Please list a reference with knowledge of your work (should be a League leader with whom you have worked in the past).

First name, last Name, title, phone, address, email

7. (Optional) Please provide one additional reference with knowledge of your work.

Required Documents (Questions 8 & 9)

8. Please provide a writing sample.

9. Please attach a copy of your resume, CV, or list of relevant experience.

10. I have reviewed my answers I attest that the information I have submitted is accurate.
(Check "yes" to indicate your agreement.)

END OF APPLICATION