



CONVENTION OF STATES

LEGISLATIVE LIAISON *Training Manual and Resource*

2014-2015

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PART 1 - INTRODUCTION

Welcome to the Convention of States team! As a Legislative Liaison, you stand at the front of the movement. Without you stepping up to build valuable relationships with your legislators, we would be unable to function as a grassroots operation. You will be reporting progress to our national office and your State Director so that we can work together to build a dynamic, and effective grassroots movement. In this document, we will walk you through a mini-training program to orient you to your new position.

Each state's Legislative Liaison is charged with actively lobbying the state's legislators to gain support for our application and serving as the liaison between the legislators and the rest of our organization. This will involve:

- Building relationships with the legislators and helping to earn their support to pass our application for an Article V convention.
- Identifying and soliciting potential sponsors and co-sponsors for our Resolution.
- Connecting legislators with District Captains and grassroots supporters.
- Reporting progress to your State Director (and the COS national office) by submitting a weekly report.
- Keeping in close, regular contact with the legislative sponsor and his/her staff during session so that you can notify your state team and the COS national office when hearing dates or floor votes are scheduled.
- Advising the rest of the state team in a timely manner about which legislators need to receive more phone calls, e-mails, and personal visits from their District Captains and grassroots supporters in their districts.
- Devoting approximately 15–20 hours per month toward this project.

“The Convention of States Project wants to use the provisions of Article V of the Constitution to transfer the bulk of domestic authority from Washington, D.C. to the states. While this is perceived as a conservative effort, it really should be viewed as nonpartisan on ultimate questions of political philosophy. We have only one core agenda item—moving the decisions on domestic issues to a more local level. This would allow for the implementation of a variety of approaches rather than keeping us locked into a single approach dictated by Washington, D.C.”

*-- Michael Farris,
Head of the Convention of States Project*

PART 2 – ARTICLE V TRAINING

As your state’s Legislative Liaison, you will often be on the front lines in answering questions about the history and operation of Article V and responding to concerns or objections. It is therefore essential for you to be well-versed in Article V, the most common concerns and objections to the Convention of States process, and how to respond to these objections.

To ensure that you are appropriately equipped for your role in this regard, we require that you review the online Article V Training Program in addition to this Legislative Training Manual. Numerous helpful resources are also available in the Citizen’s Toolkit on the main page of our website (<http://conventionofstates.com>) Reviewing these materials will give you the necessary information to know far more about the Article V process than most legislators and citizens. You will be able to walk in confidence knowing that you have mastered the basic arguments and that you have access to true Article V experts through the COS national team. At the completion of your review, one of our staff members will conduct an oral “quiz” with you and answer any remaining questions that you may have.

Finally, please be sure to check our national “progress report” regularly, at <http://conventionofstates.com/progress-report-1114/>. It provides a frequently-updated summary of how our applications are progressing through the states as well as an overview of our grassroots growth.

PART 3 – THE PROCESS AND YOUR ROLE

A. Off-Season (When the Legislature Is Not in Session)

1. Familiarizing Yourself with the Legislative Calendar in Your State

It is essential to know, early on, the key dates in your legislature’s calendar, including:

- Starting date
- Filing deadline
- Crossover (the date by which legislation must be passed by one house in order to go to the other house for consideration)
- End of session

You should be able to find an accurate calendar on your legislature’s website.

2. Learning the Ropes

If you are new to legislative work in your state, it will be immensely valuable for you to find one or more friendly and knowledgeable organizations, lobbyists, legislators, or staff members to spend some time with you and share insight regarding the key players, influential members, committee memberships, etc. Please contact the national office if you have any questions. We may be able to help you identify local organizations and lobbyists who can share their insights on your state’s legislature.

3. Reconnaissance – Who and What You Need to Know

Step 1 – Determine the likely committee assignment(s) for our Resolution. It is typically sent to the “Rules,” “Judiciary,” or “Government Affairs,” Committee, but ask a friendly, knowledgeable legislator where he/she thinks the Resolution will be sent. Knowing which Committee(s) will hear the Resolution is essential to prioritizing legislative contacts and grassroots activities. In some legislatures, a bill must pass multiple Committees before it goes to the floor for a vote.

Step 2 – Prioritize your legislative contacts. Concentrate your efforts first on leaders—Speaker of the House, Senate President, party leaders, etc. Then focus on members of the Committee(s) that will hear our Resolution and legislators who are influential members of the party caucus, etc.

Step 3 – Gather information about legislators’ likely positions from:

- Past COS Votes (if your state has already considered our application). A list of past votes on the COS Resolution is available here:
<https://www.dropbox.com/s/o9k63g1j0lgkaxz/Article%20V%20Vote%20Breakdown%20%28COS%29.xlsx>.
- COS Data. We keep one massive spreadsheet that contains all of the information we have on legislators. It is organized by state. This information comes from:

- Conferences where we have given presentations (i.e., ALEC)
- Volunteer contacts
- Our own contacts – following up on e-mails, tips, etc.
- As our Legislative Liaison, you are entitled to access this information (provided you have returned your executed legal agreement), and we want you to use it. You can access this document here:
<https://www.dropbox.com/s/ip45gqi8amu0z99/Legislator%20Contact.xlsx>. It also available via Google Drive, if you have an online Google Account. Please contact Rita Dunaway (ritadunaway@selfgovern.com) if you would like access to the online Google Drive version.
- Recent, past vote on Article V Balanced Budget Amendment resolutions or other Article V resolutions. A partial list of recent BBA votes is available here:
<https://www.dropbox.com/s/5sjj2w3qyo0lpby/Article%20V%20Vote%20Breakdown%20%28BBA%29.xlsx>. Be careful with this. Knowing how a legislator votes on a resolution to hold an Article V Convention for a BBA may tell you something about his or her position on Article V, but it's not enough for you to count the person as a "safe vote."

Step 4 – Approaching legislators to determine their positions/ ask for their support. You should make sure every legislator is personally approached, provided with a copy of our resolution, and asked to support our legislative effort.

- Determine who should make the initial contact. Ideally, this will come from someone who has a direct connection with the legislator. In some cases, you may want to attend a face-to-face meeting with the "connected" person and the legislator. We want as many different people making contacts as possible, and we want the legislators to know that their own constituents are actively engaged. We recommend that the initial contact be made by:
 - A COS supporter with a strong personal connection;
 - A District Captain; or
 - A COS volunteer in the district
- Find out about the initial contact. Be sure to ask those who meet with the legislators to report back to you so that you can record all the data in the Action Center and follow up accordingly. If you don't hear back from them, take the initiative to call them so that you can get the information.
- Make a follow-up contact.
 - Gather as much information as possible from the initial contact person.
 - Call the legislator's office and ask the staff member how familiar he/she is with the COS project. Tell him/her that you would like to schedule an appointment to discuss the matter and that you will send some background information in advance.

Do not overwhelm each assistant/legislator with too much information; send just enough to make them interested in asking for more.

- When you meet with the legislator, give him/her your business card, the color tri-fold brochure and the color, 24-page handbook. Ask whether he/she had an opportunity to review the materials you provided earlier (this will help you gauge where to begin your discussion). During the meeting, ask what concerns or objections, if any, the legislators may have regarding supporting this issue and how we can address these issues.
 - Thank the legislator and staff for their time as you leave.
 - Send a follow-up e-mail thanking the legislator again for his/her time, and include a link to our Legislators' Compendium.
 - Enter information about the legislator's position into Action Center Lobbying area.
 - If the legislator is opposed to COS, be sure to find out WHY. The strategy for converting him/her will depend upon whether he/she is personally opposed (i.e., due to fears of a runaway convention or belief that things are fine the way they are) or is opposed due to pressure from grassroots opponents or organizations.
- Compile the information about legislators' positions into a weekly report for COS. You can use the spreadsheet form we created for this purpose or create your own format, but it is important for us to receive the data to import into our national spreadsheet. This should be sent to Rita Dunaway, ritadunaway@selfgovern.com, with a copy to Robert Kelly, robertkelly@selfgovern.com.
 - For Opposed Legislators, refer to Part 4, on how to convert them.
 - For Supportive Legislators, ask District Captains or grassroots supporters from their districts to approach them about co-sponsorship. Find out how to obtain co-sponsorship forms, and have constituents take them to the meeting with the legislator, if possible. Also, ask the legislator for an official "endorsement" of COS.

This process will, of course, continue to some extent once the legislative session begins, but you should gather as much information as possible during the off-season, because things tend to move very quickly once session begins, and legislators are often too busy at that point to have lengthy discussions or educate themselves about the issue.

4. Securing a Prime Sponsor

The choice of a prime sponsor is incredibly important, and there are many factors to consider. Here is a list of recommended criteria, in order of priority:

- a. Committed to COS as best Article V method
- b. Member of majority party
- c. Well-respected; in good standing with caucus and party leadership
- e. Member of relevant committee

- f. Member of Mt. Vernon Conference (Assembly of State Legislatures) or the Article V Caucus
- g. Responsive and friendly staff

If you aren't sure where to start, review the national COS legislator spreadsheet, where we may have noted a legislator or two in your state who have expressed interest in possible sponsorship.

Also, if you are in a purple state, you should try to secure a prime sponsor who is a member of the majority party as well as a co-sponsor of the minority party.

The choice of a prime sponsor is extremely important, so you should discuss your recommendation with the rest of your state team and the national COS legal team.

Once the prime sponsor is secured, provide him/her with our special training summary designed especially to help prepare legislative sponsors with the basic information they need to respond to questions and objections they will face. Seek direction from the prime sponsor as to whom to approach as co-sponsors, and as to the desirability of having a prime sponsor in the other chamber.

Be sure to develop an excellent relationship with the prime sponsor's staff! Excellent communication with them once the session begins is priceless.

5. Make a State Plan in Collaboration with Other States Leaders.

Meet with your other state leaders to develop a cohesive, overall strategy for winning your state. This strategy should identify key legislative districts in the state and include a game plan for how to recruit and mobilize grassroots volunteers in those districts.

Key legislative districts should be determined first by looking at which legislators hold leadership positions within the state. Next in importance are the leaders and members of the committees our Resolution will have to go through to make it to the floor. Finally, look for influential legislators whose support can make a major impact on the floor. It is also important to prioritize districts by how supportive the legislator there is. If a legislative leader already supports COS, his district will be less important than that of a committee chairman who is on the fence.

The major contribution of the LL to the state strategy should be to identify the districts where it will be most valuable to bring grassroots pressure. Then the State Director and Coalitions Director can work to recruit grassroots volunteers in those key districts. Of course, an important

Never underestimate the importance of a good relationship with the legislator's staff!

"Since they will always be your contact person in each office, a good relationship [with them] is necessary to the success of your passage of the COS Resolution. Even if you are "best friends" with the legislators outside of the office, when you call their office, the assistant is your first contact and they must be made to feel important ..."

*-Linda Brickman,
Arizona LL*

part of all this is to make sure that the other leaders understand your role in the process and that you understand theirs.

6. Be Available to Attend Presentations Given By Other State Leaders or District Captains

You may be in the best position to answer questions that come up at these events, and they may provide important opportunities for you to interact with legislators in their own districts, surrounded by COS supporters.

B. During Legislative Session

1. Track the Legislation.

Everyone will count on you to alert them to the dates/times of hearings and votes on our Resolution. This may be the most important duty you have during session. Please refer to our “Protocol for Legislative Tracking” document, in Appendix A, for a detailed description of what we believe may be the best practice.

It is essential to find out when the resolution will be heard in committee, because this will be the only opportunity for the state leaders and grassroots supporters to testify before the legislators!

As an important initial step, you will need to determine the most reliable source for scheduling information. In some cases it may be your state legislature’s website, but in other cases the sponsor’s staff or the committee chairman’s staff may be more reliable. Ideally, you will have at least two methods of gathering this data since there may be gaps, at times, in one method or another.

2. Communicate with your state team.

Alert the State Director and Coalitions Director to which committee members and key legislators are opposed to COS, or whose positions are unknown, so that they can know where to concentrate their efforts. When legislation is moving forward, daily communication of some sort is necessary.

3. Get COS on Caucus Agendas.

Each party in each house has regular meetings that are more informal than legislative hearings. The House Republicans or the Senate Democrats, for example, will meet behind closed doors to discuss issues of importance. We have been invited to address our COS applications in several of these caucus meetings and they are invaluable.

Your goal should be to have COS on the agenda for at least one caucus meeting of the majority party in each house. Michael Farris will make every effort to come in person to address such meetings. We have other legal team members if his schedule won’t permit his appearance on a particular date.

Caucus meetings are usually the single best opportunity to introduce legislators to the Article V process and win over opposing legislators. The national office has made these meetings a major priority for our overarching legislative strategy. If you have questions about how to get COS on the caucus agenda, ask your sponsor or a friendly legislator within the state. The national office can also provide some additional guidance.

4. Organize Lobby Days/Rallies.

Work with the prime sponsor to reserve meeting space for a COS lobby day or rally at the capitol. Refer to the “Lobby Day Kit” in Appendix C for more details on this.

5. Continue to Meet with Legislators.

For those whose position is unknown, schedule an appointment and continue to offer to answer their questions. Ask them, “What would it take for us to get you on board?”

6. Learn the Rules.

At the very beginning of the session, learn the Rules that are adopted to govern the procedures in both legislative houses.

“It is extremely important for the legislative liaison to know the Rules of the House and Senate BETTER than the legislators. The Rules can and do change before each session depending upon the whims of the Senate President and Speaker of the House. Make sure you get a copy of each set of Rules, as they are different, and study them before the Session gets into action.”

-Linda Brickman, AZ LL

7. Prepare for/Attend Committee Hearings.

As soon as a committee hearing is scheduled, notify your “expert” witnesses so that they can plan to testify, and inform the rest of the state team (and Rita Dunaway on the COS team) so that they can spread the word and ensure a great turnout. Work with SD and CD to get key district captains and other supporters to testify, make calls, and send e-mails. In general, the COS national office will supply the legal expert witnesses to appear at your hearings. Michael Farris is our lead expert, and we have others.

8. Prepare for Committee/Floor Votes.

As soon as a vote is scheduled, inform the rest of the state team (and Rita Dunaway on the COS team) so that they can spread the word for the entire state’s grassroots network to make calls, send e-mails and ensure victory!

PART 4 – CONVERTING OPPOSED LEGISLATORS

As a starting point, it is essential for you to understand *why* a particular legislator is opposed to COS. Generally speaking, there are two reasons a legislator might be opposed: substance or politics.

The Opponent on Substance

Some legislators are opposed because they have bought into substantive arguments against our application or against using Article V (i.e., the “runaway convention” myth, uncertainty about the Article V process, etc.). In this case, the solution is to fashion persuasive arguments and provide information that can change the legislator’s mind. Respond to these concerns by providing good, accurate information in a respectful manner. Check out our online response library in the Citizen’s Toolkit, under “Opposition Response.” This contains a number of brief documents that cover the most common objections. Provide the legislator with our “Legislator’s Compendium,” also available on our website, which contains a wealth of scholarly information on Article V and responses to common objections.

The Politically-Motivated Opponent

Some legislators are opposed due to political pressure. In this case, the key is to effectively use grassroots pressure to convince the legislator that it will be politically beneficial for him/her to support our application. In short, they need to hear from more COS supporters, and/or from more politically *important* COS supporters, than they do from COS opponents.

Here is a list of 10 ideas for converting opposed legislators, including those who plan to oppose our Resolution solely due to opposition from constituents:

1. Contact Rita Dunaway to find out whether/how many of the legislator’s constituents have signed petitions that have been delivered to the legislator. Use that number to get your foot in the door.
2. Use the Action Center to contact every COS volunteer in the legislator’s district, and ask them to call and send e-mails to the legislator. Explain that this may be the most important thing the volunteer can do to ensure the success of COS in your state.

“In roughly 4,000 state legislative districts around the country, you need roughly 100 people in each district to be willing to call their legislative representative and ask for a convention... That’s not a high bar. And I started talking to reps all over the country and they said, ‘We don’t get 100 calls on anything. If you can generate a hundred calls then we’re going to be motivated to at least take a serious look.’”

*-Mark Meckler, President,
Citizens for Self-Governance*

3. Ask the District Captain (or another volunteer) from the legislator's district to set up meeting between the District Captain, legislator and an "expert" on COS from within your state. Attend this meeting with them, if possible.
4. Ask the District Captain to help you identify a "friend" of the legislator to try to persuade him/her.
5. Review the legislator's website and search public disclosure forms to find influential donors or supporters who might help win the legislator.
6. Work with your Coalitions Director to get supportive organizations/individuals within the district to assert pressure.
7. Schedule a phone call with Michael Farris for a particularly influential member.
8. Write an Op-Ed or Letter to the Editor, arguing for a COS and asking readers to contact the legislator. Submit it to the newspaper in the legislator's district.
9. Ask the State Director, Coalitions Director, or a District Captain to help organize a COS event in the district and invite the legislator. Even if the legislator does not attend, you will be winning his/her constituents and making allies.
10. Find a COS-supportive lawyer in the district to meet with the legislator.

APPENDIX A - LEGISLATIVE TRACKING PROTOCOL

Thank you for volunteering as Legislative Liaison for the Convention of States Project! We are so grateful for the dedication of talented, hard-working individuals like yourself, without whom our efforts could not succeed.

One of the most important duties of our LLs is to track our resolution as it makes its way through the legislative process and to keep your state team and our national office updated on the scheduling of committee hearings and floor votes.

Rita Dunaway, our Staff Counsel, will be your primary point of contact with our national office for this purpose. You can reach her at ritadunaway@selfgovern.com or (540) 830-1229. If you cannot reach Rita and have urgent information, please contact Staff Counsel Robert Kelly at robertkelly@selfgovern.com or (540) 441-7227.

In an effort to help you develop a routine system for keeping on top of legislative developments, we have devised the following protocol:

1. Make an initial contact with the sponsoring legislator and let him/her and his/her staff know that you should be the first contact for any developments.
2. Check your legislature's website daily.
 - Please be sure you are familiar with using the website, including finding out about committee hearing dates and agendas, etc.
 - At the beginning of session, speak with a member of the sponsor's staff to find out how reliable the website is and how frequently it is updated. Unfortunately, some are unreliable. If yours is in this category, you will need to make more frequent contacts with the sponsor's office.
3. Check in with the sponsor or his/her staff *weekly* (if website is fairly reliable) to obtain updates, inquire as to where pressure may be needed, etc. Legislators are busy and may forget to communicate information with you.
4. Contact your state director AND Rita at COS *immediately* upon learning of a hearing date, a problematic legislator, etc. This is essential for us to effectively mobilize our grassroots in time to make a difference.
5. Please send Rita a weekly update each Monday after checking in on the status of the legislation—even if it is just to say that nothing has been scheduled. It may be convenient for you to attach the previous week's report of legislative contacts (see spreadsheet form provided with this manual) to this e-mail so that you can plan on sending us a single weekly e-mail (in addition to notifying us of any new developments throughout the week).

APPENDIX B - LEGISLATIVE CONTACT REPORTING FORM

If you would like to use the Excel Spreadsheet form we have created, you can access it at:

<https://www.dropbox.com/s/8ydmu7hp7iwbhth/Legislator%20Contact%20Report%20Template.xls>
x.

Please feel free, however, to use your own format (even a simple e-mail with a list) to provide the essential information contained in the template, which includes:

- **Legislator's Name**
- **State and House (House of Representatives or Senate)**
- **Legislator's Contact Info.**
- **Legislator's Position on COS**
- **Name of COS Supporter Who Made Contact**

APPENDIX C - LOBBY DAY KIT

Blueprint for a Convention of States Lobby Day

What is a Convention of States Lobby Day?

A “Lobby Day” is an event organized in your state capitol for the specific purpose of demonstrating grassroots support for the Convention of States resolution pending in your state legislature. Grassroots supporters gather for a brief, motivational presentation with the state leadership team, and then are provided with written talking points and cards to leave with their legislators, asking them to support the resolution.

Why is it important to hold a Convention of States Lobby Day?

For some legislators, the decision of whether or not to support our resolution will come down to whether they believe more of their constituents support or oppose the effort. When these legislators find out that COS supporters have come, in person, to seek their support for the resolution, they are likely to be motivated to support it.

What if the legislators are not available to speak with COS Supporters on Lobby Day?

Don't be discouraged! The important thing is to leave the Lobby Day cards that are filled in with the constituents' names and addresses. This information WILL be recorded for the legislator to see, so the effort is still absolutely worthwhile! Also, don't underestimate the importance of visiting with the legislators' staff members. They are trained to pass on constituents' concerns to the legislators, and legislators often rely heavily on their staff's impressions and recommendations in deciding which positions to take.

How do I organize a COS Lobby Day?

The process is very simple and does not require a lot of time. Here are the steps:

- Ask the resolution sponsor (or a member of his or her staff) to reserve a suitable room at the capitol, preferably for a date and time when he or she might be able to attend and say a few words about the importance of passing the resolution.
- Ask your SD and CD to notify all district captains and grassroots supporters, and impress upon them the importance of a good turnout for the event. If possible, ask attendees to RSVP so that you have a good estimate of how large your group will be.
- Print an appropriate number of Lobby Day cards, FAQ sheets, and copies of the resolution. Note that each attendee should have a Lobby Day card and copy of the Resolution to leave with each of his or her legislators. Print some extras so that attendees can also leave them with legislators from neighboring districts, etc., if they like.
- A day or two before the Lobby Day, circulate an e-mail to confirmed attendees with helpful logistical information, such as parking information, where to enter the building, arriving early to go through security procedures, wearing professional attire, etc. Remind them of the importance of a good turnout!

What to Do at the Event:

- Ask attendees to sign in with their name and district number (or the names of their legislators if they don't know the district number).
- Thank attendees for coming, and thank the resolution sponsor for leading the charge.
- If the sponsor or other supportive legislators are in attendance, allot time for them to speak to the importance of the measure.
- Appoint someone from your state leadership team to give a brief motivational speech about the effort in your state.
- If possible, show this video: <http://www.youtube.com/watch?v=JdsjrVR-JUk>.
- Distribute Lobby Day packets to attendees and explain the procedures for visiting the legislators. Offer assistance to any attendees who want it. You may need to pick up directories in the capitol lobby containing the office numbers/locations of each legislator.

Checklist for Packet for Each Lobby Day Attendee:

- Card for each legislator;
- Copy of resolution (including bill number) for each legislator;
- Copy of "Why We Support [Resolution Number]" Talking Points
- Frequently Asked Questions

We are here to help! If you have any questions, please let us know. We will do whatever we can to help ensure the success of your event!

Dear Representative _____,

I support _____, a resolution calling for Article V Convention of the States for the purpose of proposing amendments to limit the power, scope and jurisdiction of the federal government. Please support this effort to correct the gross abuses of power in Washington, D.C. by implementing the plan the Founding Fathers designed for this very situation.

Sincerely,

Name

Address



CONVENTION OF STATES

A PROJECT OF CITIZENS FOR SELF-GOVERNANCE

www.conventionofstates.com

Dear Senator _____,

I support _____ a resolution calling for Article V Convention of the States for the purpose of proposing amendments to limit the power, scope and jurisdiction of the federal government. Please support this effort to correct the gross abuses of power in Washington, D.C. by implementing the plan the Founding Fathers designed for this very situation.

Sincerely,

Name

Address



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www.conventionofstates.com

APPENDIX D – FREQUENTLY ASKED QUESTIONS

An opportunity to share COS on a local radio or tv station has arisen. What do I do?

- Contact Tamara Colbert at tamaracolbert@selfgovern.com.

How do I get Mike Farris or Mark Meckler to attend an event in my state?

- Contact your Regional Grassroots Director, Sophie Linde or Laura Fennig, at sophielinde@selfgovern.com or laurafennig@selfgovern.com.

If I want to make up my own materials, how do I get them approved?

- Send them to Rita Dunaway at ritadunaway@selfgovern.com.

What if our state leadership positions are not all filled?

- One or both of the other leaders need to assume the role of Acting State Director, and make finding a State Director a priority. The national office also has staff who can assist as Acting State Director to a limited degree. Of course, there is no substitute for a leader on the ground in the state.

I need advice/help reaching out to Democrat voters/legislators/coalitions and/or countering JBS/Eagle Forum objections and activity in my state.

- Check out our website, which has a wealth of information on these subjects. In particular, the section of the Citizen's Toolkit entitled "Opposition Response," contains articles that respond to the most common objections.
- If you need further assistance with this, contact Rita Dunaway at ritadunaway@selfgovern.com.

I need coaching on how to interact with the media.

- Contact Tamara Colbert at tamaracolbert@selfgovern.com.

I need advice/help with planning an event.

- Work with your State Director on this. For lobby days or other legislator-focused events, contact Rita Dunaway at ritadunaway@selfgovern.com.

I missed a conference call. How can I get caught up?

- These calls are recorded and can be accessed in your shared Dropbox folder. If you need help connecting to this folder, please contact your Regional Grassroots Director, Sophie Linde or Laura Fennig, at sophielinde@selfgovern.com or laurafennig@selfgovern.com.

How do I obtain information about other states' progress?

- Obtain our up-to-date "Progress Report" at <http://conventionofstates.com/progress-report-1114/>.

APPENDIX E – PAYMENT POLICY AND FORM

STATE PAYMENT POLICY

Convention of States Project will cover the cost of state expenditures which can be paid in advance, based on approval from the national office. Requests will be made through the attached form. The COS team will assess these requests, and inform you of our decision.

State Directors, Legislative Liaisons and Coalitions Directors must send requests to payment@selfgovern.com, and attach the request form(s) to the email.

District Captain payment requests must go through the State Director, who will then forward them to payment@selfgovern.com.

Requests must be submitted at least three weeks prior to the payment due date. All requests must include an *invoice* for the payment.



CONVENTION OF STATES

A PROJECT OF CITIZENS FOR SELF-GOVERNANCE

Payment Request Form (Type directly in form - No need to print)

Order Information

Name: _____

Position and State: _____

Event Name _____

Event Host _____

Date of Event: _____

Expected Attendance: _____

Cost of Event _____

Location _____

List Anticipated Dignitaries _____

Type of payment require (visa, check, wire transfer) _____

Payment Contact **Email:** _____ **Phone:** _____

Payment Due Date _____

*All direct payment requests must be submitted **THREE WEEKS** prior to the payment due date
No Convention of States funds will be used to purchase alcoholic refreshments*

COS Office Use Only

Date Received:

Date Approved:

Comments:

Signature of Approval

Date

APPENDIX F – PRINT ORDER POLICY AND FORM

State Leaders Print Policy

The COS office will provide one all-inclusive palm card to meet the print needs of each state. These palm cards will be requested using the attached form, and will be reviewed by the COS staff. Once approved, they will be shipped directly to you from our off-site warehouse.

State leaders must send print requests to printorders@selfgovern.com, and attach the print request form(s) to the email.

Print requests from District Captains must go through the State Director, who will then forward them to the national office.

Print request forms must be submitted at least 2 weeks prior to the date the material is needed.

Legislator Packet Policy

Specific to Legislative Liaisons: The Convention of States national office will supply Legislative Liaisons with legislator packets. These packets are to be distributed specifically to state legislators. The packet will consist of the Handbook for Legislators and Citizens, the Convention of States model application and a cover letter (written and printed by the Legislative Liaison).

You will receive the handbook(s) and model application(s) separately, and should collate the items before visiting with a legislator. Please use the above print policy when requesting your legislator packet.



CONVENTION OF STATES

A PROJECT OF CITIZENS FOR SELF-GOVERNANCE

Print order Request Form (Type directly in form - No need to print)

Order Information

Name: _____

Position and State: _____

Quantity: _____

Reason for Quantity: _____

Address of Receiver _____

Please, send all print order requests to printorders@selfgovern.com

Or mail orders to: 17341 D Pickwick Dr., Purcellville VA 20132

(Print order must be received 2 weeks prior to your need)

COS Office Use Only

Date Received:

Date Approved:

Date order was sent to the warehouse:

Comments:

Signature of Approval

Date