



**DEMOCRATS ABROAD**

**Handbook**

**Guidelines**

**&**

**Resources**

**May 2012**

[www.democratsabroad.org](http://www.democratsabroad.org)



## Welcome!

May 2012

We're pleased to present the latest Democrats Abroad Handbook. This is a living document, with the latest version held on our website.

For Committees in-information, this should be your first stop for getting your group up and running. For existing Country Committees, this handbook should be an excellent resource to provide to new board members. For those wanting to get more involved, this should provide insight into the workings of DA and the different areas you can participate in.

Updates to this Handbook can be found at [www.democratsabroad.org/handbook](http://www.democratsabroad.org/handbook) in the International Leadership group. Additionally this Handbook can be found under "My Groups" - "DPCA Voting Members" - "Group Resources" - "DA Handbook".

By sharing our best practices we intend to ensure we are all in synch - in compliance - and energized! Suggestions for improvements can be made to a member of our Best Practices Committee or our Executive Director [[ED@democratsabroad.org](mailto:ED@democratsabroad.org)] or our International Vice Chair [[vice-chair@democratsabroad.org](mailto:vice-chair@democratsabroad.org)].

Sincere thanks to everyone around the world who has helped to write, compile, verify, edit and produce this current version and its precursors.

With best wishes for 2012,

Vicki Hansen  
International Vice-Chair



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## The Democrats Abroad Online Handbook, at [www.democratsabroad.org](http://www.democratsabroad.org)

The online resources associated with this handbook are described in the appropriate sections. Throughout the text, wherever a mentioned link is listed in the Democrats Abroad Online Handbook, you will see a QR code in the right hand margin. The code will take you to the main page of the Online Handbook: <http://www.democratsabroad.org/handbook>



### Quick Reference for DPCA Contacts

**DPCA Executive Committee** (see also [www.democratsabroad.org/executive+committee](http://www.democratsabroad.org/executive+committee))

International Chair: Ken Sherman, Canada	<a href="mailto:chair@democratsabroad.org">chair@democratsabroad.org</a>
International Vice-Chair: Vicki Hansen-Thackray, Luxembourg	<a href="mailto:vice-chair@democratsabroad.org">vice-chair@democratsabroad.org</a>
International Secretary: Lou Hureston, South Africa	<a href="mailto:secretary@democratsabroad.org">secretary@democratsabroad.org</a>
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Regional Vice Chair (RVC) for the Americas: John Chudy, Guatemala	<a href="mailto:mayadems@yahoo.com">mayadems@yahoo.com</a>
RVC for Asia-Pacific: Albert Kang, Republic of Korea	<a href="mailto:rvc-ap@democratsabroad.org">rvc-ap@democratsabroad.org</a>
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## 1.1 About Democrats Abroad

Democrats Abroad is the official Democratic Party organization for the millions of Americans living outside the United States. We work to advance the principles of our Party by spreading the Democratic message to Americans abroad and encouraging them to vote for Democratic candidates back home.

Democrats Abroad has committees throughout Europe, the Americas, the Middle East, Africa, Asia, and the Pacific Islands. These Country Committees keep Americans abroad informed of their rights and help them participate in the U.S. political process. A small support office is maintained in Washington, D.C at the DNC Headquarters.

Democrats Abroad is recognized as a “state” Party by the Democratic National Committee (DNC) and is represented on the DNC by eight voting members (the International Chair and International Vice-Chair and six other elected DNC members), as well as at the quadrennial Democratic National Convention.

For the purposes of conducting business, Democrats Abroad is an unincorporated political association organized and operating under the Uniform Unincorporated Nonprofit Association Act of 2000, D.C. Code §§ 29-971.01 et seq. Democrats Abroad’s principal place of business is the District of Columbia.

**The DPCA:** The governing body of Democrats Abroad is the Democratic Party Committee Abroad (DPCA), which oversees Democrats Abroad’s activities. To avoid confusion between local committees and the international body, we refer to our international body as the DPCA, but the DPCA’s parts are known collectively as Democrats Abroad by the general public and media.

The DPCA is comprised of the Chair and Vice Chair of each Country Committee, the country committees’ respective Voting Representatives (if any), and the elected international officers of the DPCA (International Chair, International Vice Chair, Secretary, Treasurer, Counsel, Regional Vice Chairs), as well as the six other representatives of Democrats Abroad to the DNC.

Since our founding in 1964, Democrats Abroad has been very active on the national and international scene. Among its achievements, Democrats Abroad has been instrumental in:

- Securing voting rights for US citizens abroad through the Overseas Citizens Voting Rights Act of 1975.
- Obtaining passage of the Uniformed and Overseas Citizens Absentee Voting Act in 1986.
- Making sure every vote counts and is counted; furthering voting reform through the Emergency Committee to Reform Overseas Voting, created in November 2000 by Democrats Abroad. The Emergency Committee successfully lobbied Congress for improvements in the Help America Vote Act.
- Initiating the Federal Write-In Absentee Ballot, which allows voters to cast ballots when the absentee ballots have not arrived in time from their home states.
- Defending the rights of Americans living and working abroad by preventing the loss of their U.S. citizenship.
- Ensuring easier transmission of American citizenship to children born abroad.



- Fighting for Social Security and Medicare coverage for eligible Americans abroad.
- Fighting to avoid double taxation of Americans abroad by defending the foreign earned income tax exclusion (Section 911) and obtaining fairer treatment of U.S. taxpayers residing abroad.
- Creating firsthand contact with presidential candidates through conference calls with Democrats Abroad members living in Europe, the Americas and Asia.
- Helping to register voters by the thousand during the first worldwide Overseas Voter Weekend in 2004.
- Ensuring that voting forms were reprinted by the Federal Voting Assistance Program to meet the increased demand during the 2004 presidential election.
- Working to maximize the overseas vote; the result was a dramatic increase in overseas voter participation, especially thanks to the creation of [www.overseasvote2004.com](http://www.overseasvote2004.com), [www.overseasvote.com](http://www.overseasvote.com), and [www.tellanamericantovote.com](http://www.tellanamericantovote.com) in 2004. Our role in online, overseas voter registration continues through [www.votefromabroad.org](http://www.votefromabroad.org).
- Successfully removing restrictions on access to the Federal Voting Assistance Program's website, [www.fvap.gov](http://www.fvap.gov), by overseas Internet providers.
- Tracking and refuting illegal voting requirements (such as the LA County imposition in 2004 of an ID requirement for overseas voters).
- Ensuring that accurate and helpful information is available to Voting Assistance Officers and embassies and consulates through a network of DPCA Consular Liaisons.
- Working for the amendment of the federal FBAR and FATCA legislation, immigration policies for spouses of US citizens, and many other issues affecting Americans living abroad.

## 1.2 Forming a Country Committee: Step-by-Step Guidelines

**Step One:** Throughout this process, you should work hand-in-hand with your Regional Vice Chair, so make contact immediately. Your first step will be to hold a meeting with some core supporters to discuss how to find like-minded Americans. At this meeting, draft a schedule of what you hope to achieve over the next six months. Notify the DPCA Executive Director, so that the lead organizer can be added to the relevant contact lists for members of the DPCA. You will need to complete the Contact Information Form (see Appendix B1). The core organizers should be added to the DPCA-Leadership e-mail discussion group (see Section 2.2 and Appendix E5).

**Step Two:** There are two different types of committees: full committees (50 or more members) and non-voting committees (less than 50 members). Full committees have met their election, publicity, and membership requirements, and have adopted bylaws. See Article 5 of the DPCA Charter (available online) for the details of those requirements. All membership lists must be maintained in the DPCA database; a member of your committee should have access to the database for your country at some point in this process.



- Step Three:** Draw up your bylaws. The model bylaws approved by the DPCA Executive Committee can be found in Appendix B4.
- Step Four:** Schedule a general meeting to vote on bylaws and to elect officers. Publicize this event. Request via the International Chair that details of this meeting be posted on the Democrats Abroad website ([www.democratsabroad.org](http://www.democratsabroad.org)). Copies of print and other publicity must also be sent to the International Chair.
- Step Five:** Elect officers. Remember that there must be gender balance in accordance with the bylaws of the Democratic National Committee: the Chair and Vice Chair must be of the opposite sex. Within the Democratic Party, all voting must be public rather than secret: this means voting by show of hands, voice vote or *signed* ballot. (These are Party rules!) See the model election guidelines in Appendix E1.
- Report the results of the election to the International Secretary. You must submit signed minutes of the meeting. A copy of the approved bylaws must also be forwarded to the International Secretary. The DPCA will then have to vote to approve admission of the local committee based on the documents submitted by it.
- Assign database administration rights to appropriate officers, and have them sign data confidentiality agreements.
- Step Six:** Build momentum by scheduling regular meetings, communicating with one another, and holding voter registration and informational events and forums of various kinds.
- Step Seven:** Come join us at international and regional meetings — you'll leave with lots of great ideas and helpful contacts. It will give you a lot more impetus to keep going, knowing that you are not alone.
- Step Eight:** Make sure you meet certain compliance requirements, such as certifying membership as of December 31 each year to the International Chair. (See Section 1.3: Maintaining Country Committee Compliance, below.)
- Step Nine:** Ensure your committee is always in compliance with party rules and not conducting activity that would require it to register with the US Federal Election Commission (FEC). Of course, your committee must never violate US or local law.
- Step Ten:** Hold elections every 2 years following Model Election Guidelines, available in the appendices.

And, of course, let the DPCA officers, your Regional Vice Chair, and the Executive Director know if there is anything we can do to help make all of this any easier. That, after all, is what we are here for.

See also Appendix B2: Jump-Start a Committee and Appendix B3: First Step, The Organizational Meeting.

### 1.3 Maintaining Country Committee Compliance

In accordance with the Democratic Party Committee Abroad Charter, the following documents must be provided by each Country Committee, in order to maintain compliance:

**COPY OF BYLAWS & MINUTES:** Every January, Country Committees (CCs) must submit copies of any amendments to Bylaws adopted and minutes of election meetings (including complete contact information for officers) for the previous year, attested to by the Country Committee Secretary.

**MEMBERSHIP:** Further, the Country Committee Chair will forward to the International Chair, by January 31 of every year, a complete membership list that includes the names and addresses in order to certify that committee's membership. This certification must be countersigned by the Committee's Secretary or Treasurer.

**MEETING ATTENDANCE:** Chairs and Vice-Chairs of Country Committees and committees-in-information, the lead organizers of start-up committees, DNC members, Regional Vice-Chairs, and the international officers and staff of the DPCA are invited to the meetings of the Democratic Party Committee Abroad. Any DPCA member who does not attend three consecutive meetings will lose his or her membership. Note that attendance by any DPCA member of a Country Committee counts as attendance for all members from that Country Committee (Charter Section 2.4). In effect, each Country Committee should send someone to every meeting. This may be done by telephone or electronically.

Please note that giving one's vote to another DPCA member by proxy (see the DPCA Charter) does not satisfy this requirement. Telephonic or video-conference attendance typically counts towards this requirement, and as technology changes faster than the Charter, do check with DPCA International Counsel if in question.

**THE FIELD PLAN:** The Executive Committee has ordained that, in the first two months of each year, Country Committees submit a Field Plan to the International Executive Committee. In 2012, the Field Plans were due on February 15<sup>th</sup>. The Chapters of Country Committees (where they exist) are requested to submit Field Plans to their Country Committees as well. Templates for the Field Plan and sample Field Plans are available through the Online Handbook.



A Country Committee's Field Plan can be given to planners and elected Democrats from the DNC, Congressional offices, or the White House to familiarize them with the local Democrats Abroad organization. This is crucial for planning visits for prominent Democrats, who may be able to attend an event in your country as a result.

The Field Plans are also used to consolidate and analyze the activities of Country Committees. In the past, the International Secretary has used Field Plans to develop metrics (often with surprising results). The Best Practices Committee may review Field Plans to find models for events and procedures to recommend to other Country Committees. Since all Field Plans are available on [democratsabroad.org](http://democratsabroad.org), Country Committee leaders can find information and inspiration from reviewing the practices of other local organizations.

The data you will need to complete your Field Plan include:

- Certified membership total; Members without or opted-out email; Members without voting state
- Estimated number of Americans in country; Concentrations of Americans;
- English-language media outlets; Other local organizations for Americans
- Funds raised for the DPCA and for the CC; Number of DPCA Sustaining Donors
- Accomplishments of the prior year; Schedule of events for the upcoming year
- Goals for the Upcoming Year (Specific, Measurable, Attainable, Realistic, Timely)

## 1.4 Playing by the Rules: Permitted and Non-Permitted Activities

The DPCA is a subordinate committee of the Democratic National Committee. As such it is subject to the same legal restrictions that govern the DNC. Anyone purporting to act for Democrats Abroad (the common name of the DPCA and the Country Committees) must abide by these restrictions. Below is a summary of some of the more important rules.

In order to ensure that an activity is not prohibited it is important to consult regularly with the country committee counsel, International Counsel, and the Executive Committee.

This summary is intended to provide a basic outline on the rules governing the activities of Democrats Abroad. It is not intended to provide detailed guidance on any specific activity that a Country Committee may consider.

- 1. No contributions or donations from non-US nationals.** No one acting on behalf of Democrats Abroad may solicit or accept anything of value from a non-US citizen. This prohibition applies to in-kind donations including discounted food or rental space not available to the general public. Even reimbursed personal spending by a non-US national is prohibited. Any contribution from an US citizen with a non-US spouse must come from the funds of the US citizen.
- 2. Volunteer activity by non-US nationals.** A non-US citizen may volunteer his or her uncompensated services (for example, stuffing envelopes) to a Country Committee. If the services result in the production of an item of value for example, a piece of art, the Country Committee may not accept that item.
- 3. No corporate or labor union contributions.** No one acting on behalf of Democrats Abroad may solicit or accept anything of value from a corporation or labor union regardless of where the organization is domiciled or incorporated.
- 4. No public communications promoting a Federal candidate.** Only the DPCA may pay for public communications including newspapers, television, radio, direct mail of over 500 pieces, and phone banks making over 500 similar calls that promote, support, attack, or oppose a Federal candidate or political party. (See Point 10. Also see Point 6 for an exception regarding one's own members.) Country committees may not purchase public political advertising that mentions a Federal candidate or promotes the Democratic Party. One very limited exception would be advertising directed exclusively at the recruitment of new members. Paid internet activity now falls within the definition of public communications, and thus requires FEC compliance.
- 5. E-mail and free postings on the Internet are not public communications.** Individuals and groups, including Country Committees, may freely use the Internet (provided it is free) and e-mail to organize and to promote Federal candidates. The one restriction on use of the Internet is that any solicitation or acceptance of contributions via the Internet must fully comply with Federal law.
- 6. Country committees may freely communicate to their members.** There is no restriction on Country Committees communicating to their own members. The communication must be restricted to members and may include telephone calls, newsletters, mail, and e-mail. The communication may advertise a candidate, party or other political organization's event. This is an exception to the rule set forth in point 4 above.

**7. Distribution of literature at Country Committee meetings.** Country committees may freely distribute candidate-specific materials at Country Committee meetings.

**8. Non-partisan voter registration and absentee ballot campaigns.** Country committees are free to engage in non-partisan voter registration and absentee ballot campaigns. The committee must provide these services without regard to the party or candidate preference of the person who is being assisted. The committee can pay the costs of such activities without incurring any FEC reporting obligation. The committee may conduct these activities with other organizations but should pay for its own expenses related to the joint program. For example, the Country Committee may be reimbursed by another organization for a share of the costs.

**9. No contributions to Federal candidates.** Country committees may not contribute directly to Federal candidates, political party committee or any other political committee. The Country Committee may collect contributions for a Federal candidate provided that the contributions are *promptly* (within ten days) forwarded to the candidate with the requisite information including the name, address, occupation, and employer of the contributor. Some candidates prefer or require anyone accepting contributions on their behalf to receive authorization from their committee to do so. State and local campaigns are subject to state law and must be considered on a state-by-state basis.

**10. Registration with the Federal Election Commission.** Country committees are absolutely prohibited by the DNC from engaging in activities that would require registration and reporting to the FEC. To avoid having to report, a Country Committee should not 1) contribute to any Federal candidate, political party or any other political committee; 2) expend more than one thousand dollars in a calendar year expressly advocating the election or defeat of any Federal candidate; 3) spend more than one thousand dollars in a calendar year for public communications promoting, supporting, attacking or opposing a Federal candidate; or 4) engage in any combination of these activities that exceed one thousand dollars in a calendar year.

**11. No Transfers.** Country committees may not transfer funds to the DPCA.

**12. Penalties.** The penalty for a knowing and willful violation of federal campaign finance law is up to five years imprisonment for each violation.

## **1.5 Campaign Finance: A Basic Guide**

### **I. Introduction**

Section 1.4, “Playing by the Rules,” is an overview of the legal limits on the activities of country committees. This section expands on these mandatory and vital rules. The details can be confusing, due to the unusual status of Democrats Abroad within US law, but the DPCA’s policies will keep you in the clear. When in doubt, consult the International Counsel.

#### **A. *Where Democrats Abroad fits into the Democratic Party.***

The Democratic National Committee (“DNC”) treats the whole of Democrats Abroad the way it does a U.S. state party for certain purposes—for example, DA has the right to elect and send delegates to the Democratic National Convention just as the states do. For purposes of campaign finance law, however, DA is treated as part of the national Democratic Party (the “Party”) and is subject to the same federal laws as the Party.



As part of the Party, DA may only raise and spend what is called “hard money.”<sup>1</sup> This means that the country committees are subject to the restrictions on contributions outlined in Part II below.

The DPCA is registered with the Federal Election Commission (“FEC”), while a standing resolution prohibits DA country committees from being registered.<sup>2</sup> This means that the DPCA may do certain things that the country committees are prohibited from doing. The DPCA also must comply with certain reporting and disclosure requirements to which the Country Committees are not subject. The activities that the country committees are and are not permitted to undertake are outlined in Part III below.

### **B. *Why the rules are important.***

The Federal Election Commission (“FEC”) monitors compliance with the statutes and regulations governing campaign finance, and has authority to bring enforcement actions for violations. Penalties can include fines and, in cases of willful and knowing violations, criminal penalties, including imprisonment. In addition, violations can bring DA and the Party bad publicity – not to mention personal liability or criminal liability – thereby undermining our efforts to help Democrats get elected and advance the issues that are important to us.

Although DA does not operate in the United States, the FEC is interested in our activities (the DPCA submits monthly filings), and Republicans Abroad, the press or tourists could report any violations of the rules. While it is impossible to imagine every question that might be asked, this document summarizes the basic rules that DA country committees must follow with respect to federal law. If you have any questions concerning the information in this document or topics that are not addressed, please direct your questions to the appropriate DA officer.

## **II. Contributions**

A. **Limitations.** DA country committees may only accept so-called “hard money,” which means contributions are subject to the following limitations:

- **Source of contributions:** DA country committees may only accept contributions from individuals who are American citizens or bona fide permanent resident aliens (*i.e.*, bona fide green card holders), the DPCA, and the Party. They may not accept contributions from corporations, unions, non-US citizen, persons under the age of 18, or political committees or other organizations (other than the DPCA and the Party). An individual may not contribute money on behalf of another person.
- **Limits per individual:** An individual may only donate a total of \$30,800 per year in each of 2011 and 2012 to the Party; the Party includes the DNC and the DPCA. This amount is indexed for inflation and will change for year 2013 and all future years. There are other limits, such as limits on contributions to candidates, which do not directly affect Democrats Abroad; for informational purposes, these limits are provided in Appendix C1.

Country committees should use their best efforts to ensure that these conditions are met (although not mandatory, checking passports is strongly recommended for ensuring

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<sup>1</sup> Subject to state law, state and local parties can use “soft money” and so-called “Levin Funds” for certain activities, which Democrats Abroad, as part of the Party, is prohibited from doing.

<sup>2</sup> A few DA country committees were registered with the FEC, some time ago, but a DPCA standing resolution required them to cease conducting “registrable” activities. Now, no country committee registers with the FEC or conducts FEC-regulated activities.





nationality and age<sup>3</sup>), must reimburse any amounts that are found to have been received from prohibited sources, and may not accept more than \$100 in cash. Remember, the amounts discussed in this Handbook are in US dollars, so they must be converted for your local purposes.

**B. Required Information.** Country committees must collect the following information for each individual who contributes more than an aggregate of \$200 in a calendar year: (i) name, (ii) mailing address, (iii) occupation, and (iv) name of employer. It is best to collect this information from each contributor, as it may only become apparent at a later date that the \$200 threshold was crossed.

**C. Disclosure.** Printed solicitations should contain the following disclaimers concerning eligible donors and tax deductibility:

“Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation and name of individuals whose contributions exceed \$200 in a calendar year. Contributions to Democrats Abroad are not tax deductible for Federal income tax purposes as charitable contributions.”

**D. Bank Accounts.** Banking practices vary widely by region; while some European country committees provide bank account numbers on their donation slips to allow donations to be made by electronic transfer, such a practice would be highly unusual in other areas. DA country committees may follow local practices, but should obviously take care to prevent fraud (e.g., bank account numbers should not be posted on your website). Donations must be deposited into your bank account within 10 days of receipt.

**E. Commonly asked questions.**

➤ *Do goods and services count as contributions?*

Yes, goods and services are considered to be “in kind” contributions and count towards the \$30,800 annual contribution limit, with the exception of volunteer time. Loans and advances of money generally count as contributions at the time they are made and as long as they remain outstanding.

➤ *How are goods and services valued?*

Goods are valued at their normal purchase or rental price, and services are valued at the current market rate.

➤ *If an event has an entrance fee or suggested donation, but the proceeds are used only to cover event costs, does this count as a contribution?*

Yes, the total amount received counts as a contribution even if part or all of the money is used to cover costs. This rule also applies to goods that are produced and sold, such as t-shirts.

➤ *Does holding an event in my home constitute a contribution?*

No, an individual may hold events in his or her own room or rent a recreation room in a residential complex for a nominal fee without being considered to have made a contribution. Events may also be held in a church or community room if the room is regularly made available for noncommercial purposes without regard to political affiliation.

You may also purchase beverages, food, and invitations for such events provided that the total amount spent raising money for the Party does not exceed \$2000 in a

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<sup>3</sup> Obtaining a copy of a current and valid U.S. passport satisfies the duty to inquire whether funds come from a non-US citizen, which arises when there is reason to believe a person might be a non-US citizen due to circumstance such as a foreign address, and provides a “safe harbor” against prosecution for violation of the prohibition against accepting money from non-US citizen.



calendar year. Any amount in excess counts as a contribution. Note that a husband and wife may each spend \$2000, assuming they are American citizens or bona fide permanent resident aliens. (Just for informational purposes, the amount is \$1000 per year in relation to any single election of a candidate.)

- *May we “pass the hat” at meetings and events, asking for donations?*

Yes, you may pass around a plate for donations at meetings. However, you must ensure that non-US citizens and other prohibited persons do not make any donations and, as noted above, you may not accept more than \$100 in cash from any one person. Contributors should be reminded that they are required to give the information listed in Section B, above, if they give more than \$200 per year.
- *What should we do if we believe that a contribution comes from a non-US citizen?*

If a Democrats Abroad country committee receives a contribution that it believes may be from a non-US citizen, it must either (a) return the contribution to the donor without depositing it or (b) deposit the contribution and then either confirm its legality or issue a refund within 30 days. While the contribution is being confirmed, the funds may not be spent. A written record should be kept explaining why the contribution was or was not prohibited. If a country committee believes that a contribution is legal, but later learns that it was made by a non-US citizen, the amount must be refunded immediately; if sufficient funds are not available at that time to make the refund, it must be refunded as soon as additional funds are received. As noted above, the best way to confirm nationality is by requesting a person’s passport.
- *What activities are permissible for non-US citizens?*

Non-US citizens may not attend official meetings of the membership. Non-US citizens may attend other events, including attending country caucuses strictly as observers, but they may not pay to do so or contribute any money.<sup>4</sup> Non-US citizens are allowed to donate time to activities, such as stuffing envelopes, as long as this does not result in an item of value, such as a painting, being produced.
- *May an American citizen or a bona fide permanent resident alien make a contribution and then be reimbursed by a non-US citizen?*

No, it is illegal to act as a conduit or an intermediary for any other person, including a non-US citizen. If an American citizen pays an entrance fee for a non-US citizen, he or she may not be reimbursed by the non-US citizen.
- *May I donate money and hold events in my home if I am married to a non-US citizen?*

Yes, you may do these things, but all expenditures must come from your own funds.

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<sup>4</sup> Note, however, that although attendance by non-US citizens may be legally permissible from a campaign finance law perspective, country committees should consider appearance and political consequences in determining whether events will be open to non-US citizens.



- *May vendors donate products and services to my country committee or offer them at a discounted rate?*

A business may offer a discount on food and beverages without making a contribution, provided that the discounted price at least equals the cost of the product and the business gives such discounts to nonpolitical customers in the ordinary course of business. The value of the discount—*i.e.*, the difference between the normal price and the discounted price—must not exceed \$2000 per year for discounts to the Party. (Just for information, the amount to a candidate is \$1000 per election.) Any amounts in excess of this amount (and any discount below cost) would count as a contribution and would therefore be acceptable only from an American citizen or a bona fide permanent resident alien who owns an unincorporated business. If community centers are normally available for public use free of charge, you need not pay to use them.

- *What about the local offices of Coca-Cola, Facebook or Tiny American Corporation?*

Even an iconic “American” brand, like Coca-Cola, Microsoft or Levi’s, is not “American” whenever we are talking about their offshore subsidiaries. Local overseas offices may be staffed with Americans and the primary investors may be Americans, but the money is “foreign” in the way that matters to Democrats Abroad. The DPCA and Country Committees do not take money from corporations of any kind, so the distinction is not important anyway. Corporations cannot contribute anything (food, services, photocopies, and so on) and definitely not money. To put it as clearly as possible:

- Taking corporate money = Go to jail.
- Taking foreign money = Go to jail, hurt the Democratic Party, benefit Republicans, and a right-wing demagogue demonizes Democrats Abroad.

*THEREFORE, absolutely never even come close to taking foreign corporate money.*

Politically speaking, Democrats Abroad must never create a situation that helps the Republicans, their candidates, or their supports to peddle the notion that Democrats have any tolerance whatsoever for foreign cash. There is an immediate perception among Americans that cash from foreign sources is aimed at obtaining a quid-pro-quo, that is, an advantage that is ultimately to the benefit of foreign interests and an idea that we are somehow “selling out” to foreign interests.

### III. Expenditures

#### A. *Non-permissible activities.*

- **Advocating particular candidates.** The country committees of Democrats Abroad may not advocate the election or defeat of particular candidates. They may NOT print any statement or post or place any magazine, bulletin, radio, or television ad (not even in the title of an event) anywhere—even if it’s free—if that statement advocates or opposes ANY candidate or encourages people to vote for a particular candidate. If a country committee were to do so, it would be making a “public communication” which could require registration with the FEC.<sup>5</sup> As noted below, there is an exception for Internet communications.
- **Contributions to candidates.** The country committees of Democrats Abroad may not make contributions to candidates, the DPCA, the DNC, or any other political committee.

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<sup>5</sup> Technically, a committee could spend up to \$1000 on these types of activities and could distribute up to 500 pieces of literature or make up to 500 calls advocating the election or defeat of a candidate before it would have to register with the FEC. However, to be cautious, DA is taking the position that country committees should do neither of these things.

**B. Permissible activities.**

- **Party and membership building activities:** Country committees may print, write, post, or otherwise publicly advertise to recruit new members. They may contribute to the Party by holding caucuses and making proposals concerning the Party platform.
- **Voter registration:** Country committees may conduct non-partisan voter registration, which means they must register anyone who requests to register and not attempt to know or influence which party they register with. This may be done in conjunction with Democrats Abroad events, and committees may advertise that Democrats Abroad is sponsoring voter registration events. However, country committees cannot say, “Vote Democrat,” and should separate literature on Democrats Abroad from the information on voter registration. Voter registration may also be done in conjunction with other groups, though the country committee must pay for its share of all costs.
- **Communications with members:** Country committees may say what they like to their members.
- **Internet communications:** Currently, country committees may also say what they like if communicating via the Internet or by email as a legal matter. However, country committees should consider the political consequences of any statement they make. The FEC currently is revising the rules relating to electronic communication by court order; it is likely that the country committees of Democrats Abroad will be able to continue freely using the Internet and sending emails as long as they do not pay someone else to run advertisements or purchase email lists. Country committees may not send more than 500 identical, unsolicited emails (emails to members would not be considered unsolicited).
- **Fundraising at the local level:** Country committees may raise as much money as they want (and as they can), as long as all the rules described in this guide are followed. They may not say, for instance, “Give us money to beat Romney,” but they may say “Give Democrats Abroad money to help us grow.” References to progressive politics, platform issues, etc. are allowed.
- **Fundraising for DPCA:** The country committees of Democrats Abroad may also do fundraising for the DPCA, which is extremely important because the DPCA (which is registered with the FEC, unlike most country committees) is allowed to promote the election and defeat of particular candidates. The funds are used for things like newspaper ads, databases to keep track of members and their voting states, and other things decided by the DPCA. The DPCA also uses funds to provide services to the country committees of Democrats Abroad. The DPCA is not allowed to take any money from an unregistered country committee, so members must donate directly to DPCA.<sup>6</sup> Democrats Abroad country committees may, however, collect the donations and forward them to the DPCA.

**C. Commonly asked questions.**

- *How do these rules affect me if I give an interview or participate in debates or pro-candidate events?*

Officers and members of the country committees of Democrats Abroad may speak to the media in interviews and participate in debates. However, if you are identified as a member of Democrats Abroad—which is very likely in this context—then the Party’s positions are the positions of Democrats Abroad, and personal opinions must be very clearly expressed as such. Individuals may participate in pro-candidate events, but Democrats Abroad country committees may not advertise these events, except within their own memberships.

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<sup>6</sup> Contributions can be made over the Internet at <http://www.democratsabroad.org/contribute.php>.

➤ *Do the rules governing country committees affect what I may do as an individual?*

As an individual, you may say what you want, including wearing t-shirts or buttons, as long as you pay for these things yourself. You may stand at a speak-up or hand out information at a demonstration or near a voter registration table, provided that it is clear that you are doing these things as a private person and the information is not paid for by Democrats Abroad and does not mention Democrats Abroad. As noted above, personal opinions should be very clearly labeled as such. You should also bear in mind that if you are doing any of the above activities and are wearing prominently displayed Democrats Abroad logos, members of the press may get the wrong impression.

You, as an individual, may also hold events to raise money for candidates or the Party, and, of course, you may donate money to any candidate or political organization you want.

➤ *Are joint events with other organizations permissible?*

You may hold joint events with other groups, but country committees may not accept money from non-US citizens, donate to another group, or pay for materials that promote particular candidates. For example, in 2004, Democrats Abroad held joint events with a group called Americans Overseas for Kerry (“AOK”). There had to be at least one representative from each group at each event (though particular people could have been members of both groups), and, although materials promoting Kerry were permitted at the events, the country committees could not pay for any of these materials.

Joint events should not be fundraisers, as rules concerning joint fundraising are complex. It is acceptable, though, to collect donations from American citizens at such events. Country committees must pay their share of any costs related to such events.

## **1.6 The DPCA website – [www.democratsabroad.org](http://www.democratsabroad.org)**

The Democrats Abroad international website is a communications and outreach tool of Democrats Abroad, meant to reach Americans, and especially Democrats, living outside the USA.

The international website aims to expand membership and encourage participation in the organization. It is the primary communications channel to educate, inform and assist Americans in the civic process. Through continuous improvement of the site, its content provides support for the creation and maintenance of a community – and communities, as in the cases of home-state groups and Country Committee groups.

With up-to-date information on voting issues, candidates, requirements, and tools for registering to vote, political action, and important contacts, the site is instrumental for accomplishing the overall mission of Democrats Abroad: to represent the interests of US citizens living abroad and to elect Democrats to Congress, the White House, and where permitted, state offices.

An Executive Committee Standing Resolution prohibits full and in-formation Country Committee from developing its own web pages, accessible through its own URL. The international site, [democratsabroad.org](http://democratsabroad.org), has a section for all start-up groups, including a list of all such groups. There is a worldwide calendar of events that draws from all countries’ activities, and a home page that includes information about all in-formation Country Committees.

Full and in-information committees are responsible for the maintenance and update of their own web pages. For simplicity, our webmaster can create the pages for you, using the template set up on the international site, which has been designed to be easy to use and update. Quick Guides are available at [www.democratsabroad.org/help/pages](http://www.democratsabroad.org/help/pages). The Executive Director ([ed@democratsabroad.org](mailto:ed@democratsabroad.org)) can provide your full Country Committee with a password, once our webmaster has created the pages for you. The international webmaster will update information for in-information committees on their behalf.

Section 2.2: Resources from the DPCA includes information about social media and the DPCA's email listserv, which is an important resource for Country Committee leaders. Please see Appendix E4: DPCA Conference Calling Resources and Appendix E5: The DPCA-Leadership Yahoo Group. Also, check the Online Handbook for the most recent guidance.



## 1.7 The Membership Database

We must exercise great care in handling the names, addresses, and other information associated with both our members and any others who may seek information through our organization. It is our longstanding policy that our membership list is not for distribution or sale, and cannot be shared with individuals (even other members of Democrats Abroad), outside organizations, political candidates, or the DNC.

**All members of Democrats Abroad must be entered in the DPCA online database.** It is our primary resource for reaching members, whether on a worldwide basis or by country, chapter, or US voting state. The database has facilities for sending e-mail messages to members and, of course, for printing out mailing labels.

To qualify as a member of a local Country Committee, the minimum requirement is a local physical address and a local telephone number. This information is critical for facilitating outreach at the local level and must appear in the DPCA online database. The US voting address section is also important, particularly the US state. Those members who have never lived in the US and/or don't know their full voting address should be noted, because this could affect their ability to vote from overseas.

It is the responsibility of each Country Committee to maintain accurate and updated records of its membership, and to comply with the current data protection policy. To ensure the confidentiality of database information, all persons having access are required to sign a confidentiality undertaking. One option is that the Secretary of a Country Committee or Chapter has responsibility for the relevant database tasks. Another option is for the Country's Executive Committee to designate a Database Administrator. Access to the database may be requested from the DPCA Executive Director ([ed@democratsabroad.org](mailto:ed@democratsabroad.org)).

### Data Protection Policy

All persons having access to membership data must be very cautious and observe the policy indicated below. Questions in the first instance may be directed to the International Counsel, International Chair, International Vice-chair, Regional Vice-chairs, or Executive Director. The safest way to ensure compliance is to never transfer data to non-officers.

**Access:** With respect to data access, Democrats Abroad's firm, longstanding policy is that no one other than officers of DPCA, the Executive Director, and officers of the country committees of Democrats Abroad may have access to membership data in any form. We do not permit data transfer to anyone, not to the Democratic National Committee, not to Democratic candidates, not to anyone!



Sometimes a Country Committee has been asked to send out a mailing for another entity. That may create other issues, such as FEC compliance, but those aside, cooperation is only permissible if Democrats Abroad maintains full control of the data. That is to say, do not give mailing lists or even mailing labels to outside entities, ever! Any such mailing must be done entirely by Democrats Abroad (i.e. the DPCA or a country committee of Democrats Abroad) without giving any third party access to the names or data of recipients. If mailings are handled by a mailing house, it is permissible to give access to address data but only when there is a signed confidentiality and non-use agreement in hand that has been approved by the International Counsel and International Chair.

**Usage:** As a corollary, no one with access to the data may make any use of it for any reason other than our own organic official business. One may not make personal or commercial use of or reveal data to third parties for any cause. Less obviously but still true, one may not download data for the purposes of making political pitches or running for office, *even an office within Democrats Abroad*. Mechanisms other than privately accessing official rolls exist to help Democrats Abroad candidates—in a global primary or other elections—to get out their message, such as through nominating committees that disseminate candidate messages equally to all.

**Identity:** Importantly as well, we do not allow Country Committees to confirm or deny to outsiders (e.g., the press) whether a certain person is or is not a member, as even that information is protected. This confidentiality protection is very important to all of us. Together, let us ensure our members' privacy and safety and that only legitimate usage occurs.

**Technical Footnote with practical consequences:** Membership in Democrats Abroad is essentially international, not local in nature. Since the database is maintained on servers in the U.S., Country Committees everywhere should encourage new members to join directly through our web-based membership page. Ideally, this information is immediately accessible for the respective Country Committee of residence.

As long as members sign up locally, all membership forms must include the same disclaimer and waiver as exist on our website. We need to ensure that our members have opted in to the transfer of their data to the US, given the 70-odd countries in which we operate and the ensuing plethora of laws on, for example: data deletion, holding sensitive information on political stances, ethnicity, individual access rights, transfer privacy guarantees, and even the use of cookies and secure Internet transfer methods. Hard copies of membership forms (or digitized images) must be maintained for inspection.

### **Database Verifying**

**Each year, each Country Committee's database must be certified as accurate** with the Executive Committee of the Country Committee. The Executive Committee then certifies a formal report to the DPCA. The deadline for certification of 2011 membership was January 31, 2012.

During years with mid-term elections and presidential elections, Chapters and/or Country Committees should send emails to all members about elections, and also ask the members to inform the Chapter or Country Secretary of any changes to their membership details.

After the email request, the Democrats Abroad leaders should ask volunteers to call everyone on the membership list -- for example, over a few weekends. This will allow you to update your lists, based on the responses. Volunteers should note non-responses for follow-



up. Before getting started, consider how you will collect data, and how you will remain compliant with the data confidentiality rules above.

Each year, around November, you should perform another round of verification. For those whom you could not contact, send out individual, personalized emails asking the missing members to contact your country's Secretary or Database Manager directly if they are still living in your country. If a member is not still in your country, determine whether they are in the USA or another country.

For those members still not accounted for, follow up with phone calls and verify their contact information. You may want to do one more follow-up, with what should be a few remaining members, either by postal mail or personal visit if someone lives nearby.

### **Chapters and Opt-Outs**

The DPCA aims to simplify and to make self-selecting the chapter assignment process for those Country Committees with chapters. The procedure for members who opt-out of email contact is under review as of January 2012, and linked to the assignment of members to countries and chapters. In any case, all members of Democrats Abroad should expect to receive a handful of urgent election-deadline related emails during an election year, unless they specify snail mail or leave the organization.

### **Country Administrator Training**

The volunteer IT team provides training sessions at many physical meetings at the regional and international levels. The team would be happy to provide individual training as necessary.

In addition, a comprehensive set of IT manuals is available through the "Country Admins" group on [democratsabroad.org](http://democratsabroad.org). This group is an active source of information, with many questions and answers attached to its posts.



### **Problem Reporting**

Any problems should be reported to the Global IT team ([da-it-team@democratsabroad.org](mailto:da-it-team@democratsabroad.org)). The Global IT team will log these problems and report them, in summary, to the DPCA Executive Committee. This is intended to provide management information, to ensure that we support our IT team and resources well. If you have follow-up questions about your IT problem, you may contact the Global IT team directly.

## **1.8 The Handling of Funds**

### **A. The Country Committee Treasurer's Responsibilities**

With the stringent regulations and heavy penalties placed on political parties under campaign finance reform, all committees (full, in-information, and start-up) must follow strict guidelines. Under a standing resolution of the DPCA Executive Committee, Country Committees should not be conducting any activities that would require them to register with the Federal Election Commission (FEC). Our policy is that activities requiring registration with the FEC be carried out only by the Democratic Party Committee Abroad (DPCA). (See Section 1.4: Playing by the Rules.) The DPCA is responsible for the timely and correct filing of our FEC reports. Country Committees may act in coordination with and as agents for the DPCA. (A few Country Committees were once FEC-registered. Over time, those committees ceased their FEC-registered activities.)





As it is the DPCA Treasurer who is responsible in the eyes of the FEC, the first point of contact for any questions or problems should be the DPCA Treasurer. The Country Committee Treasurer should cc the Executive Director and International Counsel on all correspondence pertaining to funds and their use.

Specific responsibilities of the Country Committee Treasurer include, but are not limited to:

- Maintaining clear, complete and accurate financial records for the Country Committee
- Depositing cash and other donations in the Country Committee bank account in a timely manner (or following alternate procedures without delay)
- Directing donors to the DPCA to the appropriate method for making donations
- Obtaining compliance forms from donors when appropriate (See Appendix A2.) Making approved expenditures and maintaining related invoices
- Keeping records, including copies of any contribution checks, for a seven-year period
- Signing all reports and statements
- Filing any required financial reports on time
- Maintaining local accounts and records in accordance with local laws
- Complying with local laws that provide for other responsibilities

Campaign finance law prohibits the DPCA and all Country Committees from accepting donations in cash in amounts over \$100 (per year, per donor) or from accepting any funds from non-U.S. citizens other than bona fide “green-card” holders. Donations over \$100 must be made by check, or preferably, by credit card.

## **B. Funds to the DPCA: Fundraising and other events**

Individual donors are a significant source of revenue for the DPCA. Treasurers and Committee Chairs should ensure that the Country Committee members are aware of the importance of ongoing fundraising campaigns for the international level of Democrats Abroad, that is, the DPCA.

For local events on behalf of the DPCA, request that attendees pay using the online payment method. This is not only a way to make sure all your reserved attendees have paid, but makes the compliance paperwork substantially easier. This online payment page is separate from the regular contribution page, since it includes event and country for tracking purposes. As the event payments come in, the DPCA will provide contribution reports. Please contact the Executive Director at [ed@democratsabroad.org](mailto:ed@democratsabroad.org) so that you can coordinate. You can easily use this list at the registration tables.

Please allow one week if possible for the set-up of any country-specific event online. Make the request by contacting the Executive Director and copying your Regional Vice Chair and the International Treasurer on the request.

Anyone who cannot pay using the DPCA’s secure online system must complete a compliance form and pay in the following ways. (See Appendix A2 and Section 1.5: Campaign Finance, A Basic Guide.)

- Credit Card (Visa and MasterCard only)
- Check (US Dollars) made out to **Democrats Abroad**.

The DPCA cannot accept wire transfers or checks from Country Committees.



Because contributions must be deposited within 10 days of their making, credit card forms, checks, and compliance forms must then promptly be:

Mailed to: Executive Director, Democrats Abroad  
PO Box 15130, Washington, DC 20003-0130 USA

Or couriered to: Executive Director, Democrats Abroad  
430 South Capitol Street SE  
Washington, DC 20003  
USA

***Please remember! Cash contributions are limited to \$100 per year per donor! And, it is illegal to accept any funds from corporate bodies or non-U.S. citizens other than bona fide “green card” holders.***

All contributions should go directly to the DPCA. For certain shared fundraising events, the DPCA will then reimburse the local Country Committee—by check or wire transfer; checks preferred—for a portion of the net proceeds received.

The DPCA can also make some pre-payments related to the event, with proper documentation.

If necessary, the DPCA can advance a Country Committee funds to cover expenses provided the committee sends a detailed estimate and promptly follows up with receipts. The DPCA is unable to pay to advertise a local event.

For other online contributions, donors can access the DPCA’s secure online system by clicking “Contribute” on the front page of [www.democratsabroad.org](http://www.democratsabroad.org).





## 1.9 Voter Registration

For the most up-to-date information on Voter Registration, Get Out the Vote (GOTV) and the Global Primary of Democrats Abroad, please see the Online Handbook. This information changes frequently, and the DPCA Communications Committee's Voter-Reg-in-a-Box is a good place to start.



In 2009, Congress passed the MOVE Act, which means that **Americans living overseas must register to vote and request a ballot every year, for both primaries and general elections**. You must do this even if you have been receiving ballots without re-registering until now. If you do not, your vote could be challenged and considered invalid.

So what does this mean?

We need to do everything possible to make sure American citizens register to vote. Here are some tips about how to do so. Please note that the Democrats Abroad Voter Registration Task Force will be running telephone conference call workshops starting in early 2012.

### What is the basic process?

- Voters have to do two things, which happen simultaneously. When they register to vote in their state of record, they are simultaneously requesting a federal ballot.
- There is no completely online system that is not part of a state website (11 states have complete online registration systems, and 6 states have complete online absentee ballot request systems). There are, however, several websites that help you fill out the initial form, which you must then print and mail.
- There are also pre-printed voter registration/ballot request forms (the Federal Post Card Application – FPCA) which you can request from your local US embassy, fill out, and then return by mail to your local election official.
- The Citizen Services section of your local US Consulate is responsible for overseas voter awareness and will be a good resource for forms. In some cases they will also mail voter registration forms that have been completed at your voter registration drives.
- Once voters complete and send in a registration form, they should receive confirmation of their eligibility to vote from their local election officials.
- Voters then should receive a blank absentee ballot, which they will have to fill out and return before the ballot receipt deadline.
- Many states are now sending ballots by email as well as post. However, most of the email ballots must be returned by post. Country Committees of Democrats Abroad should facilitate this process.
- Many states have a way for voters to check on the status of their registration/ballot request. A complete list with each state is available online, linked to the Online Handbook. Also, to facilitate the process, Democrats Abroad recommends that voters reach out individually, by phone or email, to their local election officials (e.g. county clerk, town clerk, depending on the state).



- Should the voter's ballot not arrive on time, the voter can download a Federal Write-In Absentee Ballot from the Democrats Abroad website. Check the Online Handbook for the particular link.

**To help American citizens to vote, each Democrats Abroad Country Committee therefore should:**

- Check the Event-in-a-Box resource for Voter Registration / VFA / GOTV (Get Out the Vote) for supporting materials from the DPCA.
- Set a goal for how many Americans you will register to vote.
- Create a plan for how and when you will hold voter registration events, and how you will advertise them.
- Form and train a team of voter registration volunteers.
- Identify your Republicans Abroad counterpart for nonpartisan voter registration events.
- Form a relationship with the Public Affairs Officer in your local US embassy; this person can help you advertise your nonpartisan voter registration events, provide you with FPCAs and guidebooks, and collect/mail completed FPCAs.
- If you are an Embassy Warden (volunteer), you may be able to arrange for the Embassy to register voters when they pay a visit to your outlying region.
- Create printed material on how to register to vote.



**When should we work to register voters?**

- Since primaries come early, start your voter registration events as of January 1!
- Voter registration in most states closes by early October, which means holding most registration events no later than mid September for the forms to reach the county clerks before the deadline, but you should continue to help register voters as long as possible for late registration states.

**How can we register voters?**

- You can register voters informally by providing information and encouragement on how they can do it themselves. You can register voters formally by holding specific voter registration events.
- Print and carry around with you business cards or flyers with information about voter registration. Templates are available through the Online Handbook, and the Event-in-a-Box for Voter Registration (as mentioned above).
- Surf off others' energies by setting up voter registration tables at appropriate events such as American school activities, or other gatherings of American citizens.



- Hold specific voter registration events, such as:
  - Block parties in neighborhoods with many Americans
  - US-related events such as parties for the Super Bowl, Thanksgiving, and the Fourth of July – and have voter registration materials on hand
  - Regular voter registration tables, set up in places where Americans congregate, such as malls or grocery stores
  - A sequence of specific voter registration events, ideally in a variety of locations and at different times/days of the week

### **How and where can we advertise voter registration events?**

- Often the best way to reach Americans is through the Embassy Warden System, which sends email alerts about security matters to all those US citizens who have registered with the Embassy. However, for an embassy to advertise your event, it should be non-partisan. A good approach is to work with your local Republicans Abroad representative to advertise and hold voter registration events sponsored by both Republicans Abroad and Democrats Abroad. Once you've secured that partnership, contact the Public Affairs Officer at your local US embassy. (The Online Handbook includes a sample warden message.)
- Other ways to advertise registration events are through English-language newspapers and magazines, at American or international schools, in English-language bookstores, at cafes and restaurants frequented by Americans, etc.



### **What should we bring to a voter registration event?**

The best approach is to bring a computer and to use the [www.votefromabroad.org](http://www.votefromabroad.org) website as it maintains up-to-date information about the frequently changing electoral rules in all 50 states and US territories – and it has an option to have the voter become a member of Democrats Abroad. As an alternative, you can request voter registration forms from the US embassy, bring them to the event, and help people fill them out. The embassy may even agree to collect your filled-out forms and mail them to the US.

Also consider bringing:

- Laptops for checking state deadlines, addresses for mailing completed forms
- Printers to print completed registration forms
- Network connection
- Stamps and envelopes
- FPCA forms if you cannot get a good network connection at the place of your registration
- Printed information about how to register to vote so that those who have done so with you can share with family and friends
- Printed flyers and materials from the Voter-Reg-in-a-Box, available online.

### **How should we prepare for a voter registration event?**

- Recruit a number of volunteers and train them in advance on how to help people register to vote, both electronically and using the pre-printed forms. Consult the checklist of key topics for training volunteers, available in the Online Handbook.



### How should one follow up a voter registration activity?

- Keep track of how many voters you have registered.
- Have information handy about how to get involved with the local Democrats Abroad chapter, including information about your upcoming event.

### What are good resources for learning more about voter registration?

- The Voting Action Center on the Democrats Abroad website: [www.democratsabroad.org](http://www.democratsabroad.org)
- Vote from Abroad, the Democrats Abroad voter registration center: [www.votefromabroad.org](http://www.votefromabroad.org)
- The Event-in-a-Box for Voter Registration / VFA / GOTV, at [democratsabroad.org](http://democratsabroad.org)
- The Federal Voting Assistance Program, “voting help for Uniformed Service members, their families, and Citizens living outside the US”: [www.fvap.gov](http://www.fvap.gov)
- [http://travel.state.gov/travel/living/overseas\\_voting/overseas\\_voting\\_4754.html](http://travel.state.gov/travel/living/overseas_voting/overseas_voting_4754.html)



### What are the most frequent issues that come up with voter registration?

*What do voters use as their "legal state of residence" for voting purposes?*

- Voters use the address where they last resided immediately prior to departure from the US. This residence remains valid even though the citizen may no longer own property or have other ties to their last state residence and their intent to return to that state may be uncertain.

*How do you register US citizens who have never resided in the US?*

- In some states, a person can vote in the state where his/her parent last voted, although some states do not allow this, in which case some volunteers have found that states **without** laws expressly prohibiting these types of citizens from voting will allow them to vote. Explain the possibilities of denial by the local election official to the registrant and complete a registration anyway.

*Will people be taxed if they vote?*

- No, not as a result of voting in federal elections, if this is the only point of connection you have to the state. Per the Democrats Abroad website: “Voting in an election for Federal offices only may not be used as the sole basis to determine residency for the purposes of imposing state and local taxes. If you claim a particular state as your voting residence and have other ties with that state in addition to voting, then you may be liable for state and local taxation, depending upon that particular state law. Consult your legal counsel for specific questions or situations.”

*What if a person does not remember his or her voter registration address?*

- One option is to suggest that the person calls a friend or family member, on the spot. Also, some states allow you to **describe** where you last lived (like the corner of 16<sup>th</sup> and 33<sup>rd</sup> Streets, third house from the corner).



*What offices will people be able to vote for, once they register?*

- The process described above enables people to vote in federal elections (President, Senators, Representative). In some states that have a state income tax, you may be required to pay income tax in that state to vote in state elections – but if your state does not have a state income tax, you are generally eligible to vote the entire ticket.

*What happens if voters do not receive their ballot?*

- From [www.fvap.org](http://www.fvap.org): “States and territories are required to mail ballots at least 45 days before an election. If you have not received your ballot 30 days before the election, contact your local election official (contact information available on most State election sites, through links at the Online Handbook). If you encounter problems contacting your local election official, contact the Executive Director of Democrats Abroad. Always complete and return your absentee ballot regardless of when you receive it, even if you have already submitted a back-up Federal Write-In Absentee Ballot (linked at the Online Handbook). Your local election official will ensure that only one of the ballots is counted.”

*How do voters mail their completed ballots?*

From the [www.travel.state.gov/travel/living/overseas\\_voting](http://www.travel.state.gov/travel/living/overseas_voting) webpage: Complete your ballot carefully and legibly, and return it to your local election officials before your state's ballot receipt deadline. Overseas voters have a number of options for returning voted ballots:

- **Local mail** - If you live in an area with efficient mail service to the United States, you can affix sufficient international postage to your ballot envelope and mail it promptly. Official election ballot envelopes that bear postage-paid markings can be returned via U.S. diplomatic pouch or Military Postal Service, free of charge. You also may submit your ballot in person to your closest U.S. embassy or consulate. Please contact the consular section for specific instructions and hours of availability in your country.
- **Fax, E-mail, or Internet** - A number of states now allow the return of voted ballots via electronic means. Consult the Federal Voting Assistance Program's Voting Assistance Guide for electronic transmission options for your state.
- **Express Courier Service** - If time is short or local mail is unreliable, you can use professional courier services such as FedEx, DHL, or UPS and check Democrats Abroad online resources for information about reduced rates for voters. If you use a service that does not permit mailings to PO Boxes, the VoteFromAbroad website provides physical addresses for election offices that use PO boxes for mailing addresses.

## 1.10 Meetings and Conventions

### A. Democratic Party Committee Abroad (DPCA) Meetings

An annual DPCA meeting must be held to conduct business, and in odd-numbered years, elect officers. Additional general meetings of the DPCA may be held as needed. All meetings will be announced, typically through an email message to DPCA members and posting on the Democrats Abroad website.

The rules requiring attendance (whether electronic or in-person) at DPCA meetings are in Section 2.4 of the DPCA Charter. They come down to this: a Country Committee must send a voting member (Chair, Vice-Chair, or Voting Representative) to at least one of every three



meetings. Attending a meeting by electronic means (e.g. WebEx, Calliflower or telephone) does count as attendance for this purpose.

The members of the DPCA are:

- Members of the DNC representing Democrats Abroad (typically elected during Convention years)
- The DPCA officers: International Chair, International Vice Chair, International Treasurer, International Secretary, International Counsel, and the three Regional Vice Chairs.
- From each Country Committee: the Country Committee Chair, Vice-Chair and Voting Representatives (if any)

Notice of the meeting and a tentative agenda must be sent out 45 days or more before the date of the meeting to DPCA members. Up to 30 days before the meeting, DPCA members may request that the International Chair add items to the agenda. Up to 30 days before the meeting, members can also propose resolutions for adoption by the DPCA. A final agenda and the proposed resolutions are sent to DPCA members 15 days before the meeting.

Members of the DPCA can participate in this meeting in person or by electronic means. Those who are unable to participate in person, either physically or telephonically, can submit a written proxy, under some rules and restrictions. (See Charter, Section 3.7.) In all cases, participation by telephone or other means such as Skype will be available. Members of Democrats Abroad, who are not voting members of the DPCA, are welcome to attend, space permitting.

The DPCA does not and cannot charge a fee for participating; members who wish to attend the meeting but opt out of meals and beverages are entitled to attend the meeting free of charge.

The venue for the next meeting is adopted at the preceding DPCA meeting. (Bid forms are available in the Online Handbook.) Preparing for a DPCA meeting is no easy task but it is also a wonderful opportunity to welcome DPCA members from around the world to your city. All members of the DPCA pay their own expenses related to travel, hotel, and meals; the host committee always tries to identify several options to minimize costs per person.



## **B. Delegates to the Convention and the Delegate Selection Process**

Every four years, Democrats Abroad sends a delegation of dozens of people from around the world to the Democratic National Convention. The delegation varies according to the rules of the Convention, but always includes several delegates, alternates, and a page. Of these, one member (for each committee) serves on the convention Platform Committee, the Credentials Committee, and the Rules Committee. Democratic National Committee (DNC) members representing Democrats Abroad are included in the delegation.

The delegation is selected according to a Delegate Selection Plan and Affirmation Action Plan adopted by the DPCA through a process that begins more than 18 months before the Convention. The process includes a public comment period and the plan's approval by the DNC. Almost a year and a half before the Convention, the Affirmative Action Committee members are appointed.

Democrats Abroad began using a Global Primary system in 2004 and plans to continue doing so. The actual mechanics of the primary can be complex, so please ask a member of the DPCA Executive Committee for more information about an upcoming primary and convention. You can find current and past Delegate Selection Plans on [democratsabroad.org](http://democratsabroad.org).





## **C. The Platforms of Democrats Abroad and the Democratic Party**

### **Democrats Abroad Platform**

Traditionally, Democrats Abroad adopts a platform every four years as part of the process leading up to the National Convention. Democrats Abroad is rare amongst the State Parties in doing so. The platform serves not only as a basis for political action by Democrats Abroad over the following four years but is sent to the Democratic National Convention for consideration as part of the national platform.

Provisions for the Democrats Abroad Platform are drafted at the local and country-level caucuses. Each provision passed by a caucus is then forwarded to the Platform Committee for consideration in the worldwide platform. The Platform is then discussed and voted on at the DPCA meeting and global convention. Current and past platforms are available in the Online Handbook.



### **Democratic Party Platform**

Every four years, the Democratic Party lays out the challenges of our time and the Party's vision for meeting those challenges in the official Democratic Platform.

This Democratic Platform is created during the Party's Convention, with the participation of delegates from Democrats Abroad. The Platform shapes the policy stances and priorities of all parts of the Party, including Democrats Abroad. For example, before annual meetings of the DPCA, the DPCA's Resolutions Committee determines whether proposed resolutions are compatible with the active Democratic Party Platform.

## **D. DC Doorknocks, Issues, and Talking Points**

Democrats Abroad is increasingly active in issues-based lobbying in Washington DC, especially through carefully prepared, in-person conferences during odd-numbered years (i.e. "doorknocks"). The latest issues, talking points, and reports from prior visits are available on [democratsabroad.org](http://democratsabroad.org).



If you plan to visit Washington DC and you would like to further this effort, please contact Democrats Abroad's Executive Director several weeks in advance.





## Part Two: Useful Information

### 2.1 A Brief History

American Democrats living and working abroad have contributed to the political life of the United States since its very beginning. The first famous Democrat, Thomas Jefferson, drafted the Bill of Rights while in Paris, France. Since then, many other Democrats resident in foreign countries have participated in U.S. politics. In the 1960s, Democrats living overseas began to organize themselves into a group, and Democrats Abroad was born.

#### Creation of Democrats Abroad

In the 1960 Presidential campaign between John F. Kennedy and Richard Nixon, Democrats in Paris and London started talking about ways they could help the Democratic Party. Four years later, they were ready.

Democrats Abroad first organized simultaneously in Paris and London in 1964, when Lyndon Johnson defeated Barry Goldwater. Democrats in each of those cities formed committees and elected officers. Under the leadership of Toby Hyde (London) and Al Davidson (Paris), Democrats held parades and raised funds. The nascent committees also solicited votes, but few were cast from abroad because in 1964 U.S. citizens living overseas did not have a federal right to an absentee ballot.

The activities of Democrats Abroad in 1964 were the first U.S.-style political campaigns ever mounted in foreign countries; they aroused considerable local interest and generated wide publicity in France and England.

Democrats Abroad also attracted interest in the United States. John Bailey, the Chairman of the Democratic Party, on behalf of the Democratic National Committee, recognized the Paris and London committees, and the White House appointed James Rowe, a well-known political figure in Washington, as the liaison with President Johnson.

After the 1964 victory, Democrats Abroad continued to grow. In 1968, they campaigned for the Humphrey-Muskie ticket against Nixon and Agnew. Between the two elections, the leaders of Democrats Abroad started another campaign, one that would last twenty years and have a significant impact on all U.S. citizens living overseas: the campaign for full voting rights for U.S. citizens overseas.

#### The Overseas Citizens Voting Rights Act of 1975 & The Uniformed and Overseas Citizens Absentee Voting Act of 1986 (UOCAVA)

In the 1960s, Democrats Abroad were able to raise funds and generate publicity. Getting out the vote was another matter, since U.S. citizens overseas did not have the right to an absentee ballot. The issue was complicated by the state-based nature of voting regulations, even for voting in federal elections. Providing a federal right to vote required modifying all state voting systems.

The first demands for the right to vote by absentee ballot had been made more than 100 years earlier, in the 1860s, when Union soldiers fighting in the Civil War who wanted to vote had to return to their States for the election. In World War II, the issue of absentee ballots was raised again.

A century later, U.S. voters in the United States could vote by absentee ballot if they were unable to get to the polls on election day. It was not so easy for U.S. voters living overseas. To remedy the injustice, leaders of Democrats Abroad formed the Committee for Absentee





Voting, a bi-partisan group with the Republicans, and began a ten-year struggle to expand the franchise to overseas U.S. citizens.

Hubert Humphrey and Bob Strauss were early supporters. In the Congress, Senator Claiborne Pell and Representative Thompson were formidable leaders in the campaign to end the disenfranchisement of U.S. citizens living and working all over the world.

During the final days of the 94th Congress, House Majority Leader Tip O'Neill engineered the passage of "The Overseas Citizens Voting Rights Act of 1975" through a crowded calendar. President Ford signed the Act into law in January 1976. Many Americans, however, refrained from voting while overseas because they feared tax consequences. In 1977-78, Dean Ferrier and Peter Alegi led the efforts to resolve this problem. In November 1978 Congress modified the Overseas Citizens Voting Rights Act to make clear that exercising a vote in a federal election would not by itself cause any state, local or federal tax consequences. With this solid base, Democrats Abroad then helped convince Congress to pass the Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA) of 1986, which laid the legal basis for a vast expansion of access to voting by Americans residing abroad. Each year more local barriers are removed as the federal legislation is enforced at the state and local level. This breakthrough legislation has swept away almost all important legal obstacles to absentee voting by Americans abroad.

In 2001, following major election irregularities in Florida, Democrats Abroad began a campaign to amend the Uniformed and Overseas Citizens Absentee Voting Act to remove further obstacles to overseas voting. Chair Small Hoover and Executive Director Fina hired a Republican lobbyist to help gain access to members of the then-Republican majority. Many, but not all, of our proposals were embodied in the Help America Vote Act of 2002. These included permanent registration for two full federal election cycles (rather than one previously) and the collection of statistics on overseas absentee voting never before available.

Democrats Abroad also began to play a major role in the inclusion of overseas Americans in the decennial census. Chair Small Hoover and Executive Director Fina, with the support of Congresswoman Carolyn Maloney, won the agreement of the Bureau of the Census to begin a series of trial counts after the completion of the 2000 Census to determine whether the inclusion of overseas Americans would be feasible for the 2010 Decennial Census. This trial period was begun in 2004.

## Milestones

The Democratic Party was far ahead of its Republican rivals in understanding and recognizing the potential political power of political rights of U.S. citizens overseas. Chairpersons of the Democratic Party since 1964 have granted increasing recognition to Democrats Abroad. John Bailey, Larry O'Brien, Bob Strauss, Chuck Manatt, Don Fowler, Ron Brown, David Wilhelm, Steven Grossman, Joe Andrew, Howard Dean, Tim Kaine and Debbie Wasserman-Schulz have all shown support for Democrats Abroad.

As a result of the view taken by the Democratic Party and its successive chairpersons, Democrats Abroad has made steady progress achieving official status within the organizational framework of the Democratic Party. Each year brought new advances:

1972: Chairman O'Brien grants nine non-voting delegates to Democrats Abroad for the National Convention in Miami. Nine Democrats Abroad from four countries attend.

1973: Chairman Strauss gives Democrats Abroad representation on the Democratic Charter Commission, a group of 160 leading Democrats from all States in the Union.

1976: Eight Country Committees form the Democratic Party Committee Abroad (the DPCA) and the DPCA's by-laws are filed with the DNC in Washington, D.C.

- 1976: The Party Call to the 1976 National Convention gives Democrats Abroad voting delegates, enabling us to participate directly for the first time in the selection of the Party's presidential nominee.
- 1976: Committees in Belgium, France, Germany, The Netherlands, Israel, Italy, Mexico, Switzerland and the United Kingdom hold an election for delegates to the National Convention New York City. A delegation of nine Democrats Abroad attends. International Chair Toby Hyde casts the final votes in the roll call to nominate Jimmy Carter.
- 1976: Democrats Abroad begins its campaign with members of the Democratic National Committee (the DNC) for an amendment to the Charter of the Democratic Party in order to give Democrats Abroad membership on the DNC.
- 1977: Bob Strauss, the Chairman of the Democratic Party, grants time to the DPCA Chair, Toby Hyde, to persuade the full DNC to grant DNC membership to Democrats Abroad. The DNC amends the Charter of the Democratic Party and gives the DPCA four members on the DNC, having one aggregate vote.
- 1977: FEC Advisory Opinion (AO 1976-112) finds that Democrats Abroad is a party committee and that transfers of funds between party committees are not subject to contribution limits. But, the FEC also found that Democrats Abroad cannot be granted the status of a state party committee but must be a subordinate of the national party committee. (See also 13 July 1990 opinion of Patton, Boggs.)
- 1978: Democrats Abroad is given six voting delegates to the National Party Conference, and the DPCA holds its third international election to choose delegates.
- In the 1980s, Democrats Abroad continued the progress of the 1970s and expanded the activities of Democrats Abroad within the organization of the Democratic Party, particularly in the Association of State Democratic Chairs:
- 1980: More than 1900 Democrats participate in the Democrats Abroad Worldwide Postal Primary and elect 4 delegates and alternates to the National Convention in New York City. The delegation's T-shirts and political songs are a big hit and generate publicity.
- 1981: Washington Liaison position created by DPCA Chair Andy Sundberg; Martha Hartman was first appointee.
- 1982: A Democrats Abroad delegation of 12 (consisting of the DPCA Chair and Vice-Chair, the DNC members-at-large, and eight voting delegates and alternates) attend the Party Conference in Philadelphia.
- 1982: DPCA sponsors the first overseas political seminar in Brussels for Democrats Abroad, covering fundraising and public relations.
- 1983: Democrats Abroad is granted one voting representative on each of the four regional caucuses of the DNC.
- 1984: More than 2500 Democrats participate in the Democrats Abroad Worldwide Postal Primary, a 20% increase. The primary receives broad press coverage because its unique timing provides results ahead of the primaries occurring on the same day in the United States.
- 1984: A Democrats Abroad delegation of 20 attends the National Convention in San Francisco. DPCA Chair Andrew Sundberg casts the delegation's five votes in the roll call on behalf of the "more than 2,000,000 U.S. citizens living and working outside the United States."
- 1985: Democrats Abroad absorbs the Latin American Democratic Party (LADP), thus becoming the only entity at the DNC representing Americans residing outside the U.S. and its territories.
- 1985: Eugene Theroux appointed Exec Director and Thomas Fina Deputy Exec Director by DPCA Chair Dean Ferrier.
- 1986: Membership on the DNC and the number of delegates to the Democratic National Convention allocated to Democrats Abroad are doubled as a result of the merger with LADP.
- 1985: Thomas Fina appointed volunteer Executive Director.
- 1986: Monthly "Letter from Washington" begun by Executive Director Fina.
- 1986: First direct mail fund raising campaign run by the Executive Director, with DNC.
- 1986: DPCA Chair Dean Ferrier testifies before the House Subcommittee on Elections on behalf of amending the Voting Rights Bill to provide for the Write-in Ballot.
- 1987: The Democrats Abroad by-laws are amended to provide for increasing the numbers of electors eligible for electing members to the Democratic National Committee.

- 1987: DPCA registers with the Federal Elections Commission.
- 1988: After an energetic effort, the Democrats Abroad primary is recognized as a state primary. As a result, all U.S. consular posts are ordered to distribute primary ballots to those Democrats residing overseas who wish to participate in the overseas primary.
- 1988: First international meeting held outside Europe. 55 overseas Democrats from 12 countries attend a DPCA meeting in Atlanta, Georgia, before the Democratic National Convention.
- 1989: The number of country committees reaches 20.
- In the 1990s**, Democrats Abroad reached out even more to Democrats around the world, and made its voice heard on a number of important issues in Washington:
- 1990: Democrats Abroad discusses plans for changing the method of selecting delegates to the Democratic National Convention. Chair Sam Garst, a native Iowan, creates a caucus system used in all subsequent elections.
- 1990: Patton, Boggs & Blow memorandum of 13 July, 1990, advises DPCA and DNC of the legal status of Democrats and Republicans Abroad and explained that both must register with the FEC. Basis for our later forcing Republicans Abroad to register.
- 1991: Democrats Abroad adopts caucus system to elect Convention delegates.
- 1992: Democrats Abroad launches first international coordinated campaign. First ad campaign in major international newspapers supporting Democratic candidates cost \$26,000.
- 1992: Democrats Abroad successfully carries out a caucus system for the selection of our presidential preference and our delegates to the New York Convention. Members gather in local, regional, and global caucuses to cast their votes in an outstanding example of global democracy.
- 1993: Representatives from fifteen country committees attend President Clinton's inauguration.
- 1993: November: Chairman Peter Alegi launches campaign to include overseas Americans in President Clinton's universal health care system.
- 1993: On advice of the Executive Director, the DPCA hires former Republican Chief of Staff of the Senate Foreign Relations Committee to lobby for inclusion of overseas Americans. Country committees around the world contribute to funding.
- 1993: Democrats Abroad begins quarterly electronic publication in Paris of the *Overseas Democrat* under the editorship of Lois Grjebine and with technical support from Tom Fina. This is the first DPCA newsletter designed to provide country committees with ready-made text for local mailings.
- 1993: By unanimous vote, Democrats Abroad revises its bylaws in accordance with the changed political and administrative needs of a truly global organization. An Executive Committee is created to streamline management.
- DNC membership positions reserved for election by each of major world regions: Europe and Middle East, Asia, the Americas.
- 1994: Clinton Health Care legislation defeated in October, but our efforts had gotten overseas Americans included in drafts before the debacle.
- 1994: Democrats Abroad testifies on reform of citizenship legislation, suggesting "one-stop shopping," i.e., allowing applications to be filed abroad. The House sub-committee immediately accepts this idea and incorporates it into the bill, which becomes effective March 1, 1995.
- 1995: Executive Director arranges first time visit by delegation of Democrats Abroad to Oval Office led by Chair Peter Alegi to meet individually with President Clinton.
- 1995: Alice Lauthers succeeds deceased husband to be volunteer Assistant Treasurer in US.
- 1995: Incoming Chair Sally McNulty arranges successful European tour of Democrats Abroad by immediate past DNC Chair, David Wilhelm, who visits London, Paris, and Heidelberg.
- 1996: First non-European officer elected to DPCA—Carolyn Hansen from Taiwan.
- 1996: First non-European DNC member elected—Maureen Keating Tsuchiya from Japan.
- 1996: Executive Director negotiates procedure with Clinton White House to include Democrats Abroad in Presidential visits abroad.

- 1996: Creation of first Democrats Abroad website by Executive Director ([www.democratsabroad.org](http://www.democratsabroad.org)) in Washington overseen by Vice Chair Joe Smallhoover with webmaster in US; the site includes links to country committee websites. This made Democrats Abroad the first State Party to have a website.
- 1996: In order to make distribution of *Overseas Democrat* more rapid and less costly, operation shifted to Ruth McCreery in Yokohama who prepares page layouts that are transmitted as pdf files to web master who up-loads them to Democrats Abroad website for instant downloading and printing by country committees.
- 1996: DPCA Secretary takes over keeping of records of DPCA and Country Committee officer directory.
- 1996: DPCA convention in Toronto adopts resolution asking for inclusion of overseas Americans in census.
- 1996: E-mail begins to supplant fax as predominant communications medium with significant reduction in communications cost despite increased volume of communication.
- 1997: Sally McNulty leads Democrats Abroad in successful effort to maintain Section 911 of the tax code, the \$70,000 exclusion of earned income from U.S. federal income tax.
- 1997: Assistant U.S. Secretary of State Richard C. Holbrooke attends gala Democrats Abroad fundraiser in Paris.
- 1998: US funds transferred from Citibank, NY, to Burke & Herbert Bank & Trust, Alexandria, VA for better and more economical service as volume of income increased.
- 1999: June: Chairman Smallhoover testified before House Committee on Census in support of inclusion of overseas Americans in 2010 Decennial Census.
- 2000: In January, Andrew Goldberg is appointed Deputy Executive Director. First paid DPCA employee.
- 2000: DPCA spends \$115,000 for 2000 campaign advertising in Israel, Mexico, Canada, *Stars & Stripes*, *USA Today* and the *International Herald Tribune*.
- 2000: DPCA spends \$115,000 for 2000 campaign advertising in Israel, Mexico, Canada, *Stars & Stripes*, *USA Today* and the *International Herald Tribune*.
- 2000: Executive Director creates Emergency Committee to Reform Overseas Voting (ECROV) to provide proposals to reform Uniformed and Overseas Citizens Voting Act (UOCAVA) in light of 2000 election irregularities.
- 2001: DPCA hires lobbyist to help win changes in overseas absentee voting legislation.
- 2001: Executive Director testifies before House Committee on Census in support of inclusion of overseas Americans in decennial census of 2010.
- 2001: Help America Vote Act (HAVA) becomes law in October; it embodies important proposals made by ECROV.
- 2001: Andrew Goldberg becomes Executive Director upon the retirement of Thomas Fina, who becomes Executive Director Emeritus.
- 2004: At the National Convention, Democrats Abroad is moved forward in the roll call to its proper alphabetical order.
- 2008: The voting weight of Democrats Abroad is increased at the National Convention.
- 2008: Regional caucuses held to elect DNC regional representatives and delegates to the 2008 DNC Convention in Colorado. Global meeting held in Vancouver to elect further delegates and DNC members.
- 2008: Autumn meeting in Istanbul, Turkey, results in the creation of a formalized Resolution process and Resolutions Committee.
- 2009: The MOVE Act is signed into law by President Obama, written specifically to address problems encountered by overseas voters. Democrats Abroad quickly adopts new voter registration procedures and begins monitoring states' compliance with the law.
- 2010: International meeting in Florence, Italy. The DPCA Bylaws Committee presents the first draft of improvements to move towards proportional representation worldwide.
- 2010: Tim Kaine, DNC Chair, visits Paris.
- 2011: Tim Kaine, DNC Chair, visits London.
- 2011: International meeting in Seoul, Korea. Bylaws passed unanimously. Autumn meeting in Washington DC includes Doorknocks, which result in the formation of the FBAR/FACTA Taskforce.

2012: First Global Primary held in May 2012. Number of delegates from Democrats Abroad to the DNC Convention increases. The number of Country Committees reaches 51. DNC Chair Debbie Wasserman-Schultz distributes a video thanking Democrats Abroad members.

The following have served as Chair of the DPCA since it was first granted membership in the DNC in 1977:

<b>Anthony Hyde</b>	<b>1976-81</b>
<b>Andrew Sundberg</b>	<b>1981-85</b>
<b>Dean Ferrier</b>	<b>1985-89</b>
<b>Sam Garst</b>	<b>1989-90</b>
<b>Judi Rosenthal</b>	<b>1990-91</b>
<b>Peter C. Alegi</b>	<b>1991-95</b>
<b>Sally McNulty</b>	<b>1995-99</b>
<b>Joseph Small Hoover</b>	<b>1999-03</b>
<b>Rachelle Valladares</b>	<b>2003-05</b>
<b>Michael Ceurvorst</b>	<b>2005-07</b>
<b>Christine Schon Marques</b>	<b>2007-11</b>
<b>Ken Sherman</b>	<b>2011-Current</b>

## 2.2 Resources from the DPCA

### A. Marketing Tool Kit and Events-in-a-Box

A group of Democrats Abroad members with skills in graphic design and marketing contribute regularly to a resource called the Marketing Tool Kit. Logos, posters, and other materials are available on democratsabroad.org as part of the Marketing Tool Kit. One great advantage of using these resources is that they have been vetted by DPCA Counsel and comply with the relevant regulations and internal policies. Most of the resources are available on the democratsabroad.org website, although you're welcome to contact the Marketing Group for help and further resources.

For some specific events and campaigns, the DPCA distributes an Event-in-a-Box – a download-able collection of resources to help Country Committees. Recent Events-in-a-Box include the Global Primary and Voter Registration / VFA (Vote From Abroad website) / GOTV (Get Out the Vote), Memorial Day, and July 4<sup>th</sup>.

These resources are held in the International Leadership group, by event type, on democratsabroad.org.



### B. Letter from Washington

The Letter from Washington is an occasional feature, written by Tom Fina, Executive Director Emeritus, sent to our donor base and DPCA members, and posted on DemocratsAbroad.org.

### C. E-mail discussion groups (“listservs”)

#### INTERNATIONAL YAHOO GROUPS

1) The **DPCA-Leadership** Yahoo Group includes DPCA members plus Chapter Chairs, Country Committee Board Members, Committee Chairs, Appointed Officers and past DPCA members. Discussion is strictly limited to DPCA business. Discussion is moderated and membership is by invitation only. This group is a valuable source of the latest knowledge and advice about DPCA matters as well as leading a Country Committee. Please review the rules of this group in Appendix E5.

2) The **DemsAbroad** Yahoo Group is a general interest discussion forum for any overseas Democrats. Discussion is moderated and membership is open to all.

3) The **DPCAMembers** Yahoo Group was the predecessor to the DPCA-Leadership group and is now defunct. It was determined that, if there was specific information for DPCA Members only, such as a vote to admit a country committee, it would be sent out directly by email to the recipients.

Some Country Committees form local discussion groups. The Online Handbook includes a document with suggestions for creating a local discussion group.



## **D. Social Media: Guidelines for Country Committees**

Online services like YouTube, Twitter, and Facebook change quickly. Several country committees have a position or committee dedicated to social media, to develop strategies and to do daily or weekly postings. The most up-to-date resource for Country Committees is the Social Media Group on the democratsabroad.org website. Also, watch for the DPCA's media competitions and projects, like the "VFA goes to work" photo contest. To get started, this handbook addresses the most commonly used services: blogs and Facebook.

### **Blogs**

Readers have to take the initiative to go to a blog and read its content. Like magazines, blogs thrive or wither depending on their success in attracting and holding an audience. A well-designed blog will, like a good magazine, have a clear sense of its intended audience and provide a continuing stream of new material to attract repeat visits.

Don't post anything that isn't evidently interesting, useful, or entertaining. People visit blogs for informed opinion, humor, information that's hard to find elsewhere, or pointers they'll want to use. Web users simply won't revisit sites that don't reward them for their time.

So make it relevant, make it short, and use plain, powerful language.

Note, too, that the same basic rules should apply as when dealing with the press: bloggers must be very clear that they are speaking for themselves and not for Democrats Abroad, the Democratic Party or the U.S. government.

One interesting way to use blogs is to combine the blog with e-mail alerts to subscribers—the sort of thing big news sites do. A message might therefore alert subscribers to an upcoming Democrats Abroad event and contain the URL to the blog, where details are available.

Don't forget to include your blog address on the website pages for your Country Committee, and to let your members know about it.

### **Facebook**

As with blogs, a Facebook page is as effective as it is attractive. It is also interactive, making it much easier for your members (and others) to post comments on your Facebook page than it is to foster discussion on a blog.

A Facebook page is more likely to attract new members than a blog, given that they are much more likely to discover your page through friends or links from other pages. If you're getting started on Facebook, be sure to create a "page" rather than a "group" to make it as easy as possible for people to learn about your Country Committee. Also, note that the same basic rules apply as when dealing with the press: the administrators who post to the





Facebook page are speaking for themselves and not the Democratic Party or the U.S. government.

One thing to keep in mind is that a Facebook page requires more maintenance than a blog. A quiet Facebook page is off-putting, and if it is rarely updated, it may even hurt your organization's image more than having no presence on Facebook at all. At the other end of the spectrum, a contentious debate can spark interest, but generating conflict is counter-productive. Ultimately, the best person to maintain a Facebook presence is someone who already loves Facebook and uses it daily. There is a tone and a rhythm to a successful Facebook page.

A few more tips: Link to other Democrats Abroad pages; post regularly rather than in bursts; keep posts shorter than typical blog posts -- at most one paragraph. Finally, ask around! Democrats Abroad has lots of leaders on Facebook who are happy to share their expertise.

### **E. Democrats Abroad at Home / Friends of Democrats Abroad**

Democrats Abroad returning to the United States can still maintain ties with our organization by joining Democrats Abroad at Home. Contact the Executive Director for more information.

### **F. "State Abroad" Facebook pages**

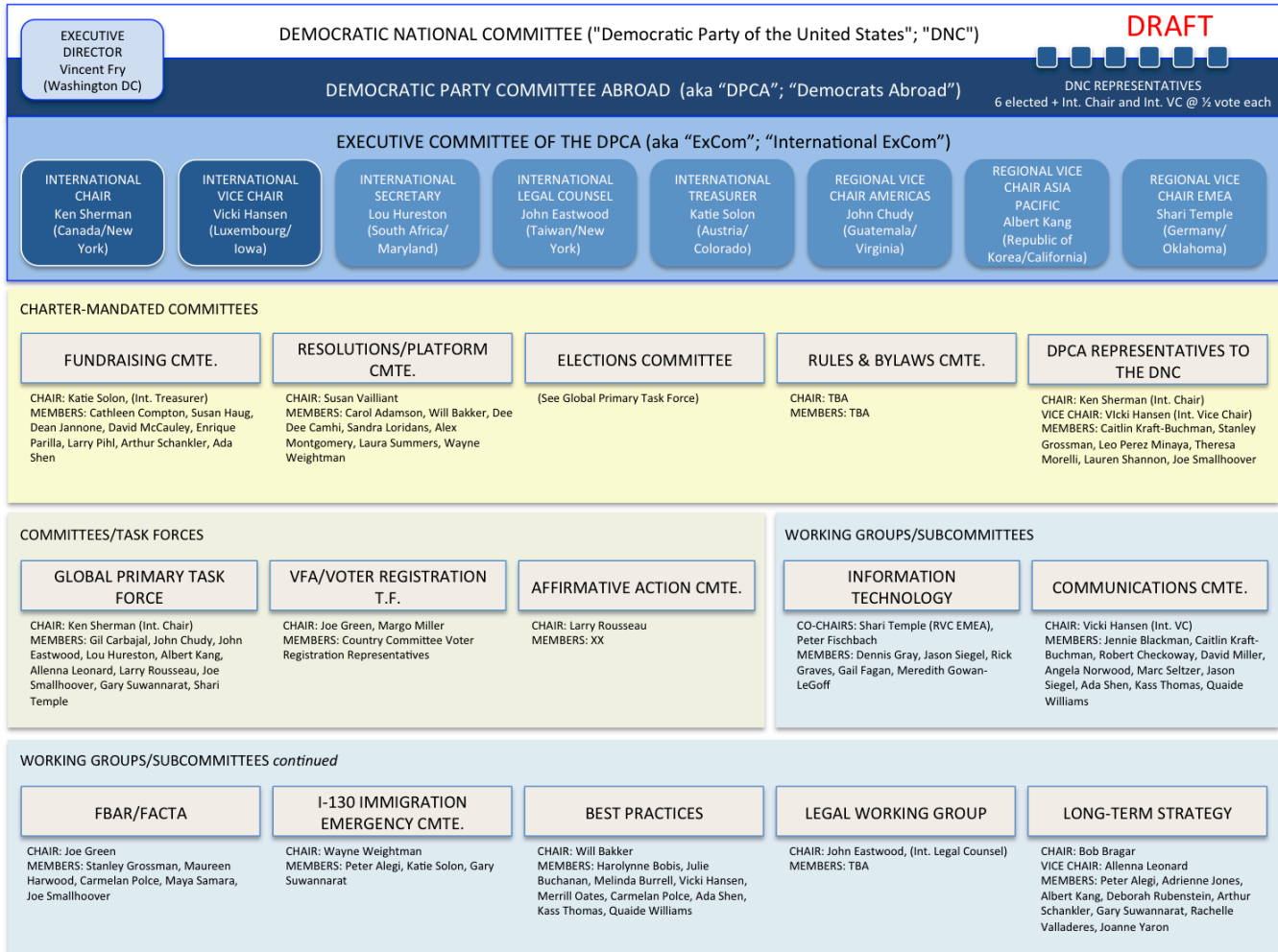
Facebook pages for each state (e.g. "Iowans Abroad") were created in 2012. This is a grass-roots movement open to those living abroad or within a specific US state. Members of the groups can share Democrats Abroad and VFA (Vote From Abroad) posts on a State Abroad page. Membership is not limited to members of Democrats Abroad, because the intention is to garner new members and share state-specific information as widely as possible.

### **F. The DPCA Press Officer and Your Media Contact**

The Press Officer is the primary media contact for Democrats Abroad. The Press Officer schedules interviews with members of Democrats Abroad, keeps members informed of updates and talking points, writes press releases, and provides media guidelines. Local committees should keep the Press Officer informed of any coverage by providing hard copies or links to articles or television coverage. For additional media support, see the *Appendices D1* through *D6*.

Each Country Committee (and possibly each chapter) should designate a local media contact and send his or her name and email address to [pressofficer@democratsabroad.org](mailto:pressofficer@democratsabroad.org). See Appendix D2 for some tips on appointing your Media Contact.

## 2.3 Committees of the DPCA



Please see Appendix E3: Committees of the DPCA for more information on select Committees.



## 2.4 Policy on Local Host-Country Politics

The question surfaces from time to time as to whether members of Democrats Abroad and/or any elements of Democrats Abroad may participate in local politics where they live, that is, outside the USA.

Our policy is that Democrats Abroad as an organization and its members as Democrats Abroad members are not to engage in local politics or take actions to work for or against host country governments. We are a direct part of the Democratic Party of the United States and at the same time guests of our countries of residence.

As an organization, we are concerned directly with U.S. politics and economics and their implementation. We direct our efforts to the U.S. government and U.S. voters and general public. As Democrats Abroad, we do not lobby foreign or host governments or their publics or take stands, as Democrats Abroad, on our host government's policies and workings.

A corollary is that Democrats Abroad websites do not publicize, for instance, marches on parliaments of our host countries re issue x or y or call for our members to be part of local demonstrations directed against the host governments or governments of other countries. We stay out of local and national politics other than those of the U.S.

Our means of furthering our agenda, e.g., on environmental standards or agreements outlawing torture, are focused on what the U.S. is and is not doing. Similarly, our Democrats Abroad meetings and the ability to contribute financially are open to members of Democrats Abroad, that is, only US voters who support the principles of the Democratic Party.

Please note that this policy does not address what individuals may do on their own, in purely private capacities, without reference to Democrats Abroad. We have no Democrats Abroad policy on that except that one's behavior can in exceptional circumstances be grounds for review of membership if behavior is inconsistent with the principles and values of the Democratic Party (e.g., advocacy or practice of slavery of any sort, for instance, including trafficking in people for any purposes).

## 2.5 Policy on Official Contacts Representing Democrats Abroad

As our reach within the Democratic Party grows, common sense requires us to assure that those who represent Democrats Abroad (DA) in any capacity are unified in discipline and message and that they always coordinate DA-related interactions with the Chair and the Executive Committee. This policy applies to DPCA officers, Democratic National Committee (DNC) members, Executive Director and other staff, Regional Vice Chairs, appointed officers/advisors and committee co-chairs or others officially representing Democrats Abroad on any subject. It does not apply when individuals exercise their right to speak to Members of Congress or other officials on a personal basis or as constituents when they shall not in any way represent themselves as speaking for or acting on behalf of Democrats Abroad.

The key to effective presentation of the views of DA is **coordination**, before, during and after contact with Members of Congress, federal or state agency officials, state legislatures, the DNC structure, and other state party organizations.

**1. Prior to DA-capacity visits:**

- a) All official visits to the above mentioned individuals and organizations will be made only upon the advance approval of or request to the Chair and Executive Committee. Only upon a very exceptional basis will visits by other than the relevant DPCA officers be outside the area of responsibility of the DA representative. If more than one individual is involved, the Chair, Vice Chair or Executive Committee will designate a lead spokesperson for the visit.
- b) The individual making any approved visits will notify the Executive Director of date, time and subject matter of each visit ten days or more in advance of the visit.
- c) The Executive Director shall be included automatically in the visiting party; the Executive Director will have full discretion whether or not to take part.
- d) The individual making an approved visit shall make all necessary arrangements and appointments. That individual may request the assistance of the Executive Director, but the Executive Director is not responsible for making appointments or confirmations unless mutually agreed. Nor is the Executive Director responsible for hotel, transportation or other logistical arrangements for visitors, unless requested in advance by the Chair, Vice-chair or Executive Committee.
- e) The Executive Director will provide the DA visitors with the latest DA policy/talking points on issues to be discussed, if any, and other appropriate background.

**2. During DA-capacity visits:**

- a) If the Executive Director decides to accompany, the Executive Director may be present at all times during the visit and shall be introduced to the person/organization visited with full identification as Executive Director, Democrats Abroad. The Executive Director may fully participate in any discussions at the Executive Director's discretion.
- b) The Executive Director shall take minutes of the visit if in attendance. The visitor will otherwise minute his/her visit for DA Executive Committee through the Executive Director.
- c) If continued or follow-up actions result, the Executive Director will be identified to the person/organization visited as the point of contact for further coordination. Note: If the Chair/Vice Chair or Executive Committee determines that the Executive Director's functioning as point of contact for follow-ups is counter-productive for any reason, another individual, e.g., the person making the visit or someone else, may be so designated.

**3. Following DA-capacity visits:**

- a) If the Executive Director does not participate, the individual(s) shall assure that the Executive Director is provided accurate and complete minutes within 3 working days of the visit. Minutes shall include names of all participants, a clear description of subjects discussed, and specification of any further action or coordination.
- b) If the Executive Director participates, the minutes will be formalized and coordinated by the Executive Director with other attendees within the three working days.
- c) In either case (3a or 3b), the minutes shall be presented to the Chair and DA Executive Committee within ten working days of the visit.
- d) The Chair and/or Vice Chair, working with the Executive Director and Executive Committee, shall have final authority on actions or follow-up agreed to during any meeting.

The above policy does not apply to attendance at DNC meetings by Democrats Abroad DNC members, including the Chair and Vice Chair, nor does it apply to Chair and Vice Chair attendance at meetings of the DNC Executive Committee or any meetings of the Association of State Democratic Party Chairs or its subordinate groups.

## 2.6 Tips on Planning Events and Activities

Holding regular events is crucial to doing good outreach to potential new members, building leadership in your committees, maintaining momentum and support, and achieving our overall goal of getting Democrats to vote! It is best to offer a varied program of monthly events to appeal to different types of members, from social events to documentary showings with an entry fee to speaker events. Other best practices include:

- Hold events at different times of the day and day of the week, in different locations, so you can reach more people
- Use the variety of events to reach out to different people who might have different motivations for joining Democrats Abroad; some to meet new people, some to discuss American topics with other Americans, some for activism, some for learning
- Always pass around a sign up sheet so you can contact people again
- Always have information about the next event to share at the current event, to entice people to the next event and maintain momentum
- Consider co-hosting an event with another group, or piggy-backing on someone else's event – for example, passing out DA flyers at a political speech sponsored by a local university
- Phonebank your entire membership at least once a year and get the members' ideas about the types of events they'd like to see
- Get different members of your committee to plan and hold events, as this spreads the burden of effort, builds leadership skills, and lets you reach new circles of Americans
- *Remember at each event to consider a fundraising and voter registration angle!*

### **Social events**

- Create a variety of social events where people can have fun and get to know each other – happy hours, movie nights, Superbowl parties, wine and cheese evenings, book groups, etc
- Create a signature event that your country committee replicates yearly, whether Fourth of July or a holiday party or whatever is appropriate in your context
- As the campaign season heats up, download and show political coverage/montage of political events back home, or hold debate watch parties
- Organize service activities to get new people engaged – pick an organization to support, US focused or locally focused
- Convene yearly town hall meeting with new Embassy staff or other important figures such as DNC chair or DNC members

### **Issues fora / policy development**

- Offer members chance to join interest groups – policy groups and caucuses on particular issues of interest to members in your chapter, possibly even creating policy action networks to discuss and take action on issues which appeal to different audiences.
- Hold discussion meetings on issue basis in bars and homes, and tap intellectual capacity of Americans living in your country for these discussions
- Combine discussion with related action, whether social or political: Young Dems go iceskating and talk about global warming;
- Consider a series of discussion sessions coordinated in chapters around the country that lead up to a big event happening in your country such as an important global conference or a major speaker coming to town
- Hold themed events such as something for International Women's Day to raise funds for a local NGO, and reach out to other American based groups such as women's group for co-sponsoring events

## 2.7 Tips on Fundraising for Democrats Abroad

We raise funds for all the important voter registration and mobilization work we do, from websites to advertisements to communication materials. Democrats Abroad can receive funds to a total not exceeding the FEC or congressionally-mandated limit, from any US citizen or bona fide green card holder 18 years or older<sup>7</sup>. These funds are not tax-deductible. **We cannot receive funds from non-US citizens who are not bona fide green card holders, nor can we receive in-kind donations of goods or services for which those people normally would charge (meeting space, refreshments, etc).** However, we can receive in-kind donations such as performances by non US citizens.

US Citizens and bona fide green card holders are permitted to donate up to \$30,800 per year towards a national party committee such as Democrats Abroad. In this Handbook, see Sections 1.4 and 1.5, and Appendix C1.

### **What is the basic process?**

- Let the Democrats Abroad Executive Director know that you are holding a fundraiser, who will then create a mechanism on the Democrats Abroad webpage that will allow people to pay for tickets and make donations towards your event. You can agree with the Executive Director how much of the funds raised will go to your country committee and how much will go to Democrats Abroad; however, each committee is expected to provide a portion of the funds raised to the national committee.
- Hold the event
- Send thank you notes as well as notification of the next event (whether or not it is a fundraiser) for follow up.

### **For Democrats Abroad, this means you should:**

- Create a fundraising goal for your committee
- Identify who are your best fundraisers, ideally several, who enjoy speaking about Democrats Abroad and don't mind asking people for financial support for a very important cause. Don't assume the country chair is good fundraiser.
- Remember that if you don't ask, you don't get!

### **Fundraising best practices (see attached wording for certification of funds)**

- There are many different ways you can raise funds, from low-key events to gala affairs:
  - Encourage your members to contribute \$10 each per year (or more!), via the website ([www.democratsabroad.org](http://www.democratsabroad.org))
  - Pass the hat at monthly Dems Abroad happy hours or debate watching parties
  - Hold your own or join others' bake sales or garage sales
  - Sell your own Dems Abroad t-shirts or other merchandise
  - Hold raffles or auctions
  - Design events specifically for fundraising; charge a "suggested donation": progressive dinners, wine tours, jazz nights, whatever you and your committee dream up
  - Create a fundraising challenge for special events or dates, with one donor agreeing to match others' contributions

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<sup>7</sup> Per the Federal Election Campaign Act, contributions to Democrats Abroad (or any national party committee) are not tax deductible as a charitable contribution for federal income tax purposes. Also, if requested Democrats Abroad is required to report the name, mailing address, occupation, and employer for each individual whose contributions aggregate in excess of \$200 in a calendar year. See Sections 1.4 and 1.5 above, for additional details.



- Keep track of your donors and thank them for their support -- reward longstanding big donors by planning a special “big donors” event: a private cocktail party at a nice venue with a distinguished guest, etc
- Reach out to Democrats in other countries (including friends and family in the US!) or other potential supporters and encourage them to give a donation for your event

***Wording for certification of funds (per the Democratic party website)***, for contributions over \$200, we must collect the name, address, and employer of the person donating.

1. I am a United States citizen or a lawfully-admitted permanent resident.
2. I am at least 18 years old.
3. This contribution is not made from the general treasury funds of a corporation, labor organization or national bank.
4. This contribution is not made from the funds of a political action committee.
5. This contribution is not made from the treasury of an entity or person who is a federal contractor.
6. This contribution is not made from the funds of an individual registered as a federal lobbyist or a foreign agent, or an entity that is a federally registered lobbying firm or foreign agent.
7. The funds I am donating are not being provided to me by another person or entity for the purpose of making this contribution.



## Appendices

## Appendix A1: Membership Form Sample Text



This form is also available in the online handbook as a PDF file, with two forms per page.



## Democrats Abroad Join Form

To join Democrats Abroad, please complete this form and sign below.

Democrats Abroad keeps all personal data confidential. Members must first sign a confidentiality agreement before getting access to member data. [www.democratsabroad.org/privacy\\_statement](http://www.democratsabroad.org/privacy_statement)

Name and address (in non-US resident country):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone:

Home: \_\_\_\_\_ office: \_\_\_\_\_

Mobile: \_\_\_\_\_ fax: \_\_\_\_\_

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

“Voting Address” -- last residence in the U.S. (last legal residence):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Birth Date: \_\_\_\_\_, \_\_\_\_\_

month day year

How long do you expect to live abroad? temporarily indefinitely.

If temporarily, when do you expect to return to the USA? \_\_\_\_\_

Want to volunteer to help at DA events? Yes No Maybe

Are you a U.S. citizen? Yes No

(You must be a U.S. citizen to join Democrats Abroad.)

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





## Appendix A2: Contribution Form Sample Text



There is also an online contribution form, as mentioned in Sections 1.4 and 2.7. A printable version of the Sustaining Donor form is available on [democratsabroad.org](http://democratsabroad.org).

### YOUR CONTRIBUTION IS IMPORTANT!

\_\_\_ Yes! I want to help Democrats Abroad fund its urgent grassroots campaign to elect Democrats to office, all across the United States. That is why I am sending Democrats Abroad my contribution today.

Amount: \$ \_\_\_\_\_

Contributions to Democrats Abroad may only be made by US citizens and bona fide permanent resident aliens and are not tax deductible as charitable contributions.

All checks should be drawn in U.S. dollars against accounts maintained by banks in the United States. Checks should be made payable to "DEMOCRATS ABROAD" and sent to Democrats Abroad, P.O. Box 15130, Washington D.C. 20003-0130, U.S.A.

I confirm that the following statements are true and accurate: 1) I am a United States citizen or a bona fide permanent resident alien. 2) This contribution is not made from the general treasury funds of a corporation, labor organization or national bank. 3) This contribution is not made from the treasury of an entity or person who is a federal contractor. 4) The funds I am donating are not being provided to me by another person or entity for the purpose of making this contribution.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Federal Election law requires political committees to report the name, mailing address, occupation and name of employer for each individual whose contributions aggregate in excess of \$200 in a calendar year. Your contribution will be used in connection with Federal elections and is subject to the limits and prohibitions of the Federal Election Campaign Act. Your contribution is not tax-deductible as a charitable contribution for Federal income tax purposes.

\_\_\_\_\_  
Employer's Name

\_\_\_\_\_  
Employer's Address

### WE NEED VOLUNTEERS! YOU CAN HELP.

\_\_\_ I can't afford to contribute financially to Democrats Abroad, but I want to participate in Democrats Abroad's global effort to promote the Democratic Party's agenda. Put my name down to help with:

- |                             |                   |
|-----------------------------|-------------------|
| ___ Voter Registration      | ___ Canvassing    |
| ___ Mailing Parties         | ___ Speaking      |
| ___ Fundraising             | ___ Grass Roots   |
| ___ Electronic Organization | ___ Phone-banking |
| ___ Other ( _____ )         |                   |

Paid for by the Democratic Party Committee Abroad – 430 S. Capitol St. SE, Washington, DC 20003.  
This communication is not authorized by any candidate or candidate's committee.



## Appendix B1: Contact Information Form for Start-ups

*In-formation Country Committees may use this form to collect membership data.*

CONTACT INFORMATION FOR \_\_\_\_\_ (country)

DATE: \_\_\_\_\_

***Thank you for your interest in Democrats Abroad and helping Democrats win!***

\_\_\_\_\_  
Name

\_\_\_\_\_  
Current Home Address

\_\_\_\_\_  
City                      Country                      Zip code

\_\_\_\_\_  
Mailing Address, if different

\_\_\_\_\_  
Home Phone                      Business Phone

\_\_\_\_\_  
Mobile Phone                      Fax

\_\_\_\_\_  
E-Mail                      Skype ID

\_\_\_\_\_  
Occupation

\_\_\_\_\_  
Employer

US Passport Number: \_\_\_\_\_

Please send a copy of your passport photo by fax to the Executive Director of Democrats Abroad at +1 (202) 575-7860. Or mail a copy to Democrats Abroad / PO Box 15130 / Washington, DC 20003-0130 / U.S.A.

U.S. Voting State                      City                      County                      Zip code

Please return your completed form to Executive Director, Democrats Abroad at:  
ED@democratsabroad.org

## Appendix B2: Jump-Start a Committee

### **CASE STUDY: BELGIUM** by Kevin Prager, from 2007 DPCA Handbook

Democrats Abroad Belgium (DAB) got off to a very fast start by focusing on a few actions that were the most likely to yield quick results, and by taking advantage of every free or inexpensive resource and opportunity it could find. Within the space of a year, membership grew from nearly zero to 500!

#### **The main pillars of its early success were:**

1. Finding a few committed volunteers (initially three) willing to help.
2. Identifying communications vehicles (journalists oriented to foreign residents, websites, publications, clubs and e-mail discussion groups) that it could use to reach Americans and crafting brief written messages targeted at them.
3. Forcing prospective members and event attendees to contact us or register via email, so that we could track and keep their contact information.
4. Using the tools and resources provided by DPCA when we could.

#### **A Few Good People**

First, the acting chairman located two other volunteers willing to commit some time and effort to launching the organization. Each was asked to check among the Americans they knew who could supply email addresses of potential members. They were also asked to get email addresses or websites of clubs for foreign residents, websites, e-mail discussion groups, and publications used by Americans. Lists were created. As people joined up, we also surveyed them on what their capabilities and areas of interest were, with a view to identifying a lawyer for counsel work, a journalist to edit a newsletter, a web-savvy person to edit the website, a PR person to work external communications, a financial person or accountant to be treasurer, a sales person to run fundraising, competent and organized people to be in charge of membership growth and voter registration, an events organizer to run events, and so forth.

#### **Publicity, Publicity, Publicity**

External communications were the top priority in the beginning. Getting and using a comprehensive publicity email list allowed DAB to multiply its force in terms of encouraging attendance at events, interest by journalists, and brand association by other groups of American citizens resident overseas. When advertising an event, we *never* gave out the address of the venue—rather, just the time, date and city, along with an email address to contact for more information. This rule has allowed DAB to reduce concerns about security while ensuring that we gathered e-mail contact information for every interested American. Bear in mind that one article covering your organization in a foreign-resident-oriented publication or club newsletter is worth 1,000 posters hanging in supermarkets and bars!

We also designed our messages (postings, press releases) for external communications to minimize the fact that we were the Democratic Party in the beginning, and focused more on bringing in Americans opposed to the Bush administration, as many people are reluctant to join a party until they see real local value (i.e. come to events or get help with voter registration). Later, once you are established, your communications power gives you a service to trade for cross-branding opportunities with other organizations for American citizens residing abroad (i.e. a chip at the negotiating table when they want you to participate in an event). Never give your publicity list to anyone!

#### **The New Frontier**

This is most important for the reason stated in the last paragraph—getting and keeping prospective members' email addresses for future events. But it also means that you have less strict legal requirements as on paper communications. And the cost is nothing compared to mail-shots, posters and advertisement. Also, email communications and posting to websites are easier and faster to create, and web-postings can usually be changed or corrected even after posting. If you use [www.evite.com](http://www.evite.com), you can easily manage your events, track attendance, change or add to the agenda and selectively email attendees. If you use [www.skype.com](http://www.skype.com), you can call or conference call your super-volunteers or officers for free (if they download it, too).



### **Shoe-String Budget**

DAB used the two very good tools offered by DPCA to its advantage, since we had no funds—the membership database and the DPCA website (which can give you a country page). We also joined DPCA conference calls with the Democratic presidential candidates (advertising them as members-only DAB events), which gave us an interesting hook with the local press and credibility with prospective members. Lastly, we obtained the email addresses of the chairs of neighboring DA countries and started inviting those chairs to every event in Belgium. This created a virtuous circle of invitations, and sometimes we were able to offer/publicize neighboring-country events to our own members, adding to our credibility. We also identified local organizations (restaurant, law firm) that would let us hold our meetings in their space for free or the ability to charge individual attendees for their drinks and food. We always accept donations (watching out for cash donation limits and U.S. citizenship requirements).



## Appendix B3: First Step, The Organizational Meeting

The first step to starting a Democrats Abroad Country Committee is to call a preliminary organizing meeting and then an official organizational meeting. The materials below can be adapted for local use – all highlighted text needs replacing. Don't hesitate to contact your fellow Democrats Abroad for more help – especially your Regional Vice Chair.

### 1. The Preliminary Meeting Invitation: Choosing a Date

#### Invitation to U.S. Citizens in Country

Dear All,

Several of us are working together to jump-start Democrats Abroad in COUNTRY, with the major objective of mobilizing voters to elect Democrats in 2012 and the future.

We need to organize, make our presence felt, and increase the number of voters that will help bring about change in the United States.

We are planning to gather interested people in COUNTRY for a preliminary meeting in the near future. We have suggested some potential dates below, and need to know whether you would be interested in participating and when you will be available.

#### Meeting Goals

For the preliminary meeting, I would like to:

- gather everyone and introduce ourselves
- establish which issues and activities people want to progress
- collect ideas on how to push those issues
- list potential members or political/useful contacts
- find out who are members of other groups useful for force multiplication
- determine which people would want to lead which areas
- ask how often people would be willing to meet

#### Your Input Needed!

- I need to know which of the dates listed below you can make. Please list, in your order of preference, the date/s you could conceivably make and reply by email to [email@domain.suffix](mailto:email@domain.suffix).
- I am open to suggestions for content in the meeting. Any ideas/advice?
- I would also be grateful for any names and email addresses you have for U.S. citizens you think would be appropriate to contact about coming aboard, and if you could forward the meeting information and request to help bring others on to like-minded Americans.

#### Potential Dates

Suggested Venue (ADDRESS)

- A. DATE/TIME 1
- B. DATE/TIME 2
- C. DATE/TIME 3

We will choose the date that the most participants can attend and inform you via email.

With best regards,

YOUR NAME

Democrats Abroad COUNTRY Start-up



## 2. Follow-up to Preliminary Meeting Invitation: Choosing a Date

As a follow-up to the message I sent last week on behalf of Democrats Abroad **COUNTRY**, please let me know if you might be available on **DATE/TIME 1, DATE/TIME 2** and/or **DATE/TIME 3** at **ADDRESS**

Please let me know.

With best regards,

**YOUR NAME**

Democrats Abroad **COUNTRY** Start-up

## 3. Meeting Invitation

### Meeting of the Democrats Abroad **COUNTRY** Start-up

#### **DATE**

Democrats Abroad are gathering interested Americans (not necessarily registered Democrats!) in **COUNTRY** for a preliminary meeting on **DAY DATE TIME** (details below). The main objective is to let people get involved in volunteerism and grass-roots activities aimed at helping bring about positive changes in the U.S. (and global) political, economic and social landscapes. The date was chosen to allow the maximum number of people to attend, following a vote.

#### Meeting Goals

- Gather everyone and introduce ourselves
- Establish issues and activities that people want to work on
  - e.g. Voter registration; Cyber-activism; joint meetings with other groups; speakers; fund-raisers; etc.
- Collect ideas on how to push those issues
- List potential members or political/useful contacts
- Find members of other groups useful for force multiplication
  - e.g. US Embassy; US Mission; **US MILITARY BASE**; American Chamber of Commerce; American Women's Club; American Men's Club; American-**COUNTRY** Association; American Theater Society; American Club; etc.
- Determine which people would want to lead which areas
- Establish how often people would be willing to meet; set date of next meeting

#### Your Assistance Needed!

- I am open to suggestions for content in the meeting. Please email me any ideas/suggestions.
- I would be grateful for any names and email addresses you have for U.S. citizens in **COUNTRY** that I could contact about participating, and if you could forward this text on to like-minded Americans—generally spread the word.

#### Meeting Logistics

Time: **TIME**

Date: **DATE**

Venue: **ADDRESS; CITY CODE; TEL NUMBER; (description if needed)**

**Include a map and driving, walking and/or public transport directions.**

Hope to see you there,

**YOUR NAME**

Democrats Abroad **COUNTRY** Start-up

#### 4. Meeting Agenda

**Democrats Abroad COUNTRY Start-up Meeting Agenda**  
**date – time- address**

**Introductions**

**DA COUNTRY Statement of Intent - What & Why**

**DISCUSSION OF POTENTIAL ISSUES, ACTIVITIES & LEADERSHIP**

- Voter registration
- Cyber-activism
- Fund-raisers
- Speakers
- Joint meetings with other groups
- Other suggestions, e.g. Political brunches
- Assignment of leaders, volunteers & goals for next meeting

**Internal Roles (acting)**

- Steering Group
- Press Relations/Publicity
- Lawyer for by-laws
- Treasurer

**Force Multiplication: Determine liaison people for other useful groups (EXAMPLES)**

- US Embassy
- US Mission
- US MILITARY BASE
- American Chamber of Commerce in COUNTRY
- American Women's Club CITY
- American Men's Club of CITY
- American-COUNTRY Association
- American Theater Society
- American Club of CITY
- Similar non-US political parties
- Expat Publications, web & print
- Other suggestions
- Assign contact goals for next meeting

**Membership**

Request: each participant endeavor to bring aboard 3 people by next meeting  
Request: systematic forwarding of meeting invitations  
All present should complete and sign the membership form, or join online during the meeting

**Logistics**

Establish meeting frequency  
Set date of next meeting  
Determine alternate venues (if necessary)

**ANY OTHER BUSINESS**

**MEETING CLOSE**

**OPEN DISCUSSION & DRINKS**

**Registered Attendees: LIST**





## 5. Official Organizational Meeting

After a preliminary meeting, the start-up must hold an official organizational meeting at which it elects officers and adopts bylaws in order to be admitted to Democrats Abroad as a full Country Committee. The organizational meeting must be advertised publicly.

### **Sample of Public Notice for the Organizational Meeting**

#### ***Customize to Meet the Publicity Requirement***

"Attend the first organizational meeting of Democrats Abroad **Country** on \_\_\_\_\_, 2006 at \_\_\_\_\_ **(fill in place)** at \_\_\_\_\_ **(fill in time)**. Democrats Abroad is the official organization of the Democratic Party of the United States representing US citizens living temporarily or permanently outside the US. Membership is open to all US citizens 18 years of age or older who adhere to the ideals and principles of the Democratic Party of the United States.

We will be adopting the initial bylaws of Democrats Abroad **Country** and electing a Chairperson, Vice Chairperson, Secretary, Treasurer, and Counsel.

There are millions of US citizens living outside the US. Make your voice heard."

## Appendix B4: Model Bylaws for Country Committees

The Bylaws Committee is a standing committee of Democrats Abroad. It is charged with adopting model bylaws for country committees. The model bylaws adopted October 2006 are set out below. The Model Bylaws will be changed due to 2011 changes to the DPCA Charter, so be sure to check the Online Handbook before composing new bylaws or revising current Country Committee bylaws.

**DEMOCRATS ABROAD** \_\_\_\_\_ **BYLAWS**  
adopted on \_\_\_\_\_ amended on \_\_\_\_\_

### Article I: Name

These Bylaws govern an organization having as its name Democrats Abroad \_\_\_\_\_.

### Article II: Purpose and Relationship to Democrats Abroad

2.1 The organization shall apply for admittance to the Democratic Party Committee Abroad (the DPCA) as a Country Committee within Democrats Abroad.

2.2 The purposes of the organization shall be to advance the interests and ideals of the Democratic Party of the United States (the Democratic Party) and of Democrats Abroad, as stated in the Charter of the Democratic Party (currently Section 17) and the Bylaws of Democrats Abroad and to provide for appropriate action by its supporters residing in \_\_\_\_\_.

### Article III: Members

3.1 Members must be citizens of the United States, of voting age, who subscribe to the principles of the Democratic Party of the United States and of Democrats Abroad and are resident in \_\_\_\_\_. A member who by her or his actions demonstrates that she or he no longer subscribes to the principles of the Democratic Party of the United States and of Democrats Abroad may be excluded from membership by a two-thirds vote of the members of the Executive Committee; provided however that such vote may only be taken after the member has had reasonable notice (no less than 30 days) of the Executive Committee's intention to exclude the member and has had reasonable opportunity to contest the proposed action by the Executive Committee.

3.2 To the greatest extent possible, all the various elements of the Democratic Party and of the Democratic Party community in \_\_\_\_\_ shall be represented within the organization.

3.3 The current list of members as maintained by the Secretary pursuant to Article VIII shall be delivered to the appropriate officers of the DPCA no later than January 31 of each year in such form and format as the DPCA shall from time to time require.

3.4 To join Democrats Abroad \_\_\_\_\_, the member must complete a membership form using such paper or other medium (e.g., online form) as the Executive Committee shall from time to time make available including information on the member's name, mail and email addresses, telephone and fax numbers and U.S. voting district State and other information contained on the membership form.

3.5 By becoming a member of Democrats Abroad \_\_\_\_\_ the member consents to the delivery of his/her name, mail and e-mail addresses, telephone and fax numbers and U.S. voting district/State and other information contained on the membership list of the organization to the DPCA and to such lawful use thereof as the DPCA shall make from time to time. Membership in Democrats Abroad \_\_\_\_\_ automatically results in membership in Democrats Abroad.

3.6 Each member has the right to inspect and correct the member's data in the membership records. Membership records shall otherwise not be open to inspection except by the Executive Committee and persons authorized by it, notably the database manager. The membership records shall be maintained by the Secretary in such a manner in order to protect the information therein, pursuant to applicable data protection rules. No use of the membership database is permitted for purposes other than those related to the activities of the Democratic Party, of Democrats Abroad or of Democrats Abroad \_\_\_\_\_. No candidate for any office may use or access the membership database directly for the purposes of campaigning for office or soliciting votes or proxies.

### Article IV: Cessation of Membership



Any member shall cease to be a member if he/she no longer meets the qualifications of a member. Any such former member may be reinstated on the same conditions as a new member.

#### **Article V: Officers**

The Officers of the organization shall be the Chairperson, Vice-Chairperson, Secretary, Treasurer and Counsel to the Committee. The Vice-Chairperson shall be of the opposite sex from the Chairperson.

#### **Article VI: Chairperson**

The Chairperson shall be the chief executive officer of the organization, shall call and preside at all meetings of members and of the Executive Committee, establishing the agenda of such meetings, and shall have responsibility for all activities approved by the organization. The Chairperson shall sit ex-officio on all committees and subcommittees of the organization including Standing Committees, with full voting privileges.

#### **Article VII: Vice-Chairperson**

In the absence of the Chairperson, the Vice-Chairperson shall call and preside at meetings of members and of the Executive Committee. The Vice-Chairperson shall have such other duties as the Chairperson shall define.

#### **Article VIII: Secretary**

The Secretary shall maintain a current list of members of the organization (containing the name, mail and e-mail addresses, telephone and fax numbers and U.S. voting district/State and such other information as the DPCA may from time to time require), minutes of all meetings, and all files and administrative records of the organization. The minutes books shall be open for inspection by members.

#### **Article IX: Treasurer**

The Treasurer shall manage the finances of the organization, maintain its financial reports to members and make and maintain such financial reports as may be required by law (including without limitation the laws and regulations of the United States and the several States applicable to political parties and contributions to them). All such records shall be open for inspection by members. The Treasurer shall consult with the International Treasurer of Democrats Abroad from time to time on matters concerning the maintenance of financial records and financial reporting (notably to the United States Federal Election Commission).

#### **Article X: Counsel**

The Counsel shall be available for consultation by the Committee or its officers on legal and procedural questions relating to Democrats Abroad \_\_\_\_\_ and its activities. The Counsel shall consult with the International Counsel from time to time on emergent matters, including notably questions on voting issues and financial record keeping.

#### **Article XI: Executive Committee**

11.1 The Executive Committee shall be composed of the Chairperson, Vice-Chairperson, Secretary, Treasurer and Counsel to the Committee and two Members-at-Large elected from among the eligible members of the organization. The chairpersons of the Standing Committees shall be ex-officio members of the Executive Committee with full voting privileges.

11.2 The Executive Committee shall meet at regular intervals upon call by the Chairperson, for the purpose of consulting with and advising the Chairperson in the administration of the organization. A meeting of the Executive Committee may be called by one-third of the Executive Committee.

#### **Article XII: Committees**

12.1 The Committee shall have the following Standing Committees: Membership/Voter Registration, Issues, Programs/Special Events, Fund-Raising and Newsletter/ Communications.

12.2 The Chairperson may create one or more ad hoc committees, with such functions and responsibilities as he/she shall designate.

12.3 The Chairperson shall appoint or remove the chairpersons of the Standing Committees and the ad hoc committees (if any), subject to ratification by the members of the Executive Committee at the meeting of the Executive Committee next following such appointments or revocation. The membership

of each such committee shall be selected by the committee chairperson after consultation with the Chairperson.

12.4 Meetings of all committees shall be open to all members of the organization.

**Article XIII: Other Officers**

The Chairperson may appoint and remove such assistant Officers or honorary Officers, having such duties as he/she shall designate, subject to ratification by the members of the Executive Committee at the next meeting of the Executive Committee.

**Article XIV: Terms**

14.1 The Officers and Members-at-Large of the Executive Committee shall be elected every two years at the annual meeting of the organization (which meeting shall be held no later than March 31). They shall be elected for a term expiring upon the election of their successor. No Officer can serve more than two consecutive terms in the same office.

14.2 The terms of all incumbent assistant Officers and committee chairpersons shall automatically expire upon the election of new Officers in accordance with the foregoing paragraph.

14.3 Any Officer or Member-at-Large who misses three consecutive regularly called meetings of the Executive Committee may be removed from office by a three-fourths vote of the entire Executive Committee at a regularly called and quorate meeting at which the question of such removal is on the agenda sent out in advance and at which the Officer or Member-at-Large is given due opportunity to explain the reasons for her or his absence.

**Article XV: Nominations**

15.1 At least two months prior to the annual meeting, a committee to nominate candidates (the Nominations Committee) for election to office shall be named by the Chairperson with the approval of the Executive Committee.

15.2 At the meeting approving the appointment of the Nominations Committee, the Executive Committee shall decide, in view of local circumstances and to promote the greatest participation, whether the elections shall be conducted (i) by mail ballot (to be counted at the annual meeting), (ii) by vote (in person or by proxy) held at the annual meeting and shall adopt the rules with respect to the election.

15.3 The Nominations Committee shall notify its nominations to the membership no less than 30 days prior to the annual meeting.

15.4 If the elections are to be conducted by mail or by electronic processes (e.g. email, web), any member of the organization wishing to run for office as an Officer or a Member-at-Large of the Executive Committee and not nominated by the Nominations Committee shall declare his/her candidacy at least 14 days before the annual meeting by a letter, fax or email addressed to the Chairperson of the Nominations Committee. The Secretary shall send ballots by mail, fax or email to the membership of the organization no earlier than 13 days before the annual meeting and no later than 10 days before such meeting.

15.5 If the elections are to be held by mail, fax or email ballot, no nominations may be made from the floor except when there is no declared candidate for an office to be filed. If the elections are to be conducted by vote (in person or by proxy), nominations for all positions to be filled may be made from the floor of the annual meeting.

15.6 In the case of a special election held to fill a vacancy pursuant to Article XVII, the Nominations Committee shall be appointed immediately upon the occurrence of the vacancy and shall notify its nominations to the membership no less than 30 days prior to the meeting at which the special election will be held (which meeting shall be no less than 30 days and no more than 45 days from the date of the vacancy as per Article XVII).

**Article XVI: Elections and Removal from Office**

16.1 The Officers and Members-at-Large of the Executive Committee shall be elected by a majority of votes of (i) the members voting (in person or by proxy) at the annual meeting (or in the case of a vacancy, at the general meeting at which the election is held) or (ii) by mail, fax or electronic ballot (e.g. email, web) counted at the annual meeting (or in the case of a vacancy, at the general meeting at



which the election is held). In the event of an election to be held by mail ballot, ballots received by mail shall be kept unopened and delivered to tellers appointed by the meeting to count the votes.

16.2 Any Officer or Member-at-Large of the Executive Committee may be removed from office by a vote of two-thirds of (i) those present at a duly convened meeting of the membership or (ii) those voting in a duly organized vote by mail or electronic ballot (e.g. email, web) on the question. Notice of any meeting under this Section 16.2 must be given in writing to the membership at least 30 days in advance.

16.3 If the position of Chairperson becomes vacant for whatever reason, the Vice-Chairperson shall succeed to the office of Chairperson and elections shall be held to fill the office of Vice-Chairperson in accordance with Article XVII.

#### **Article XVII: Vacancies**

Any vacancy among the Officers or the Members-at-Large of the Executive Committee may be filled by special election held at a meeting of the members of the organization, no less than 30 days and no more than 45 days from the date of the vacancy, in conformity with Articles XV and XVI hereof. Until such vacancy is filled, the Chairperson may appoint in his or her discretion a member to fill the vacancy on a temporary basis. Any Officer or Member-at-Large elected at a special election shall serve only until the next regular election.

#### **Article XVIII: Notice**

Notice of (i) annual meetings, (ii) meetings at which elections and removals from office will be held and (iii) meetings to amend these Bylaws shall be sent to members at least 30 days before the meeting. Notice of other meetings of members (with no less than 14 days written notice) and of the Executive Committee (with reasonable notice under the circumstances) shall be given by such method as the Chairperson shall from time to time reasonably prescribe.

#### **Article XIX: Meetings**

19.1 An annual meeting of members shall be held no later than March 31 of each year and shall act upon the following: (i) approval of the accounts and the report of the Chairperson and the Treasurer for the preceding calendar year, (ii) in election years, the election of the Officers and Members-at-Large of the Executive Committee, and (iii) such other business as the Chairperson shall deem appropriate.

19.2 Other meetings of the membership may be held from time to time upon call by (i) the Chairperson, (ii) one-third of the Executive Committee or (iii) 10% of the membership who require the holding of a meeting.

19.3 All meetings of the membership, the Executive Committee, the Standing Committees and ad hoc committees (if any) shall be open to the membership and conducted in accordance with these Bylaws (including the provisions on notice).

19.4 Meetings of Democrats Abroad \_\_\_\_\_ may be held in person, by telephone, videoconference, or such electronic means as the Executive Committee may from time to time approve by a 3/4 ths majority.

19.5 For the purposes hereof, a quorum shall be determined as follows. (i) for meetings of the membership, \_\_\_\_\_ [at least 25] \_\_\_\_\_; (ii) for meetings of the Executive Committee, and Standing Committee or any ad hoc committee, one-half of the members of such committee.

19.6 If the Chairperson fails to call a meeting in a timely manner for whatever reason, the Secretary or another Officer shall call the meeting.

19.7 The agenda of a meeting of the membership shall include any item of business submitted in writing to the Chairperson in advance by ten percent (10%) of the membership. The agenda of any meeting of the Executive Committee or of a subcommittee shall include any item of business submitted in writing to the Chairperson in advance by two (2) members of the Executive Committee or of the subcommittee, as the case may be.

19.8 All meetings shall be conducted in accordance with the latest edition of Roberts Rules of Order.

#### **Article XX: Rules Applicable to the Committee**

The functioning of the Committee shall be governed by (i) these Bylaws and such rules as the Executive Committee may from time to time adopt and (ii) the Bylaws of Democrats Abroad and the Charter and Bylaws of the Democratic Party of the United States and such rules and regulations as



Democrats Abroad and/or the Democratic Party of the United States shall adopt from time to time. In the event of a conflict between (A) these Bylaws and the rules referred to in sub-clause (i) of the previous sentence and (B) the documents, rules and regulations referred to in sub-clause (ii) of the previous sentence, the documents, rules and regulations of such sub-clause (ii) shall prevail.

## Appendix C1: Campaign Finance Limits

This chart lists contribution limits as a reference for members of Democrats Abroad regarding their private activities. For contributions from Country Committees to federal candidates, please see Section 1.4: Playing by the Rules. In short: Country Committees can't contribute to candidates.

The Federal Election Commission revised contribution limits which have been indexed for inflation and are effective for the 2011-2012 elections for President, U.S. Senate, and U.S. House of Representatives. The following table lists the contribution limits for 2011-2012. For more details, be sure to consult the International Counsel.

	To each candidate or candidate committee per election	To national party committee per calendar year	To state, district & local party committee per calendar year	To any other political committee per calendar year	Special Limits
Individual may contribute	\$2,500*	\$30,800*	\$10,000 (limit)	\$5,000	\$117,000* overall biennial limit: \$46,200* to all candidates \$70,800* to all PACs and parties
National Party Committee may contribute	\$5,000	No limit	No limit	\$5,000	\$43,100* to Senate candidate per campaign
State, District & Local Party Committee may contribute	\$5,000 (combined limit)	No limit	No limit	\$5,000 (combined limit)	No limit
PAC (multicandidate) may contribute	\$5,000	\$15,000	\$5,000 (limit)	\$5,000	No limit
PAC (not multicandidate) may contribute	\$2,500*	\$30,800*	\$10,000 (limit)	\$5,000	No limit
Candidate Committee may contribute	\$2,000	No limit	No limit	\$5,000	No limit

\* These contribution limits are increased for inflation in odd-numbered years.

## Appendix C2: Fundraising, The Basics

### Fundraising is part art and part science

The science part includes, record keeping, databases, goal setting, working with budgets, and all kinds of left-brain activity.

The art is in the cheerleading, storytelling, and persuading that it takes to make a compelling case to contribute to the DPCA and to your local Country Committee.

The basics are important. You need to know the story behind the story to get potential donors, whether grassroots activists or high rollers, to commit their pounds, euros, yen, or dollars to your goal. Know your history and make a case for the future. Who are you raising money for? All fundraisers for local Country Committees need to know about DA, who we are, where this group came from, and where we want to go in the future.

For example, if you are raising funds for get out the vote efforts, it is essential to be able to tell your potential donors how many voters we helped register in the last election cycle, how many more we are targeting in the next cycle, and how their donations will help us get there. You can read great history and talking points in the “Ask” piece, originally by Michael Lange, in the next appendix.

### Basic steps

1. Identify potential donors
2. Target your donors based on closeness to our cause and prosperity and ability to give.
3. Target grassroots donors based on action items that can be accomplished with smaller sums donated
4. Decide how you are going to raise the money: face to face meetings? Events? E-mail or direct mail campaigns? Some combination of all of these? Make your plan.

### Remember these points!

- If you don't ask, you won't receive.
- Always ask for a specific amount; don't be ambiguous.
- Set a deadline and make it urgent.
- Follow up; keep precise records. Records on the donor, contact info, when they last gave, and how much.
- Make sure it's legal. Some types of fundraising activities may be regulated by local laws. Make sure that what you are planning is legal and does not require a license or approval.
- And **always** say thank you ...in fact try to say thank you more than once.

### Be prepared!

Organize a fundraising kit; keep it handy and ready whenever you go to Democrats Abroad events or other events where you may meet potential donors and new members. Make sure you have a card with contact information, donation forms, web addresses, and anything else that will make it easy to get information to and from your potential donor.

### About Events

Events are a common way to raise funds, but often not the best way. They can be expensive and time consuming. Sometimes however, they are the only way to raise money, and they do make for good personal connections.



**Here are some points to make the most effective fundraising use of your event:**

- Find a host who can provide a venue and/or underwrite the basic costs of the event
- Select a date carefully and make sure it does not conflict with other major holidays or events that will take away from your attendance
- Set a ticket price or entry price, make it appropriate to your audience and if possible offer a tiered system. For example a pre-cocktail event with a visiting political celebrity can be a limited affair with a higher price than the general large audience speech that comes after.
- Choose a host committee and make each member responsible for getting a certain number of attendees
- When possible use electronic invitations to cut down on postage and time lag.
- Get volunteers to make RSVP calls and send out reminders one week before the event
- Send another reminder 2 days before the event
- Send follow up thank-yous to all attendees
- Make sure you create situations where the attendees will have other chances to give in addition to the ticket price. Raffles, personal requests, auctions can all help.
- Have a sign-in sheet at every event to get contact information for further follow up and solicitation

*A Rule of Thumb: "Events should not cost more than 10% of the money raised."*

**A case study: Spring Brunch Fundraiser with visiting speaker**

*Planning Stage*

- First step, found a restaurant where one of our members works as a general manager. This made it possible to receive a substantial reduction in cost, keeping us under the 10% cost vs. money raised ratio
- Planned the event two months in advance. Confirmed dates with speaker and with local holiday calendar
- Set a goal of \$2,000.00 to raise at this particular event
- Set the ticket price to determine how many attendees would be needed to reach that goal
- Designed invitations and sent out e-invitations and some mailed invitations one month before the event; invitations included attractive info on menu as well as plan for the event
- Decided to add an auction or raffle to the event and sent out separate emails requesting donations for the auction/raffle
- Asked all members of event committee to try to get a minimum of five RSVPs.
- Gave everyone sample text to use in emails and personal requests
- Sent out follow up invites two weeks before the event and reminders five days before
- Got five volunteers to handle check in, money, and logistics for the event. Met with all volunteers to make sure rolls and responsibilities were clear
- Made a checklist of all items needed for the day including even small things like tape, scissors, pens etc.
- Made sure we did a "run-sheet" of what would happen at each time period and had one volunteer in charge of making sure we kept to our schedule

*On event day*

- Used a clear, organized check-in process
- Got information from everyone who attended
- Set a display table of auction/raffle items
- Fed the guests before the speeches—to make them more comfortable
- Kept good control on the number of items to be auctioned or raffled and made sure to keep the time moving smoothly
- Had a nice good-bye time with thank-yous and gave people time to mingle before leaving.

*After the event*

- Followed up with thank-yous to guests, donors, and volunteers.
- Reported money raised promptly after the event and publicly thanked all who attended and helped
- Asked for feedback on what to do differently or better in the future.

## Some Event Ideas

- **Benefit/Auction:** A benefit is a great way to involve many of your members. Include music, an auction, food, and door prizes.
- **Dinner:** A dinner is another way to involve more members and the wider community in supporting your work. Arrange for a guest speaker, slide show, or some other form of after-dinner presentation.
- **Yard Sale:** Hold a yard sale. Get people to donate unneeded furniture, appliances, books, etc.
- **Service Auction:** A service auction is also a great way to involve the entire community in your fundraising efforts. People volunteer their services, such as cooking a gourmet dinner for two, cleaning a house, or four hours of babysitting. Then you auction those services off.
- **Raffle or Prize Draw:** A variation on the service auction. Request local people/businesses/groups to give services or goods for a raffle. Make raffle tickets (being sure to have matching numbers on two sides of a ticket, with name, phone number, and address on the side of the ticket you keep) and have many people sell tickets, explaining about the work of Democrats Abroad. (Raffles are prohibited or regulated in some countries; check with your local Counsel.)
- **Alternative Holiday Market:** Arrange a place and time for local artists and craftspeople to gather to sell their goods, asking each to contribute \$25 to \$40 for a table space as well as an item of their work for an auction or raffle.
- **A-thons** (bowl/bicycle/ski/dance/rock . . .): There are as many ways to create a-thons as there are human activities! Your Country Committee can create an event, such as a bike-a-thon, and have participants seek pledges for contributions by asking for a specified amount of money for per mile.
- **Concert/Dance:** Ask local American performers to donate an evening's performance as an event for your group. Ask for a donation/admission at the door. Take time at intermission to introduce Democrats Abroad and your Country Committee, show slides, make a pitch for another donation to support the work.
- **Bake Sales:** Not to be forgotten—the bake sale! Alternatives on the bake sale theme may include a Dessert Auction, Cake Walk, or Dessert Potluck.

## **ADDITIONAL RESOURCES**

These are some of the best of the thousands of books on fundraising out there.

*How to Produce Fabulous Fundraising Events: Reap Remarkable Returns with Minimal Effort* by Betty Stallings, Donna McMillion

*25 Fundraising Secrets* by Joe Garecht, Brent Barksdale

*How to Write Successful Fundraising Letters* by Mal Warwick

*Successful Fundraising: A Complete Handbook for Volunteers and Professionals* by Joan Flanagan

*Fundraising for Social Change* by Kim Klein

## **Appendix C3: Fundraising, The Ask**

Michael Lange says: "Many have asked me which talking points I use when discussing the opportunity for an American to become a Sustaining Donor of Democrats Abroad."

The following are some of the issues I raise when speaking with people. This is not an exhaustive list, nor will all work for you. It is always better to know a little about the person and try to tailor your discussion to their issues/ideas. Keep in mind that with all fundraising, the other person should do the majority of the talking, not the one asking.

Remember, never beg. It is not becoming and not what we are about.

The following points are for a person who is an American, is not a member of Democrats Abroad, but may want to become a Sustaining Donor. They are in no specific order. Please feel free to use these as you wish and if you have additional ones yourself, please include them.

One last suggestion: please try to limit your talking points to no more than three to five issues when talking to a person. Please remember this is not Major Donor work in most cases. This is a way for all people to help promote the Democratic Party's agenda (and President Obama's policies). This is about beating Republicans at the ballot box. It is not only about raising money for the good work that all of you do for our country!

Some Republicans care only about prosperity for themselves. The Democratic Party is about the American people and the American Dream for all.

### **Talking Points**

- Democrats Abroad is the official wing of the Democratic Party for all those Americans who live outside the United States. ...We have been active for almost 50 years. ...We have organizations in over 80 countries and growing. ...Think of Democrats Abroad as the state party for all Americans who live outside the U.S.
- Our primary goal is to register Americans who live outside the U.S. to vote in Federal elections for Democrats. ...
- Real results from recent elections have shown that the overseas vote will make a difference, but only if we vote in all Federal elections. Every vote makes a difference. ...Your vote will make a difference.
- How long have you been a Democrat? ...Were your Mom or your Dad Democrats?
- Our goal for 2012 is to ...re-elect the President and a Democratic Congress; register 100k voters on VFA; increase DA membership by 25k, raise \$300-500k;. ....There are more than 7 Million Americans that live outside the U.S. and this number is only growing. ...These are realistic goals. ...To achieve these goals will cost money. ...The Republicans are also spending money to register voters abroad. ...We have been more successful but we need to keep the momentum going.



- Democrats Abroad does not receive any money from the Democratic Party. ...We receive support (for example, our Executive Director) and advice in many areas. ...Like most other state parties in the U.S. we must pay our own way from our own people. ...All Democrats who live outside the U.S. are volunteers. ...In addition to contributing and being a Sustaining Donor myself, I contribute my time and money to help defeat Republicans.
- Is your partner an American? ...Would they consider being a Sustaining Donor as well? ...It would be fantastic if both of you would join. ...Yes, you can do it as a joint contribution as long as your partner is also an American or has a valid green card.
- Do you have any children who are over 18 or older that are American citizens? Would they like to support the Democrats and become a Sustaining Donor as well?
- Do you know of any other Americans who are Democrats or Independents who I could speak to about our country and supporting Democrats? ...Please let me write down their names. ...Really appreciated, thanks.
- What do you want to see Democrats accomplish in the U.S.? ... What are the roadblocks to progress in DC?
- How long have you lived outside the U.S.? ...Did you vote when you lived in the U.S.? Do you vote now that you live outside the U.S.?
- Are Supreme Court decisions important to you? ...Do decisions like *Citizens United* concern you?
- What is the most important reason that you are a Democrat? ...
- Becoming a Sustaining Donor helps in many important ways. ...First you help beat Republicans at the ballot box. ...Second you help register voters outside the U.S. to vote for Democrats. Third your money is used to directly help us to find and communicate to Americans who live outside the U.S., it is hard work. We are building and improving our own grass roots organization just as all other state parties are. All our members are volunteers and are not paid. ...We have only one paid person, our Executive Director who sits in the DNC in Washington D.C. ...The rest of us do this for free because it is that important to us and it matters because we do make a difference.
- Who is your Senator and Representative in Washington DC? ...You are not sure? ...Tell me where you vote and I will get back to you and let you know who they are?
- Where you ever involved with your state party back home? ...Did you contribute to them at all?
- You would like to help, but do not have time. ...There is a perfect solution that we can do right now. ...Please become a Sustaining Donor. ...This allows you your time but at the same time you will be able help beat Republicans and help Democrats who live abroad to make a difference in Federal Elections.
- You do not want to give because it is not an election year? ...If you were a Republican would you feel the same way? Have you seen what they are doing in Congress? To the economy? The Supreme Court is next. ...Non-election years do not seem to stop them.
- Why do I do this? ...Why do I try to raise funds for Democrats Abroad? ...Because I can pull out my credit card and know that I have made a difference. It really is that easy. To me a Sustaining Donor membership in Democrats Abroad is an investment in the future of my family and my country and most importantly, because as a Democrat, I want to. I want and choose to help. If people who are as dedicated as me won't make a difference for our country, how could I even consider asking you to join me?
- Will Democrats win again? ...Absolutely.
- Every dollar you contribute as a Sustaining Donor puts Democrats one dollar closer to victory!
- Please join me in becoming a Sustaining Donor. ...Let's get your credit card out. ...How would you like to help?
- How much can I put you down for over the next 12 months? ...Lump sums would be more helpful than spreading it out over 12 months, but I am happy to help in any way you wish.
- Thank you very much for the \$100. ...It would be great if you could make that .... . \$120. ...That would cost you about 32 cents per day. ...It would be greatly appreciated. Let's do \$120.

- How much would I like you to contribute as a Sustaining Donor? ...What would you like to do? You can do a little better than that. ...Let's add another XXX.
- I would love for you to give \$1200. ...Cannot do that, let's do \$492 for the year, that's about \$1.30 a day. ...That is very doable.
- Thank you. ...Today you have made a difference. ...And what you have done is important!

## Appendix C4: Event Planning Checklist

### Develop strategies for success.

- Make sure the purpose for the special event is important enough to merit the time and expense needed to properly stage, publicize and evaluate the event.
- Start planning as soon as possible.
- Develop ways to evaluate the event's success. Measurable event objectives may include attendance or the amount of money raised.

### Set program.

Choose event entertainment and/or guest speaker, who will present the speaker, and what goals you want to accomplish. Are you trying to inform, educate or entertain? Is a meal before/afterwards involved?

### Consider logistics.

Choose event location. Major areas to consider and plan for include: size of space or building used, utility/technical support needed, set-up coordination (tables and chairs, parking, signage), clean-up, emergency plans, transportation/parking, internet access, and public services such as police department.

### Possible equipment needed:

- |                             |                        |
|-----------------------------|------------------------|
| o Extra rooms/entrance area | o Maps                 |
| o Location for book signing | o Cash box/change      |
| o Microphone and speaker    | o Directional signs    |
| o Sound system              | o Flip charts/markers  |
| o Lighting                  | o Tape, staplers, pens |
| o Lectern                   | o Printed programs     |
| o Tables and chairs         | o Parking permits      |
| o Stage or platform         | o Nametags             |
| o Head table                | o Decorations/flowers  |
| o Trash cans                | o Linens for tables    |
| o Food and beverage service | o Trash bags           |
| o Water for speakers        | o Tablecloths          |

### Establish event budget.

Are there venue fees? Audio/visual fees? Does entertainment/ speaker require transportation reimbursement or honorarium?

Determine cost per person for event and lunch/dinner. Be sure to set event price so as to cover all expenses to be incurred. Is fundraising involved?

### Set event date.

Try to avoid scheduling an event that is too close to a major holiday or that conflicts with a major local event.

**Set RSVP date.**

Especially if dinner is involved. It's a good idea to set this date about one week prior to your event. Even if you are having a potluck picnic, an RSVP date will give you some idea of interest.

**Divide up event planning responsibilities and organize volunteers for each committee.**

Here is a sample list of responsibilities. For each, who will ...

- be the speaker's contact?
- send speaker DA info?
- arrange speaker accommodations and transportation?
- handle event location reservations (or asking host)?
- arrange for audio/visual equipment if appropriate?
- handle dinner reservations (if any)?
- take RSVPs and make registration list?
- take event fee (at door) and keep track with the Treasurer?
- be responsible for paying venue/other fees?
- coordinate with bookstore (if necessary)?
- coordinate voter registration?
- publicity?
- invitations?
- organize refreshments (if any)?
- bring water for speaker?
- name tags (if any)?
- room set-up?
- room clean-up?
- activity evaluation?

**DAY OF THE EVENT**

Arrive early to make sure that the room is arranged properly and to acquaint yourself with the facilities.

**FOLLOWING THE EVENT**

Evaluate the success of your program.

- Did the event fulfill its goals and objectives? Why or why not?
- Send thank you notes to those who assisted and make sure that all bills are accounted for.
- Hold an evaluation meeting to discuss things that worked and didn't work.

Finally, please share your advice with the DPCA Best Practices Committee and your Regional Vice Chair, especially if you created resources that could be included in an Event-in-a-Box for other country committees' events.

**Appendix D1: Media Guidelines**

A serious analysis of the various magazines, newspapers, television programs and radio stations you want to target is useful before you start contacting them. Your members need to have accurate, unemotional assessments of all the media entities you want to deal with.

Are they right wing, centrist or left wing? Are they interested in the facts or just a good story? How accurate have previous stories been? Who owns them: a family? a trade union? a mega corporation? All these things can influence the tone of the newspaper or TV station.

Do you want to deal with English-speaking outlets only to get new members and voters or do you also want to contact the full range of media to give an American point of view rather than the prevailing one?

If you are holding an event, send out a clear press release a week or two ahead of time and follow it up with another closer to the date. It is important to find out who the producers or editors are of the various programs or newspapers/magazines you want to contact. A phone call (or two or three) is necessary. Sending a press release alone may not always work.



Make sure you have one contact person listed on all press releases. The person who does this has been designated by the country committee as the Media Contact, a title that has been agreed upon for the person dealing with press at the country (or chapter) level. (If no one is appointed, the country chair may be the person used as the contact.)

Remember, if it's a big news day, you may get squeezed out if it isn't one of the big stories. Some organizations are more forthcoming about their internal workings than others. When you have some names and numbers, keep a list but remember people move around very quickly in this business and the person you spoke to last week may not be the same one you speak to next week.

It is not the people in front of the camera who normally have any say about who appears or what is said on the program.

When you send out a press release, make sure the information is accurate and that you have the standard blurb about Democrats Abroad so they know that we are the overseas arm of the Democratic Party.

There is written information available on media contacts, on party protocols (e.g. we do not comment on the internal politics of the foreign countries in which we live) and on writing a press release that may be helpful to you.

The DPCA International Press Secretary is there to help all our country committees, so do not hesitate to get in touch if you want more information.

## **Appendix D2: Your Country Committee's Media Contact**

Each Country Committee should have Media Contact whom the Country Committee's Chair or Executive Committee appoints. "Country Media Contact" is a convenient and accurate title for your appointee. A consistent title in each country makes for easy identification of functionality and simplifies the task for media to contact more than one country committee at a time. A Media Contact at the Chapter level should be called "Chapter Media Contact," and each Regional Vice Chair may appoint a "Regional Media Contact."

Please consider the following factors in your choice of Media Contact, because the level and sophistication of media interest varies widely from place to place. Still, in most cases, it's best to assume that local media interest in American politics will increase over time.

Do mid-term elections generate interest? Does your local media's interest start early in electoral campaigns?

How does the local media respond to unexpected events, such as Hurricane Katrina, President Obama's announcement regarding gay marriage, or Scooter Libby's indictment?

Are you sought out by your media for these events, or do you need to drum up interest?

The Media Contact often works behind the scenes and competence is the most important qualification. He or she works to set up interviews, not necessarily to give them. Someone who wants to be publicly recognized should play a different role in the organization.

Knowledge of how the media works is very useful but not totally necessary. Instead, look for a person who is well-organized, gracious, detail-oriented and consistently responsible. A Media Contact should not be awed by the media, and willing to say no to local celebrities. It is crucial that a Media Contact understands Democrats Abroad as a worldwide organization: who we are and what we do.

Fortunately, your Media Contact will not be alone. Regional Media Contacts and Regional Vice-Chairs are your first source of support, and the International Media Contact may also be available. Democrats Abroad also has several experts who provide online training and workshops at regional and international meetings.





### Appendix D3: Sample Legal Ad

from 2007 DPCA Handbook

Only Democrats Abroad International may pay for public communications including newspapers, television, radio, Internet, direct mail of over 500 pieces per year and phone banks making over 500 similar calls per year that promote, support, attack or oppose a Federal candidate or political party.

Country committees may **not** purchase public political advertising that mentions a Federal candidate or promotes the Democratic Party. Exceptions would be advertising directed exclusively at the recruitment of new members or promoting non-partisan voter registration.

In all cases, **ads must be pre-approved** by the International Counsel of Democrats Abroad.

Here is a sample voter registration ad.

**American?**  
**Vote!**  
We can help.

September is the last month in which many states will accept registrations for the General Election on 2 November.

**Voter registration assistance for U.S. citizens in Amsterdam is available:**  
Every Thursday, 6:00pm - 8:00pm  
The American Book Center  
Kalverstraat 185

We're also present in Den Haag, Rotterdam, Utrecht, Haarlem and more. Check our website for the latest dates and venues.

*voter assistance courtesy of*  
**DEMOCRATS ABROAD**  
Democrats Abroad offers assistance to all U.S. voters on a non-partisan basis.  
vote@democratsabroad.nl  
www.democratsabroad.nl  
Phone: 070 517 9003

## Appendix D4: Writing a Press Release

### What is it?

A press release is a way of getting the attention of the media (or other interested parties). It used to be the main point of contact with the press, but that is changing. However, a press release still has its uses.

It should be brief and to the point. *Don't write a Russian novel!!!* Normally, it shouldn't be more than one page long.

### Why send it?

1. You want people to come to an event (but not especially the press)  
(*This may be tricky for us because when we hold events, we can only accept money from American citizens.*)
2. You want the press to cover an event
3. You want them to be aware of a new situation or of new information
4. It clarifies or reinforces information the media already has
5. You want them to know about something that has just happened.

### Structure

#### Logo

The Democrats Abroad logo should be at the top.

Next should be the time sensitive information. It will either say "For Immediate Release" or "Embargoed Until *the date*." Be aware that the media doesn't always respect the embargo so be careful about sending out information that can't immediately be broadcast.

#### Title

Remember that media entities receive many, many press releases everyday. It is important to have an eye-catching title. This doesn't mean it has to be sensational but it should be clear and punchy.

#### First paragraph

The beginning of the press release should state all the main facts. (*This may be all the recipient reads before deciding to keep it or throw it away.*) The classic who/what/where/when is still a good basic rule. Sometimes a story won't require all these categories but it helps to use them as a guide. Tempt them with the most interesting bits of the story.

#### Second paragraph

This is a chance to give a bit more information and add "why" to the story.

#### Third paragraph

This may be a quote from someone in your committee or a DPCA official.

You may only need two paragraphs. Don't fill up the page if you don't have to. If the media is interested, they will contact you for more information. Congratulations! Your press release has done its job!

Remember – if the release is about a country event, the country identity has to be part of the information. For example, if Democrats Abroad Antarctica is having an event, they must put DA-Ant next to their officers and their country information. Just putting "Democrats Abroad" means the event and/or the people are international officers. The exception is the logo at the top, which should just be Democrats Abroad or your Country Committee's logo.

Make sure any relevant info such as time, date and location is included. Make sure to include a contact name (with title – the Media Contact? the Chair of the committee?), a telephone number and



an e-mail address. At the bottom should be a brief bit of information about us. *Never assume the media knows who we are even if they say they do.*

A suggested statement: "Democrats Abroad has been the overseas arm of the U.S. Democratic Party for more than 40 years. It is the only official overseas arm of an American political party. It works in over 70 countries around the world to help Americans vote and to be active in the American political process."

At the very bottom, please add the website address: [www.democratsabroad.org](http://www.democratsabroad.org).



The Online Handbook has links to sample press releases for you to emulate.

## General info

Finally, press releases are normally time sensitive. Speed is more important than writing great literature. But be aware that if we send them something that is well written, they are more likely to use our text and therefore we have a better chance of getting coverage.

Check the spelling and grammar. You may want someone else to read it over. A second brain is always helpful.

If someone from the media contacts you, make sure you get their contact info for our database.

## Getting the press release out

You may have a database of contacts. If so, it is an easy job to send the press release out by e-mail. Depending on the personality of the media in your country, a back-up faxed press release may also be appropriate.

If you don't have a database, it may mean you have to have to start by telephoning TV and radio stations as well as newspapers and Internet news organizations to find out their contact information. They may have a general address for press releases or they may prefer to have it go to one or two programmes or even to a news editor.

When should it go out? The time for sending this out can vary because:

1. We have to prepare an event for a visiting VIP very quickly
2. It is going out after an event, therefore it must go out quickly
3. For TV/radio/daily newspapers: If it is an event/story where we have more notice, it is a good idea to send one out a week ahead then ring two days before, possibly sending out another press release.
4. For magazines or filming: You will have to contact them earlier. Try to keep a list of deadlines for magazines or other media that may have a longer lead-in time on stories.

Remember many programs have more than one shift of staff during the day so it doesn't hurt to send it more than once during the day if you have specific names of staff. There may also be a 'Planning Desk' address/contact.

## Appendix D5: Setting up a Media Interview

The best way of reaching Americans living outside the U.S. is by having a presence in the media. Here are some guidelines to help maximize our opportunities.

### I. The Media Call Us

#### ***Setting up the interview***

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1. If you are not the Media Contact for your committee, please direct the request to your Media Contact. That should be done promptly.
2. Find out *precisely* with which media entity you are dealing. For example, if they say “BBC,” ask what show and, if you are not familiar with the program, whether it is TV or radio or viral.
3. Get the name, phone number(s), and e-mail address(es) of the person who contacted you. Bear in mind that the phone number used for planning a radio or TV show may be different from the one used at the time of the program.
4. Find out as much info as you can about the show and what they want.
  - a. What is the topic?
  - b. Is it a one-on-one or will there be other guests? Who will be doing the interview?
  - c. Where will the interview be held?
  - d. How long will it be?
  - e. What type of set—behind a desk or on a sofa? What color is the set?
5. If there is time, confirm information in an email message that includes contact information for the speaker from your country committee who will be the guest on the show. Include the Democrats Abroad Blurb (included in this handbook) and a phonetic pronunciation of your speaker’s name (if needed) and how he or she should be credited. Remember the Chair of a Country Committee should be credited as John Smith, Chair, Democrats Abroad *YourCountry*. International officers should be described as “International *Name of Office*, Democrats Abroad.”
6. Transport arrangements should be made by the media organization, not by you or the speaker. Your Media Contact should be on duty before, during and after the interview in case there is a problem (for example the car collecting our speaker doesn’t show up).

#### ***Finding a speaker***

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1. The people most likely to be our main speakers are the Chair and Vice-Chair of the Country Committees. International officers and DNC members based in your country may also be the people you rely on. They should be current with talking points and policy. You may find, however, that one person is better at a certain type of interview than another (i.e. “the right wine for the right meal”).
2. The Democrats Abroad representative should:
  - a. know who we are and how we relate to the rest of the party
  - b. How to keep cool under fire and still make good points
  - c. Keep answers short; people who keep talking at all costs do not give a good impression
  - d. Know that you can only divert so far from the question asked

#### ***Briefing our representative***

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1. Remember we don’t comment on the politics of the countries in which we live (the Dutch committee came up with a good riposte to such questions: “As guest residents, we don’t feel it is our place to comment on the internal politics of *name of the country*.”)
2. While we may be asked to comment on a certain topic, the interview may cover others, so be prepared for anything!

3. The Media Contact should pass on to our representative any info on the other guests and the presenter.

### ***Appearance***

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1. Don't let your clothes distract from our message. Navy and grey are usually the best bet. Avoid checks and stripes. Dangly earrings, 'noisy' jewellery (e.g., clunky bracelets) or sparkly things will distract. Skirts should be longer, necklines higher. Crossing your legs in a short skirt can turn an interview into an anatomy lesson!
2. Men should make sure their socks are long enough so they keep hairy legs covered up if they cross their legs.
3. Watch your posture.
4. Fewer and fewer programs offer make up, but take advantage if it is offered. Shiny = sweaty = nervous = untrustworthy.

### ***Interviews with print journalists***

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1. Check that the person who is contacting you is who they say they are. We had some people present bogus credentials during the '04 election.
2. Before you start, if you want a few minutes to catch your breath, ask them to phone back. Do ask what their deadline is. They will appreciate that you are sensitive to their work pressures.
3. If the interview is with a newspaper, you may want to bring your own tape recorder to make a copy of what was said. (Doing so may underscore to the journalist the importance of an accurate report!)
4. If they ask to speak to other members of Democrats Abroad, send the request back to the Media Contact.

## **II. We Contact Them**

There are times when we want to let the press know about an event. This is when a press release is especially important. (See "How to Write a Press Release" in this handbook.)

Don't confuse Press Releases with Talking Points; the latter are internal information used to brief our speakers.

Remember that Press Releases should be treated like gold dust... only sent out when absolutely necessary. Sending too many dilutes their usefulness.

### ***Post Mortem***

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Whatever the contact, it is good to assess how an interview or event went. How could it be improved? Did we learn anything about the opposition or a media entity?

If there was a problem with the interview, let the Media Contact deal with it.

The International Press Secretary is always available to help. If you are having a difficult time with a member of the press or if you want more info, please feel free to contact me.



## Appendix D6: The “Blurb”

by Sharon Manitta, from the 2007 Handbook

The “blurb” is the official description of who we are and what we do. It should be included as the final paragraph of any press release and appended to other materials as required.

***Please, don't forget the blurb!***

Democrats Abroad is the official overseas arm of the Democratic Party of the United States. At work in more than 75 countries around the world, Democrats Abroad helps overseas Americans to register and vote in U.S. federal elections and helps keep members connected and informed. Founded in 1964, Democrats Abroad holds eight positions on the Democratic National Committee and sends a voting delegation to the quadrennial Democratic National Convention to select our presidential candidate.

For further information, please contact our Executive Director  
Vincent Fry, ed @democratsabroad.org

## Appendix E1: Democrats Abroad Country Committee Election Procedures

This document is designed to provide Democrats Abroad (DA) Country Committees with a set of procedures to assist in organizing and conducting successful elections for DA Country Committee Officers. The following procedures are minimum standards based on the election practices of the Democratic Party Committee Abroad (DPCA or simply 'Democrats Abroad') and the Democratic Party of the United States (Democratic National Committee or DNC). Specific terms in Country Committee bylaws may vary from these minimum standards to fit local needs. However, where a Country Committee's bylaws are in substantive conflict with these procedures, the committee should consider amendment of its bylaws to reflect these standards.

### 1. General

Country elections should be held every two years in odd numbered years, preferably within the first quarter (i.e., by March 31st) and not later than the second quarter (i.e., by June 30th) in order to align with DPCA and DNC election schedules.

Committees which have gained full committee status and held formation elections in an even numbered year should hold another election again in the next odd numbered year (no later than the second quarter) to move committee elections into the odd year schedule.

An election meeting must be called every two years. Depending on a country committee's bylaws, this meeting can be held in conjunction with an annual general meeting. Minutes of the election meeting must be reported to the International Secretary, along with copy to the Regional Vice Chair, and together with complete contact information for elected officers. This must occur no later than 15 days after the election. A copy of the committee's current bylaws should also be forwarded by January 31<sup>st</sup> of each year, or subsequent to any amendments. Officers may not serve more than two consecutive terms in the same office. (See Section 5.2, DPCA Charter.)

An officer who was elected mid-term and has served for over a year and a day is deemed to have served a full term.

A meeting is defined as an official gathering of members in one room or area to transact business. The quorum requirements in a country's bylaws must be met. Members may be present in person, by proxy or by video or teleconference. (see Chapter IV, Section 8 of Robert's Rules of Order 10<sup>th</sup> Edition and Section D of this document: Ballots and Proxies)

Elections should be conducted by an Election or Nominations Committee specifically appointed by the Country Chair in consultation with the Country Committee Executive Committee.

### 2. Elections Committee

a. The Elections Committee (in some Country Committees these are termed "Nominations Committees") should be composed of at least three members. They must all be members of the country committee. Their appointment by the Chair or Executive Committee should take place no less than 45 days from the date set for the election meeting and are to be announced in the election notice not less than 30 days prior to the election.

b. No member of the Elections Committee may be a candidate for office.

c. All actions of the Elections Committee shall be taken by a majority vote of the committee members.

d. An appointed Elections Committee's ability to carry out its duties shall not be delayed or hindered in any substantive manner by the Country Committee Chair or ExCom.

e. The Election Committee (one member) must be granted limited administrative access to the country membership database for membership notification and for verification of membership status regarding voting. This access shall be communicated by the Country Chair to the responsible IT database volunteer and the appropriate Confidentiality Agreement submitted. Any problems in securing such access for the Elections Committee should be brought to the immediate attention of the Regional Vice Chair whose responsibility it will be to assure that



access is obtained. If access cannot be granted to an Elections Committee member for whatever reason, an IT Team member will be assigned by the Regional Vice Chair to send all election notices. Communications through the IT Team volunteer shall originate solely from the Elections Committee.

### 3. Duties of the Elections Committee

- a. Give notice of the election meeting and keep the minutes of that meeting.
- b. Accept written nominations.
- c. Verify candidate eligibility.
- d. Ensure that all candidates are informed of nominations, seconds, elections calendar, and the process for posting candidate statements
- e. In cases where no nominees has come forward for an open Executive Committee position, Election Committee members may reach out to solicit candidates and nominations from the general country membership.
- f. Issue a list of candidates for office.
- g. Write and distribute a ballot.
- h. Ensure that the election meeting is run by a member of the Elections Committee.
- i. Be the recipient of any electronic ballots, transport these to the election meeting and be responsible for opening these.
- j. Be the recipient of all proxies, verify the validity and proper execution of each proxy and confirm the membership status of all proxy givers.
- k. Collect ballots and count the votes.
- l. Verify the final election tally.
- m. Report the results to the gathered membership immediately and again via a DA country webpage by posting to all committee members, to the International Chair, the appropriate Regional Vice Chair and the International Secretary.
- n. Hear and adjudicate any election disputes.
- o. Monitor the election to ensure a public, open and fair process.

### 4. Recusal of Candidates from Election-Related Matters

- a. The use of local independent Elections Committees is an essential part of maintaining the integrity of and avoiding any appearance of impropriety in our Country Committee elections. It is therefore essential that all candidates for office, especially incumbent holders of officer or At-Large positions, be recused from all aspects of election administration. A significant number of problems, misunderstandings and disputes can be tied to even well-meaning attempts by Country Committee leadership to assist with election-related matters.
- b. Election-related communications should only be performed by and released in the name of the Elections Committee. This relates to use of the [www.democratsabroad.org](http://www.democratsabroad.org) website, membership-mailing resources, as well as any Internet or social-media sites used by a Country Committee to reach its members.
- c. Moderation of social media attached to the committee (country Facebook pages, as an example) must be overseen by the Election Committee. Fair posting and moderating practices must prevail.
- d. Matters pertaining to the collection, handling and counting of ballots are especially sensitive and are to be left exclusively to the Elections Committees.

### 5. Rules Governing the Election

- a. Eligible Voters
  - (1) Voters must be registered members of Democrats Abroad in the Country Committee or chapter for which elections are being held, prior to the election. Registration deadlines may vary depending on the type of election and balloting:
    - (a) for ballots submitted via in-person voting at the meeting: the day before the election meeting; or if the committee chooses same day registration, no less than 1 hour before the scheduled meeting time;
    - (b) for ballots submitted by proxy or mail: no less than 14 days prior to the election meeting.

- (2) Many relevant bylaws require that membership in a particular Country Committee or local chapter automatically ceases upon a Democrats Abroad member's no longer residing within the relevant country. The career, family and other needs of many Democrats Abroad members requires that they may travel, have temporary work assignments in another country, or have more than one home. However for purposes of voter validity, the totality of the circumstances should be evaluated in determining a primary residence. Where a question of voter residency arises, a determination should include a majority affirmative of the following:
  - (a) Does the voter maintain a bona-fide residential home within the relevant country? (e.g., not merely storage of items but an actual residential home address)
  - (b) Does the voter have an office or primary place of work within the relevant country?
  - (c) Does the voter have a specific personal or work telephone landline within the relevant country at which he or she can be reached?
  - (d) Does the voter have a specific personal or work mobile phone within the relevant country at which he or she can be reached?
  - (e) Did the voter spend at least a plurality of days within the past year within the relevant country? (i.e., did they at least spend more time there than in any other country?)
- b. Notification of Election Meeting
  - (1) No less than 30 days prior to the election meeting, the Election Committee will notify the membership of the location and time of the meeting and a listing of positions to be elected by email and other means necessary to provide reasonable notification. The notice should include an explanation of the nominations process, methods for voting, relevant deadlines and dates. In addition to any other methods of notification, the Election Meeting Announcement must be sent to all country committee members through the Country Committee database through the Democrats Abroad website and be posted on the [www.democratsabroad.org](http://www.democratsabroad.org) Country Committee webpage.
  - (2) Voting may take place in person (by voice, show of hands or written ballot), by written proxy, by absentee ballot or any combination thereof.
- c. Nominations
  - (1) The country officers to be elected are: Chair, Vice Chair, Secretary, Treasurer and Legal Counsel. A country committee's bylaws may contain other offices such as Chapter Chairs, country boards, Members At-Large, etc.
  - (2) The Chair and Vice Chair must be of opposite gender. This is a Democratic Party rule and cannot be changed.
  - (3) Nominations for an office shall be made in writing by a member and seconded by another member, either in the same or separate writings sent to the Elections Committee, or from the floor of the election meeting in the case of fully in-person elections. The Elections Committee may also make nominations directly.
  - (4) Each nominee shall confirm his or her willingness to stand and serve as soon as possible after receiving a nomination.
  - (5) Nominations should be received no later than 17 days before the election. Floor nominations are allowed in fully in-person elections conducted via meeting without ballots cast via absentee or email balloting.
  - (6) If any office does not have a candidate, nominations may be made from the floor at the election meeting. However, if the committee opts for voting by mail (i.e., absentee voting) and all offices have a candidate, floor nominations are not allowed, as those voting absentee will not have the same opportunity to vote for candidates nominated from the floor and voting will already be in process.

- (7) Should a country committee wish to accept nominations from the floor for all offices (i.e., including those with nominees in place prior to the election meeting), voting can only take place in person or by proxy, noting a member may only carry two proxies. (See Section 3.9 Proxy, DPCA Charter.) The carrying of more than two proxies is not allowed under the DPCA Charter. If country bylaws contain a more liberal proxy interpretation, these should be revised to conform to DPCA policy.
  - (8) All candidates for office shall be permitted to post a statement on the Country Committee's page of the DA website ([www.democratsabroad.org](http://www.democratsabroad.org)).
- d. *Ballots and Proxies*
- (1) If the committee opts for voting by absentee ballot, the written ballot shall be sent by email to all members not later than 14 days prior to the election meeting. Members without email shall receive a ballot by post or hand delivery.
  - (2) The ballot should also be available for download from the country committee's page on the DA website.
  - (3) The ballot shall clearly set forth the postal address and/or email address for the return of the ballot and the date, time and location of the election meeting.
  - (4) All ballots must be signed by the voting member. This is a Democratic Party rule requiring open ballots and cannot be changed. Any voting method which does not involve a physically signed ballot must be brought to the Regional Vice Chair and International Counsel for prior approval.
  - (5) Any ballot returned by email attachment or scanned attachment must be sent from the member's registered email address and must be signed. For purposes of a ballot being deemed "signed", a voter's email signature in a typed form sufficient to identify themselves shall serve as a personal signature.
  - (6) Any ballot returned by post, hand delivery or email attachment must be received no later than the day prior to the elections meeting. Otherwise, voting must take place in person or by written proxy at the election meeting.
  - (7) A proxy shall be in writing, shall name the member to whom the proxy is given and shall be limited to voting in the election. The proxy may not be transferred by the proxy holder.
  - (8) To encourage active participation, a member shall not hold more than two proxies. This rule refers to standards set and described in the DPCA Charter and supersedes any varying number of proxies allowed in Country Committee bylaws. Country committee bylaws may also opt to disallow the use of proxy voting in elections.
  - (9) A proxy may be revoked at any time prior to the call to order of the election meeting on determination of the Election Committee or by the issuing member.
- e. *Vote Counting*
- (1) All eligible ballots shall be counted at the elections meeting by the Elections Committee members or its appointed tellers present at the meeting. Such verifications shall include but are not limited to:
    - (a) late registrants, which shall not be counted;
    - (b) late-submitted ballots, which shall not be counted;
    - (c) unsigned ballots, which shall not be counted;
    - (d) blank or partially blank ballots, which shall not be counted for the purposes of any position for which the ballot is blank but shall be counted for any positions for which a candidate is selected;
    - (e) ballots indicating a vote for multiple candidates where only one may be voted for shall not be counted for the purpose of that position.
    - (f) ballots submitting a non-member as a write-in candidate or submitting a write-in candidate for a position where, under the country committee bylaws a write-in candidate would not be permitted.

- (2) The candidate with the most votes shall be considered elected into the position.
  - (3) If there is a tie for an elected position, the Elections Committee shall call an immediate, on-the-spot runoff election with the participation of those present at the meeting. Proxies may again be voted if they are general to the election and not limited to a specific candidate who is not a candidate in the run-off round.
  - (4) The results of the election shall be announced at the election meeting, sent by email to the membership and posted on the website, unless a challenge has arisen.
- f. *Election Questions and Challenges*
- (1) To ensure prompt resolution of election-related concerns, Country Committee members (whether voters or candidates) should raise their questions regarding election matters to the Elections Committee at the time that such issues first arise or are discovered. Challenges to the Election Committee must be made within 15 days of the election meeting.
  - (2) The Elections Committee shall attempt to address questions and to hear and adjudicate challenges on the local level. The Elections Committee may consult with the International Counsel about the legal requirements and possible solutions to issues raised. The Election Committee (with guidance from the International Counsel) is solely responsible for resolution of such challenges. Such matters are not to be adjudicated by or interfered with by the country Executive Committee or any of its sitting or newly elected officers.
  - (3) Challenges to an election result or process may be filed by any eligible voter, should be made in writing and include a statement of the legal and factual basis for the challenge. Challenges should be filed with the Elections Committee, and a copy sent to the Regional Vice Chair, International Counsel and International Chair, no later than 15 days after the adjournment of the election meeting.
  - (4) If the Elections Committee cannot resolve a challenge to an election result or process within 15 days following receipt of the challenge, such dispute documentation shall be referred through the International Counsel and Regional Vice Chair (with a copy sent to the local Elections Committee) for adjudication to the International Chair in conjunction with the International ExCom, with options including remanding the matter for handling by the local Elections Committee, submitting to the International Counsel for a determination on legal issues, dismissal of the challenge, or, if warranted, requesting that the matter be submitted to the International Chair and Executive Committee as Formal DPCA Credentials Challenge described and outlined as a formal procedure under the Rules of Procedure of the Democratic Party Committee Abroad in addressing the challenge.

This version adopted by the DPCA Executive Committee on October 13, 2009, amended on October 27, 2009, and amended on February 8, 2011.

## Appendix E2: Resolutions of the DPCA

### Overview

DPCA Resolutions are formal actions of the DPCA. Resolutions include policies for internal governance (of country committees, for example), statements of political positions, or changes to the bylaws of the organization. (See below for some examples.)

DPCA Resolutions are presented at General Meetings, typically by the Resolutions Committee, and in accordance with the Charter. They are usually treated as main motions, and the DPCA members discuss the proposed resolutions, sometimes amend them, and finally vote on whether to adopt the resolution and make it a binding commitment of the organization. Resolutions can also be rejected, or referred to committees for further study or refinement.

### Resolutions according to our Charter

3.3 (a): Any member may request the International Chair in writing, not less than thirty (30) days before the meeting, to place additional items on the agenda, and shall simultaneously furnish the text of any resolutions proposed for adoption. The International Chair shall circulate such additional items and proposed resolutions, as well as other resolutions, to the members of the DPCA not less than fifteen (15) days before the meeting. Items may be added to the agenda at the meeting by majority vote of the members present or represented.

3.3 (b): The International Chair may name a Resolutions Committee for the meeting to review any resolutions presented to the Chair as additional items for the agenda. The duty of the Resolutions Committee shall be to refine the language of proposed resolutions and obtain approval of the refined language from the person(s) / committee(s) submitting the proposed resolutions and to advise and make recommendations to the DPCA concerning the substance of the resolutions.

### Examples of Resolutions

Many resolutions are listed on the [democratsabroad.org](http://democratsabroad.org) website (at [www.democratsabroad.org/resolutions](http://www.democratsabroad.org/resolutions)), and the resolutions for each meeting usually appear in the minutes for those meetings.

An example of a resolution that affects the internal governance of the DPCA and its country committees is the Resolution on the Funding of Democrats Abroad, adopted at the March 2011 Annual Meeting in Seoul. The text is linked to the Online Handbook.



An example of a resolution that commits the DPCA to a political position is the Resolution concerning the Aftermath of Bush-Cheney, adopted at the November 2008 Meeting in Istanbul. The text is available at ([www.democratsabroad.org/node/8042](http://www.democratsabroad.org/node/8042)). Note that the RESOLVED paragraphs of the resolution call for action by specific groups. The DPCA Resolutions Committee must often ask proposers to add real actions to their proposals. The following is a good example of a RESOLVED paragraph, from the Resolution concerning Changes to Form I-130 in the Immigration Process for Family Members of US Citizens Living Abroad, adopted at the November 2011 Meeting in Arlington:

BE IT RESOLVED THAT Democrats Abroad continues to seek the retraction of the changed rule and reinstatement of the former one, by all legitimate means, including provision of information to American citizens, contacting the agencies concerned, alerting members of the House and Senate and otherwise vigorously advocating the withdrawal of the rule

The Resolution on Obama Bridges Project, adopted at the April 2009 Meeting in Washington DC, is an example of a resolution that acknowledges the contribution of particular people, or the success of a special project ([www.democratsabroad.org/node/8751](http://www.democratsabroad.org/node/8751)).

Resolutions to amend the Charter of the DPCA are handled differently than ordinary resolutions, in



part due to the requirements of Article 10 of the Charter. Please consult an International officer if you wish to introduce an amendment to the Charter.

### **Rules for Resolutions**

The deadline to submit resolutions for a general meeting of the DPCA is 15 days before the opening of the meeting, at midnight, Washington D.C. local time. Resolutions should be submitted, at minimum, to the International Chair and the Chair of the DPCA's Resolutions Committee. It is sufficient to send the text by email, as long as it is clear which member of the DPCA is proposing it. Please look to the DPCA-Leadership email list and the International Leadership Group of [democratsabroad.org](http://democratsabroad.org) for the latest guidelines from the Resolutions Committee.

### **The DPCA Resolutions Committee**

The purpose of the Resolutions Committee is to prepare resolutions, submitted by DPCA members, for consideration during general meetings. Members of the committee research the subject of each resolution, especially with respect to prior resolutions passed by the DPCA and the facts of the subject itself. Typically, a member of the committee will be assigned to work with each submitting member to develop clear wording and precise content for each resolution. The Resolutions Committee also makes recommendations regarding the resolutions, at DPCA general meetings.

If a DPCA member would like to propose an action or a change of policy, but is not sure how to compose a resolution, the Resolutions Committee can help. Members seeking help should contact the committee well before the 30-day deadline, to ensure that a resolution is considered at the next DPCA meeting.

### **Suggestions from the Resolutions Committee**

The Resolutions Committee will work on any resolution submitted in accordance with the DPCA Charter, but following these suggestions will allow the Resolutions Committee to help craft the best possible resolution.

1. To be effective, the object of a Resolution should be a call to action. In most cases this will be a call to action by the DPCA, including committing the DPCA and country committees to call on a third party (e.g. DNC, Democratic legislators, the White House, DA members). Please limit the use of "WHEREAS" paragraphs, and instead focus on the action to be taken.
2. Resolutions are different from topics for lobbying (e.g. during a DC door-knock). Resolutions passed by the DPCA can form the basis for our platform, or they can shape how the DPCA works. They are the official statements and regulations of our organization. (See Charter Section 2.1.)
3. Any DPCA member may submit a resolution for a general meeting, with no requirement to pass the resolution at a lower level. Be advised that passing a resolution in a Country Committee is a good way to prepare it for the DPCA. Fellow Democrats Abroad members will help refine the aims and the language of the resolution, and local endorsement will make it easier to gather support for the resolution among DPCA members.
4. The Resolutions Committee can continue to make changes to a proposed resolution, with the proposer's approval, in the days before the general meeting itself.

## Appendix E3: Committees and Other Groups of the DPCA

The International Executive Committee or International Chair may authorize additional Working Groups and Task Forces as needed. Please consult the Online Handbook for current information.

### Rules & Bylaws Standing Committee

The Standing Committee on Bylaws is tasked triply to:

- Be the first and expert **referral point for issues affecting bylaws** of the DPCA, including those referred by individual country committees
- Redevelop model bylaws of use to new committees in ensuring essential conformity to DPCA and DNC bylaws and compatibility with current federal regulations and laws, specifically, campaign finance and electoral
- Review the bylaws of all existing committees with reference to the points above

The committee's work will ensure that complex issues of how country committees relate to and within DPCA and how country committees relate to chapters are being cooperatively handled with clear procedures, to achieve greater commonality of purpose and practice over the long haul. The idea in constituting the committee is to combine organizational leaders and legal minds to turn problems into solutions:

- Short-term emergent problems referred to it through the Executive Committee, which includes our three regional vice-chairs
- Latent or actual structural questions by reviewing existing bylaws for compatibility with DPCA and DNC bylaws and FEC regulations
- Development by producing no later than our spring 2007 meeting a new set of DA model bylaws useful to start-up committees everywhere. The new model bylaws will then be accessible through our website and handbook.

**1. Composition of the committee:** Please see the Online Handbook for the current members.

#### **2. Scope of duties and timelines**

- Deals with emergent bylaws-related issues upon reference by Chair and/or EXCOM.
- Reviews all existing country committee bylaws (and of chapters, if any) to ensure compatibility with DPCA, DNC bylaws and FEC regulations before March 2007.
- Redrafts model bylaws for handbook and start-up groups by March 2007.

#### **3. Governance**

The International Counsel shall determine the most effective means of accomplishing the tasks, in consultation with the International Chair and Executive Director, to include any electronic, digital or telephonic means. International Counsel may alter the composition of the committee from time to time in consultation with International Chair, with due regard for regional and gender balance.

#### **4. Reporting**

Ongoing progress reports to the International Chair and Executive Director with occasional brief reports to the International Executive Committee, plus formal annual reports at spring meetings.

### Fundraising Committee

### Elections Committee

### Resolutions and Platform Committee

The purpose of the Resolutions Committee is to prepare resolutions, submitted by DPCA members, for consideration during general meetings. Members of the committee research the subject of each resolution, especially with respect to prior resolutions passed by the DPCA and the facts of the subject itself. Typically, a member of the committee will be assigned to work with each submitting member to develop clear wording and precise content for each resolution. The Resolutions Committee also makes recommendations regarding the resolutions, at DPCA general meetings





## **DPCA Representatives to the DNC**

### **Information Technology Committee**

### **Communications Committee**

Currently chaired by International Vice Chair Vicki Hansen, it is split between internal and external communication. There are also subgroups devoted to VFA (VoteFromAbroad.org), the Democrats Abroad website, distribution channels, internal messages, Events-in-a-Box, and general communications question.

### **Best Practices Committee**

This committee was formed in 2011 by International Chair Vicki Hansen and it is currently chaired by Will Bakker (Luxembourg) The description provided by the International Executive Committee is as follows: "The Best Practices Committee is tasked with updating and maintaining the DPCA Handbook, and creating any other materials deemed necessary and appropriate for Country Committees, to assist new committees and existing committees in carrying out their duties. Metrics will be identified to measure country committee performance, and identify Best Practices within countries, such that these practices can be incorporated into the materials, so countries learn from each other."

### **Long-Term Strategy Committee**

## Appendix E4: DPCA Conference Calling Resources

To facilitate our communication as a global organization, Democrats Abroad maintains subscriptions to two online conference calling systems: Calliflower and WebEx. Each of these offers different advantages and limitations depending on the number of participants on the call, the need for interactive video, user connectivity, or if there is a need to restrict participation.

Both systems are available for use by country committees, but each Country Committee should designate a call manager who will be given the Admin passwords and who should be trained in call set up protocols and be aware of the pros and cons of each service.

### Calliflower, in brief

<https://apps.calliflower.com/login/>

- Calliflower is best suited for audio-only conference calls with a very limited ability to share a document and to allow participants to "Raise Hands" in a call-specific web page.
- Call invitations are triggered from the website, so each participant must be added to the address book and listed in the call invite. (This makes the system quite cumbersome for a larger number of participants.)
- Each participant receives a personal PIN number that is unique for each call.
- The system will generate an auto-reminder e-mail message 10 min prior to a scheduled call.
- Local call-in numbers are available for many (but not all) countries worldwide.
- Participants can also use Skype to call in to the "CalliflowerSkype" SkypeID.

### WebEx, in brief

<http://democratsabroad.webex.com>

- WebEx is a full-featured video and audio desktop conferencing system that integrates real-time video conferencing with live document and desktop sharing, and Voice over IP (VoIP) audio.
- WebEx does not require individual invitations to be sent from the system, but will generate a unique 9-digit "Meeting Number" or "Meeting Access Code" that can be distributed via regular mailing distribution lists.
- A meeting password can be set for each scheduled meeting.
- To join, participants enter their DPCA title, name, and the meeting password into the dedicated Democrats Abroad WebEx address.
- When first using WebEx on a computer, it will download and launch a separate Java application to run the WebEx session. Be aware that this can take several minutes on first installation.
- Participants are encouraged to use the built-in VoIP audio available within WebEx with the "Call using my Computer" button – this creates a free audio connection to the conference using your computer's built-in microphone and speakers.
- A US-based direct call-in number is also available for those unable to use the built-in VoIP feature. However, **calls to this number are charged to DPCA at the rate of 5¢/per minute.**

- Users with a webcam can share their video with other meeting participants.
- **To indicate a request to speak, participants should start a chat note with asterisks "\*\*\*HAND UP" to "Everyone" in the Chat box.** This will keep an ordered list of requests that come in and be visible to all participants. (The "Raise Hand" button does not keep track of speaking order, and is not always visible to other participants.)

### How to set up a Calliflower conference call

Please request the procedure from a member of the International Executive Committee.

### How to set up a WebEx conference call

A WebEx meeting needs to be started by an Administrator before other participants can log into the meeting.

Our WebEx account is at: <https://democratsabroad.webex.com/>

1. Admin Login account username and password is available from the Executive Director or a member of the International Executive Committee.
2. Select the "Host Log In" button at the top-right corner.
  - **WARNING: You MUST make sure that ONLY one Admin user logs into a WebEx meeting at a time!** If a second user logs in to the meeting with the Admin account, this can co-opt the session and you will no longer be able to manage the meeting -- it could shut down the whole meeting session. To help avoid this, do NOT save this login username in your browser.
3. When you first set up the meeting, you should copy down the 6-digit "Host Key." You need this number to be able to re-claim the meeting as the Admin Host if you happen to lose control.

### How to run a WebEx Meeting

1. The Host Admin should start the meeting 15-30 minutes before it is scheduled to start.
2. I recommend, if possible, to use two computers:
  - One to login as the Host Admin, and a
  - Second computer to login under your own name and e-mail as a User.
3. Pass the Admin rights to your user account
4. Pass the Presenter rights to other users who are presenting or posting materials to the site.
  - This will allow you to be visible to other users in the meeting under your own (real) name, and then still be able to reclaim Host Admin if needed. (This has been necessary in the past, and becomes a greater risk as more people in Democrats Abroad have access to the Admin account login details and may mistakenly login using that account. We are only entitled to one Admin account under our license terms.)

### Setting Up a New Meeting on WebEx

1. Login with the Host Admin account
2. Under Meeting Center tab, select "Schedule a Meeting"
3. Select the "Advanced Scheduler" and go through each of the 8 setup steps:

#### Required Information

- Meeting Type: Meeting Center Pro 200
- Meeting Topic: Title of the Meeting (Include the date and time in the title)
- Listed in Calendar: Check box



- Delete from my meetings: Do NOT check box
- Meeting Password: "**dems**" (use this for ALL meetings)

Click the Next Button (bottom right corner)

#### **Date & Time**

- Keep time zone set to New York time
- The Plan meeting time zones pop-up link can help in confirming time in multiple zones
- Check box for:"Attendees can join 15 minutes before start time"
- Check box for:"Attendees can also connect to Audio Conference"

#### **Audio Conference Settings**

- Select "WebEx Audio" as conference type
- Select "No Tone" as Entry and Exit tone (This is very important to avoid interrupting the meeting every time someone joins or leaves the meeting.)

#### **Invite Attendees**

- include your e-mail as an Attendee

(Depending on the number of participants, it may be better to ONLY invite yourself here and then forward that information by e-mail to others who are invited to the meeting. This is generally much easier than trying to include every person, and also verifying that each one has the correct e-mail address entered into the WebEx system ... which many do not.)

- leave remaining boxes UNchecked

#### **Registration**

- leave as None

#### **Agenda and Welcome**

- enter a brief agenda description including Title, date, and time of the call.
- leave other items unchanged

#### **Meeting Options**

- Check EACH of the following CheckBoxes
  - => Chat, Video, Enable high-quality video, Notes, Allow all participants to take notes, File transfer

#### **Attendee Privileges**

- Check ALL of the available CheckBoxes. (This is very important to enable participants to be able to have as much flexibility as possible during the call.)

4. Review all settings.

5. Now Schedule the Meeting with "Schedule Meeting" button at bottom right corner.

- If you have included your e-mail in the Invite Attendees, you will receive a meeting invite message with a summary of the meeting details and login instructions

## Appendix E5: The DPCA-Leadership Yahoo Group

The following is the official description for the DPCA Leadership Listserv:

Communication and discussion of internal DPCA business matters only. Membership by invitation only. Open to DPCA members, appointed officers, chapter chairs, Country Committee board members, Chairman's Advisory Committee (past Int'l Chairs, Vice Chairs, Executive Directors).

### DPCA-Leadership Rules & Guidelines (PLEASE REVIEW, especially #3 & #4)

1. DPCA internal business only. Send opinions, articles, etc. to the DemsAbroad listserv or a the appropriate Facebook group.
2. No posts to both DPCA-Leadership and DemsAbroad lists. Exceptions: Letter from Washington, Wednesday Wire, official DPCA communications.
3. Posts must be signed with first & last name and country or DPCA title. It helps us get to know each other.
4. Do not include trailing messages to which you are replying. A one or two sentence excerpt is permitted. Everyone you are writing to received the previous message, and they are tied together by a common subject line.
5. Posts should contribute to the substance of the discussion, not simply endorse the previous post (e.g. "I agree...") or congratulate the poster (e.g. "Well done...").
6. Do not include "cc" or "bcc" copies. Everyone on the list will get your message and people not on the list should not get your message. This listserv is for internal DPCA business.
7. Include links (URL's) to source material from the web rather than embedding such material in your email.
8. *Some additional suggestions:*
  - Do not change the subject line at all when replying. Having the same subject line allows all comments to be viewed in sequence - especially if you use Gmail.
  - Make your point briefly. Remember that many listserv members use Blackberrys or smartphones.
  - Remember you are writing to hundreds of Democrats Abroad leaders. Have the courtesy to address them, not just one person. If you are responding to a post, rather than beginning "Dear John..." consider something like "John has written...and I want to suggest...".

### History

DPCA-Leadership Yahoo Group (or "listserv") was initially created by the former Democrats Abroad Executive Director, Josh Kravitz. It was created on May 4th, 2004 under the impetus of Robbie Checkoway during Rachele Valladares's administration as DPCA International Chair. Prior to that point, Democrats Abroad used a Yahoo Group called 'DPCA Members'. It was decided to open our online discussions to a wider group of leaders than just DPCA members. For a while, Democrats Abroad kept both the DPCA-Leadership and DPCA Members Listserv alive, in case Democrats Abroad needed to communicate privately amongst members only. Eventually, Democrats Abroad gave up maintaining both, since it was determined that the DPCA Members Listserv was not required.

### Membership

The DPCA Leadership listserv is a communication tool for DPCA leaders. All DPCA members, CC leaders and former International officers are invited to participate.

Democrats Abroad leaders who do not hold an officially invited position can join the listserv with the recommendation of their CC Chair, their RVC or the International Chair. Country Committee Secretaries should annually submit a list of CC leaders to be included to the Leadership listserv. This list should be sent to the International Secretary.



Regional Vice Chairs periodically recommend a Start-up Committee Chairperson to participate in this listserv. Non-voting DPCA members, such as members of the IT team, may also request to be added.

If a member has completed his / her term or wants to be removed from the listserv, he / she may unsubscribe or request that the International Secretary remove him / her.

Membership is voluntary. When new leaders are elected, they are all invited to join. Although they are invited, only a subset accepts the invitation to join. As of December 31, 2011, the DPCA Leadership listserv includes 343 email addresses.

## Key Roles

As of the third quarter 2011, the DPCA International Vice Chair, Vicki Hansen-Thackray has been serving as the DPCA Leadership Listserv Moderator. Prior to Vicki assuming this role, Robbie Checkoway served as the DPCA Leadership Listserv Moderator for approximately six years in his roles as International Secretary and then while serving as International Vice Chair. Before that point, it is believed that John McCreery did it in his role as IVC. (NOTE: 'Moderating' is distinct from 'Membership management', which is the purview of the International Secretary. For four years, Robbie Checkoway did both.)

The moderators have all the same rights as the owner. The owner cannot be changed - once it is established it is permanent. (Josh Kravitz has no intention of ever interfering with the group. Emails go to his old Democrats Abroad email address, which is long since defunct. No problems are anticipated.)

The three key roles for managing the DPCA Leadership Listserv include: Moderator, Membership Management and Technical Support. For more on those roles, please consult the DPCA Leadership Listserv Memo of December 31, 2011.



## Appendix E6: Alphabet Soup: The DNC, the DPCA, the FEC, CC's and DexPat

This piece answers the following six questions:

1. What is the FEC?
2. What is the DNC
3. What is the DPCA?
4. How are the DNC and the DPCA related?
5. What is the relationship between the DPCA and individual Country Committees (CCs)?
6. What is DexPat and how does it relate to the DPCA?

### 1. WHAT IS THE FEC?

It's the Federal Election Commission. If you go to their website--[www.fec.gov](http://www.fec.gov)--you'll find the following:

In 1975, Congress created the Federal Election Commission (FEC) to administer and enforce the Federal Election Campaign Act (FECA) - the statute that governs the financing of federal elections. The duties of the FEC, which is an independent regulatory agency, are to disclose campaign finance information, to enforce the provisions of the law such as the limits and prohibitions on contributions, and to oversee the public funding of Presidential elections.

In sum, the FEC enforces campaign finance rules. Each political party and federal candidate must register with the FEC and submit monthly reports. These reports list the money received and spent during the previous month. Every donor of over \$200 per year must be listed with his or her address. Each registered party must conform to FEC limits on the amount any individual can contribute to a party in a calendar year (currently \$30,800) – and every registered party can engage in partisan political activity.

Violation of campaign finance law can lead to heavy fines and even prison sentences. The trial of former Senator John Edwards on six felony charges began in April 2012. Consider this excerpt from a 2011 story in the *NY Times*:

[FEC] officials have approved criminal charges; they decided that the hundreds of thousands of dollars that two Edwards donors gave to help keep his mistress in hiding were contributions that should have been reported publicly by his campaign fund because they aided his bid for the Democratic White House nomination. Edwards' lawyers have argued that the funds were gifts from old friends intended to keep the affair a secret from his wife, Elizabeth, who died of cancer in December.

A more relevant example (to Democrats Abroad) is the trouble that faced Al Gore in 2000 because he allegedly accepted contributions that might have been donated by a Chinese national.

Violating campaign laws is a very serious matter and none of us can take any liberties with them.

## 2. WHAT IS THE DNC?

The DNC is the Democratic National Committee. You can find the following on the website [democrats.org](http://democrats.org).

The Democratic National Committee (DNC) was created during the Democratic National Convention of 1848. For 162 years, it's been responsible for governing the Democratic Party and is the oldest continuing party committee in the United States.

The Committee plans the Party's presidential nominating convention and promotes the **Democratic Platform** — the statement of core principals at the heart of our Party. When the President is a Democrat, the DNC's remit is to support the President's agenda. The DNC is governed by its **Charter and Bylaws**. (You can find links to both documents in the Online Handbook.)



The DNC raises money, hires staff, and coordinates strategy to support candidates for local, state, and national office throughout the country. Additionally, the Committee works with various constituencies to respond to the needs and views of Democrats across nation.

Under the leadership of Congresswoman Debbie Wasserman Schultz, the DNC is composed of the chairs and vice-chairs of each state Democratic Party Committee and over 200 members elected by Democrats in all 50 states and the territories.

The **50-State Strategy** is a master plan of the DNC that affects Democrats Abroad directly. In January 2005, Howard Dean was elected chair of the DNC (with support from Democrats Abroad). His 50-State Strategy meant that the DNC would put resources into every state—even if the state was strongly Republican. So, for example, starting in 2005, field offices were set up in places like Mississippi and Alaska—places where the Democrats were very weak.

That also meant that Democrats Abroad was considered a state party worthy of support; the end result was that the DNC decided to pay for our Executive Director. When he was “elected” DNC chair in January 2009, Gov. Kaine pledged to continue the 50-state strategy and, in her remarks after her election as DNC Chair, Debbie Wasserman Schultz promised the same thing.

## 3. WHAT IS THE DPCA?

The DPCA is the **Democratic Party Committee Abroad**—more familiarly called Democrats Abroad or Democrats Abroad International. The DPCA is registered with the FEC. If you go to [www.fec.org](http://www.fec.org) you can see how much money we raised and spent each month. As a registered party, the DPCA is bound by contribution limits. In particular, no American can give the DPCA more than \$30,800 in 2012 (as mentioned in Part One of this Handbook). In addition, the DPCA can engage in political activity like taking out pro-Democratic ads and giving money to any federal candidate or political party.

The term “DPCA Member” may seem confusing. We are *all* members of Democrats Abroad from the time we sign up, aren't we? Since “Democrats Abroad,” is, in some sense, a synonym for the DPCA, how can someone be a member of Democrats Abroad but not of the DPCA? The DPCA Charter refers to “DPCA members” but it clearly means a subset of our total membership.





The simple answer is that when the Charter refers to DPCA members, it really means *voting* members of Democrats Abroad at the international level. These include the Chair and Vice-Chair of each of the Country Committees, the eight members of the International ExCom, the six elected members of the DNC and the Voting Representatives elected to represent those Country Committees that are allocated more than eight votes. In 2011, there were 50 Country Committees, and there were 125 “DPCA members”: fifty chairs, fifty vice-chairs, eight ExCom members, six DNC members, one delegate each for France and Germany, four delegates from the UK and five delegates from Canada.

The DPCA Charter contains rules for the Chapters of Country Committee, where they exist (Section 5.6 of the Charter). Nevertheless, Chapters have no special role in the DPCA as *voting members*.

#### 4. HOW ARE THE DNC AND THE DPCA RELATED?

Now it gets complicated. First, the DNC treats the DPCA similarly to the way they treat a state party. The DPCA has eight DNC members that attend regular DNC meetings. (Technically, the DPCA is allocated only four, but each member gets to cast only half a vote) Every four years, we elect delegates to the Democratic National Convention – just like a state party.

On the other hand, the FEC treats the DPCA as a separate account within the DNC. But even this is complicated in the details, because the DPCA is legally both *different from* and *the same as* the DNC.

From the FEC’s point of view, the DPCA is different from the DNC because each organization files separate FEC reports. That’s an obvious separation from the DNC: If John Mogul contributes \$5,000 to the DNC in July 2011, his name will appear in the Democratic Party July FEC report—not in the DPCA’s report. And vice versa: if John gives it to the DPCA, his name appears in our FEC report but not in that of the DNC.

At the same time, in a legally significant sense, the FEC treats the DPCA as an integral part of the DNC. In 2011, the maximum that an individual can give to a political party was \$30,800. The FEC treats this limit as the combined amount an individual can give to both the DNC and the DPCA. Thus, if someone gives the DNC \$20,000 in 2011, he can give only \$10,800 to the DPCA.

Of course, in most areas we are very much part of the DNC. The rules of the FEC provide just a soupcon of ambiguity.

#### 5. WHAT IS THE RELATIONSHIP BETWEEN THE DPCA AND INDIVIDUAL COUNTRY COMMITTEES?

The most important difference is that **no country committee is registered with the FEC**. Please review Sections 1.4 and 1.5 if this is a surprise to you. This fact has several important consequences, as follows.

No country committee has to file any report to the FEC: not monthly, not ever. In addition, there are no limits on how much an individual US citizen can donate to his or her country committee. If a US citizen wanted to give \$1 million to DA-Moldova, DAM could accept it without violating any US campaign finance law.

However, no country committee can spend any money on partisan political activity. DAM, for example, could **not** give any part of its \$1 million to any federal candidate, or pay for a partisan ad promoting any candidate or party. (Once again, you may want to review Sections 1.4 and 1.5 if this is news to you.)

This situation means that a **Country Committee cannot give money to the DPCA!** This prohibition is counter-intuitive, but it is central to all fundraising activities at the levels of country committees and the DPCA.

Individual members of a country committee—or, indeed, any American citizen—can give money to the DPCA. But money given to a country committee can never be passed on to the DPCA. The reverse direction is different: the DPCA can pay directly for any political “communication” that is organized by a country committee. Think of it as a one-way street. The DPCA, due to its FEC registration (and the



consequent limits on fundraising), is allowed to spend its funds more freely: on political candidates and on country committee events.

*Money donated to the DPCA from a member of a country committee must be given directly to the DPCA. If it touches any CC bank account, it cannot be forwarded to the DPCA.*

### **So what can a country committee do with its money?**

An individual country committee can use its funds to:

- Pay for a meeting room for an Annual General Meeting or any other meeting or event sponsored by the Country Committee. For example, the rental of a movie theatre to show a political film or of a hall to host a speaker.
- Pay for the printing and postage of a newsletter sent out to country committee members
- Pay for the expenses of the Global Primary.
- Rent a theatre for a showing of a political film.
- Pay all the expenses of a two-week holiday in Rio for the country committee's Chair.

The last point is more than a joke. It illustrates that the FEC does not care what a country committee does with its money, as long as it doesn't spend it on partisan political activity.<sup>1</sup>

### **6. WHAT IS DEXPAT (OR "AAO") AND HOW DOES IT RELATE TO THE DPCA?**

DexPat is the shortened title of the "Democratic ExPat Leadership Council." DexPat was set up by the DNC in early 2005. Its sole raison d'être is to raise money for the DNC from US citizens living outside the US.

You may very well ask, "Why did the DNC set up DexPat when there already was an organization that represented Democrats living abroad that was considered part of the DNC and that had been around for about 40 years?" That's a good question.

The DNC answer was that there were some very wealthy Democrats living in places like London, Paris, Geneva, Tokyo, Hong Kong and elsewhere who had no interest in getting involved in Democrats Abroad, but these folks could be persuaded to contribute to the DNC with the promise of "perks"—like VIP treatment at the Democratic Convention.

Admittedly, in 2010, no one gave the maximum allowable donation to the DPCA, but there were dozens of folks living abroad who maxed out to the DNC through DexPat. DexPat may have helped the DPCA raise money, indirectly. In 2006, the DPCA received a letter from Andy Tobias, Treasurer of the DNC, that stated that anyone who made a large donation to the DPCA would get the same perks as someone contributing the same amount to DexPat.

Things changed in 2012. First, DexPat has been renamed Americans Abroad for Obama (AAO). Second, the Andy Tobias agreement is no longer in effect.

This has led to situations where DA donors can go to some AAO events but not to others. It is rather ad hoc. We expect that our relationship with AAO will stabilize and that, while no formal agreement will be chiseled in stone, some sort of de facto relationship will evolve. Keep an eye on the DPCA-Leadership list and listen at DPCA meetings (by phone or in person), and you'll be in the know.

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<sup>1</sup> The DPCA may care, however, when it comes time to recognize a country committee's Chair and Vice-Chair as voting members of the DPCA. For more details, see the DPCA Charter or International Counsel.