

**HANDBOOK FOR WRITING  
A LEAGUE OF WOMEN VOTERS  
STUDY IN UTAH**

Updated by LWVUT and LWVSL  
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-2 of 11-

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Original "Handbook for Writing a League of Women Voters Study in Utah" was published in 1983.

## **HANDBOOK PURPOSE**

Study and actions on governmental issues are the goals of the League of Women Voters. Each year the state League as well as local Leagues develops a program which includes study topics - issues that individual Leagues, as well as the state League, have chosen as a priority for the current year. Each League's program arises from the suggestions of members and is adopted each year at the state's annual convention or at the local League's annual meeting.

Action may be taken only in those areas where there is a formalized position statement resulting from a study process, incorporating member understanding and agreement. All position statements must be re-adopted each year by League members at their annual meeting to remain on the program of issues for study and action.

The purpose of this Handbook is to provide guidance to boards, study committees and membership on League studies. Once a study topic has been approved as part of a League's annual program, a study chair is appointed by the board. The chair's appointed study committee collects, tabulates, writes and insures review and discussion on the identified topic. The end product is usually in the form of a published document that is objective, clear, concise, and detailed as necessary for understanding.

Each level of the League conducts studies. The League of Women Voters of Utah is responsible for determining studies and subsequent actions on state issues; local Leagues are responsible for local issues.

## **STUDY GOALS**

The goals of a study are also the goals of the League of Women Voters in general: information, education and action. How well a study serves as a tool for attaining these goals depends on the quality of its content, the clarity and objectivity with which the information is presented, and the extent to which the membership is involved, not only in originally defining the issues, but in subsequent discussions.

To serve as an informed guidebook to the subject, the study must be well organized in a consistent format, so that readers and discussion groups can easily follow its development. Upon completion of the written document, the study committee should determine whether all possible pertinent questions from a reader new to the subject have been defined, explored, and explained clearly.

The objective of a study is to ultimately define a position statement. Studies can be adopted through consensus or concurrence. The technique used in the League for reaching member agreement is consensus, a technique of the League for reaching member agreement through group discussion, obtaining an overall sense of the group. The concurrence process is the

adoption of an existing study and position of another League.

## **THE STUDY PROCESS: A COOPERATIVE EFFORT**

The successful completion of a study depends on a close, continuing collaboration among several groups and individuals within each league.

### **Board Responsibilities**

The board must ensure that a study chair and committee are assigned and given clear directives regarding the scope of the study as stated in the program adopted at the annual meeting/convention.

As soon as possible after adoption of a study as a part of the annual program, the board should develop a calendar in cooperation with the study chair, taking into account the magnitude of the research, the likely number of meetings needed, subsequent discussions by the members, and the best way to fit the study process into the rest of the League program.

The board should ensure they receive regular progress reports from the study chair.

The board will review and approve consensus questions submitted by the study committee, and revise and finalize the study committee's draft of a position statement.

The board may designate a board member to serve as an ex officio member of the study committee. By attending most of the meetings, she can serve as a sounding board and enable members to clarify their thinking as consensus questions or conclusions are being formulated.

### **Study Chair Responsibilities**

This section outlines the major responsibilities of the study chair including organizing the study committee, planning the work, procuring research materials, monitoring the work, communication updates and post-study discussion and distribution processes.

#### **1. Organize the Study Committee**

Make Up and Number: The League board and the study committee chair will recruit committee members. A good study committee should reflect a broad spectrum of the membership. If the topic is controversial, all shades of opinion should be represented to assure a well balanced, objective report. Committee size can range in number; subcommittees can and should be considered if there are many interested members.

For a state study, the committee should be composed of members from as many local Leagues as possible, assuring statewide representation. This provides a channel of communication between

the local Leagues and the state League.

Skills: The committee should include members who can do research, members who are comfortable conducting interviews with topical experts, and members who can write. If the study is on a fairly technical topic, such as hazardous waste, taxation or legal issues, it is helpful to have a trained resource person, either as a committee member or as a consultant.

Non-members may serve on a League study committee only in a consultative role. Resources to recruit study committee members include local Leagues' membership committees, past study members, unit discussion leaders on related topics or delegates who participated in past program making processes at convention or annual meeting.

Review: The study chair together with the League president appoints an editing committee, ideally composed of an editing chair and three members of the League. The editing committee is responsible for approving the organization and style of the study. The committee should ensure that the tone and viewpoint of the study are objective and nonpartisan to conform to League standards. To ensure clarity and understanding, it is helpful to have some members of the editing committee who are not familiar with the topic.

## **2. Plan the Work**

Budget for Study Costs: The responsible League treasurer should be consulted by the study chair, prior to the first committee meeting, regarding any funds allocated for purchase of hard copy references, long-distance phone calls, printing, envelopes and postage if hard copies are to be provided to an established list of recipients. Be sure to include mailing to those members without email. If a grant or a study sponsor is anticipated, this should also be included in the proposed study budget for the treasurer's review and approval. League Education Funds may be used to produce a League study.

Task Assignments: Utilizing the board's direction regarding the study's scope, the first meeting of the committee should be used to outline tasks subdivided into manageable assignments. The League's public relations/communications director should also be included in the first meeting to plan for media updates and eventual release of the completed study. Outlining of committee tasks can be by subheadings, by different types of research, or any manner appropriate to the topic.

Identify and Utilize Skills: Any interest on the part of individual members in certain aspects of the study is identified at the first committee meeting to make the best use of member skills and experience. Every committee member should assume responsibility for some part of the project – if only to recruit other members whose special talents could prove useful.

Monitoring the Work through an Assignment and Meeting Calendar: At the first study committee meeting, the study chair in cooperation with her committee establishes a calendar of

assignment due dates as well as dates for future committee meetings.

Committee meetings should be planned to serve as deadlines for completing certain parts of the work and to allow members to report what they have learned. The initial framework may need to be adjusted and emphasis on some aspects of the study may shift, as everyone becomes more familiar with the topic. Subsequent committee meetings should include a review of assignments completed and tasks due by the next committee meeting.

### **3. Procure Research Materials**

Hard Copies: Publications not available locally should be ordered promptly in consultation with the League treasurer.

Interviews: If interviews are to be a part of the information gathering process, the chair should use the first committee meeting to discuss who is to be interviewed, what the questions will cover and which committee members are to conduct the interviews. Copies of correspondence or email to prospective interviewees explaining the purpose of the study and confirming appointment times should be copied to the chair.

Internet Resources: The internet can be useful to get quick access to research materials. Many reliable organizations, including the League of Women Voters, make their publications available online. Information from sources that exist only online (a web page, for example) may be more current than published sources, but if such information is cited in the study, the source should be carefully referenced. Record the author, web page name, date the information was published on the web page, URL of the website and the date that the information was accessed.

### **4. Study Status Updates**

Board and Public Relations Coordination: Interest in the study topic, demonstrated by the membership in suggesting and then adopting the study during the program planning process, is kept alive by regular updates. The study chair makes routine progress reports at every board meeting, provides articles/updates to the Utah Voter newsletter editor and regular articles to the membership. The public relations/communications director can also use those updates for release in the media and for communication to other organizations whose interests coincide with those of the League on a given topic.

### **5. Post Study Completion Discussion Processes**

An important part of the study process is to provide information to members that will stimulate discussion, develop an appreciation of the intricacies of public policy issues and ultimately lead to construction of a League position statement. This is done through several discussion/questioning processes.

Discussion questions and meetings go beyond a simple review of material in the study text. Their purpose is to stimulate an exchange of ideas at smaller local League group or unit meetings. Prior to the scheduling of any small group/unit meetings, select study committee members assemble a study briefing outline. As assigned or upon request the study briefing team is responsible for educating discussion leaders on the scope and content of the study. These briefings can include topical questions, Powerpoint presentations, supplemental handouts, etc., for unit leaders to use to stimulate discussion and understanding of the study.

Consensus meetings are used for careful deliberation, leading to a meaningful consensus of League members. From consensus question responses, League position statements are devised which in turn provide the foundation for League action. If the study committee poses only open-ended questions, each unit meeting may give different answers and there will be no consensus. Instead of what changes would you propose, it is better to ask which of the following changes do you favor, listing some possibilities, including “other” for those who might disagree or to allow for some original ideas. Consensus questions that elicit a Yes or No answer are also easier to tabulate.

### **Study Committee Members Responsibilities**

Each member must fulfill responsibilities assumed at the first committee meeting, or notify the chair in plenty of time if unable to do so for any reason. Members should bring or send a clearly written report to committee meetings.

Study committee members should think about how the emerging study addresses the assigned focus.

The committee will also decide on a title, cover design ,illustrations and graphs to clarify complicated material.

## **STUDY CONTENT AND FORMAT**

Each study should follow the format best designed to deal with the particular subject.

**Statement of Purpose:** The reason for the study, the areas of focus and the anticipated conclusion or result of the study can be presented as a preamble, an introduction, or as the actual beginning of the main text.

**Consistency:** Much time and duplication of effort can be saved in the editing process if the draft submitted to the editing committee is well organized and follows Standard English usage. Consistency in format, capitalization, placement of headings and margins is mandatory.

Abbreviated words and acronyms should be completely written out the first time they are used. The complete term should be followed by its abbreviation or acronym in parentheses. Thereafter, the shorter term may be used alone. Acronyms should be explained a second time in a Glossary at the end of the study.

Persons referred to in the text must be clearly identified the first time they are cited. Their complete name, official title or description and any other relevant information should be given. Thereafter, the person may be referred to as Mr., or Ms. X (or by title, such as Dr., President, Governor, Senator, Representative, etc). Agencies or organizations should be handled similarly.

Footnotes should be used with discretion. They may either cite the source of a statement or be explanatory in nature. Sources of information including written information and interviews should always be contained in a Sources list at the end of the study. Explanations might be better incorporated in the main text, since readers often skip over notes and may miss important information. When footnotes are used, they may be placed at the bottom of the page, or collected in a separate section at the end of the study, but never both in a single publication. Footnotes at the bottom of the page are more immediately accessible to the reader.

The nature of the study will dictate whether other features, such as a Table of Contents, a Glossary of technical terms and acronyms, or maps and figures should be incorporated.

**Executive Summary:** An Executive Summary at the beginning of the study is a useful tool for readers. The main points of the study can be repeated briefly to provide a focus for the reader before embarking on the discussion and consensus processes. Presentation of formal conclusions of a factual nature is not mandatory but may be helpful. Proposed position statements should not be included in a study.

**Acknowledgements:** At the end of the study, a list of acknowledgements should include all persons who were interviewed in the research process if they are willing to be quoted. Organizations or agencies should be listed, along with the names of individuals who actually rendered the assistance. Job titles should accompany complete names of persons cited.

In addition to study committee members, all volunteers who assisted in the preparation of the study in any way at all, such as the editing committee, graphic artists and office volunteers should be acknowledged. The particular League that did the study should be identified.

For a study supported through a tax-deductible Education Fund, the grant must be (and the donor may be) acknowledged on the title or cover page.

**Discussion Questions:** Discussion questions should go beyond a simple review of material in the text. Their purpose is to stimulate an exchange of ideas at unit meetings. They should be based on information in the study itself, plus any supplemental information provided at briefings

-9 of 11-

for discussion leaders.

**Consensus Questions:** A separate sheet of consensus and discussion questions needed to reach consensus should be included with studies distributed to League members.

### **TIMELINE SUMMARY**

Immediately after adoption of the study item, the chair and the board must construct a calendar that determines when the study will be ready for publication and distribution. Then the study chair can set a more detailed timeline.

The board president will immediately inform the local Leagues of the publication date. She needs to remind them to schedule their unit discussions at least 3 weeks after the publication date, to give members time to read the study and local boards time to schedule unit briefings.

Wisdom dictates pessimism in this scheduling process. Not only will Murphy's Law be operating ("Anything that can go wrong, will.") but a group of volunteers, functioning on a shoestring budget in minimally equipped offices of necessity runs into more than the usual complications. Fortunately Leaguers are resourceful and stubborn - but it is best to build some flexibility into the schedule.

#### **The First Committee Meeting**

The first committee meeting should be held as soon as possible after the study committee has been appointed. If possible, this should be at least six months prior to the expected publication date. The number and frequency of subsequent meetings will vary with the nature and scope of the study.

All committee members, upon being assigned, should be provided access to this handbook to read before the first committee meeting.

#### **C-Day and Counting**

C-Day in this case means Completion Day: the day the completed study is mailed (email) from the office.

**3 Months before C-Day:** All materials should be in the hands of the study chair and writer(s) who will begin compiling the first draft. The draft should be completed by the next month.

**2 Months before C-Day:** A legible and well organized draft has been completed. The last committee meeting to review the draft and write discussion and consensus question is held.

**2 - 1 ½ Months Before C-Day:**

During these 2 weeks:

Writer(s) revise draft on basis of committee comments.

Committee chair submits consensus questions to board for approval.

The study chair together with the League president selects an editing committee. The editing committee ideally consists of 3 veteran Leaguers. Its main job is to make sure the tone and viewpoint of the study conform to League standards. The editing committee should not need to deal with organization, grammar or other copy-editing tasks. The editing committee can decide whether it wants to meet or read separately and submit comments online to the study committee.

Hard copies will be produced by professional printing services. The LWVUT office manager can provide contact information.

**1 ½ Months Before C-Day:**

The study committee chair provides an electronic copy and/or printed copy of the final draft to each member of the editing committee and allows two weeks for them to complete the job. Also, the chair sends copies to people who were interviewed or otherwise contributed information, and requests a check for accuracy. Only the portion of the study in which they were involved needs to be sent at this time.

**1 Month - 2 Weeks Before C-Day:**

During the first two weeks of this time period, the writer(s) incorporate the editing committee's and interviewees' comments into the draft and prepare a clean copy. This clean copy must be proofread by the chair and one other person.

**2 Weeks Before C-Day:**

The committee chair arranges for the email distribution, printing and hard copy distribution of the study.

**After C-Day**

In Leagues where a briefing prior to unit meetings is customary, briefings should take place immediately after the publication date (C-Day). The nature of the study will determine whether it would be appropriate and helpful to have outside speakers at a briefing to provide supplemental information or differing viewpoints. Guidelines should be distributed to discussion leaders should be distributed.

## **PUBLICATION AND DISTRIBUTION**

Electronic or hard copies of the study and consensus questions will be sent to all League members at least 2 weeks before scheduled consensus meetings. The study committee recommends to the board additional distribution for the study indicating whether copies to be distributed should be electronic or printed and are responsible for that distribution task.

The study committee sends thank-you notes and complimentary electronic or printed copies of the study to persons who were interviewed and who donated funds or in-kind support.

After consensus meetings, the study committee collates and summarizes the scribes' reports, writes a position statement on the basis of the consensus summary, and submits it to the board for official adoption.

The board adopts a position statement at a board meeting and records the position in Impacts on Utah Issues (the state Leagues's permanent record of its positions) or the local League's permanent record.

The public relations/communications director informs the membership, donors and the public of the consensus results and position statement through an article in the Voter, letters and press releases.

A copy of the study, resulting position, and distribution list is placed in the League files.