



CONVENTION OF STATES

A PROJECT OF CITIZENS FOR SELF-GOVERNANCE

STATE DIRECTORS TRAINING MANUAL

Welcome to the Convention of States team! As a State Director, you stand at the forefront of the movement. Without you stepping up to coordinating your state, we would be unable to operate as a fully functional grassroots operation. Feel free to take authority and “creative power” over your state. You will be reporting to our National office, and consulting with us on major decisions, but for the most part, the buck stops with you. In this document, I’m going to walk you through a mini-training program to get you oriented to your new position. If you have more questions by the end, feel free to shoot me an email at sophielinde@selfgovern.com.

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1. Getting Started

Learning About Article V

As the State Director, it’s important that you are well versed in Article V process and details concerning the Convention of States project. I’m going to direct you to a few important documents and videos that effectively outline the issue and our response. Follow these learning steps, and you will develop a good working knowledge on the issue.

Step 1: Your first resource is our **Convention of States Handbook**. This document can be found under “Citizen’s Toolkit” on the Convention of States website homepage. This booklet effectively outlines the problem, our solution, and includes an article by Michael Farris that refutes the argument that the Constitution was illegally adopted. In addition, in the Appendix you can find a copy of a draft application for a convention of the states. This application is also separated into its own document in the Citizen’s Toolkit for easy accessibility. This application is what we are asking state representatives to pass. I highly recommend that you read the entire Handbook. It is well worth your time.

Step 2: Take few minutes to review the articles under the “Learn” tab on the Convention of states website. A few of the materials, *The Problem*, *The Solution*, and *The Strategy*, will clearly

explain the purpose and mission of the project. The *Frequently Asked Questions* document answers common questions about a convention of states and attempts to give simple and concise answers.

Step 3: If you would like more information on any of the following topics, our youtube channel has helpful video explanations that will allow you to learn directly from the experts!

<http://www.youtube.com/channel/UCC0eXtGEMvjxpdYQI2LUiVw>

Step 4: Go to our “News” tab, and review important articles pertaining to our movement, written by prominent experts in the field.

By now, you should be very well familiarized with Article V and what Convention of States is all about. If you still have questions that haven’t been answered, feel free to contact me and I’ll make sure you get a good answer.

An important note on language: As you speak to people about a convention of states, make sure that you NEVER refer to it as a “constitutional convention” or “con-con”. This is NOT a constitutional convention - it is a *Convention of States* for the purpose of limiting the power and jurisdiction of the federal government. The Constitutional Convention was the specific convention that proposed the Constitution in 1787. When people use this term, hearers are generally concerned that we are seeking to rewrite the constitution. This is absolutely incorrect. We are seeking to *amend* the constitution through one of the two methods that the founding fathers clearly outlined in Article V of the U.S. Constitution.

Distinguishing our effort from others:

An effective way to tag line our effort is with the idea that “our (COS’s) solution is as big as the problem”. Other organizations, like the Balanced Budget Amendment, seek to call a convention for a single amendment. We agree that topics like balancing the budget will be an important part of saving the country, but we do not believe that a single amendment can solve the crisis we face today. Under our convention, anything that *seeks to limit the power and jurisdiction of the federal government*, can be brought to the floor and discussed.

2. Your Job Description

Learning About Your Job

Let’s talk about how you fit into the puzzle. First, let’s go over your job description.

State Director (one per state)

As the State Director, you will guide your state to victory and act as a liaison between statewide volunteers and the Convention of States national office.

Responsibilities include...

- Recruit District Captains and mobilize volunteers in your state.
- Build state victory strategy with your state's leadership team, and host regular state conference calls.
- Speak at events to raise support and rally efforts across the state.
- Report weekly progress throughout your state to Convention of States, and participate in monthly conference calls with other State Directors and State Leaders.

Let's talk about each responsibility one-by-one.

Recruit District Captains and mobilize volunteers in your state. -

Our goal is to have a District Captain in each of your state's legislative district with a minimum of 25 active grassroots volunteers working under that captain. The District Captain organizes and maintains communication with the volunteers in their legislative district. They will coordinate attending events in the community and consistent contacting of legislators.

Each state's grassroots volunteer goals are unique to the specific state's population and legislative layout. The national COS office will provide you with these goals. Your volunteers will be called on to regularly contact their legislators, especially during your legislative session, attend events and legislative hearings as able, and continue to recruit and spread the COS message throughout their community.

As State Director, we are relying on you to build your team of District Captains. This includes recruiting, interviewing, and appointing. You are responsible for frequently checking your applications folder on the Action Center and scheduling interviews with each of the viable applicants. Once you have decided to appoint an applicant, you will need to send them a modified legal agreement to be returned to Robert Kelly at robertkelly@selfgovern.com, send them the Getting Started Guide and official COS policies, and change their status from pending to active on the Action Center. If you have questions regarding appointing District Captains, please let me know and I can walk you through the process in a more detailed manner.

Build state victory strategy with your state's leadership team and host regular state conference calls.-

As the State Director, one of your most important responsibilities is to craft a strategy for success in your state. This will be done in conjunction with your Legislative Liaison, who should be the expert on your state's legislators and legislative process, and your Coalitions Director, who should be focused on reaching out to and connecting with other like-minded groups within the state. Please use the staff at the national office as resources as you begin to craft this strategy.

Developing and implementing a specific strategy and clear goals will allow all of the COS volunteers and leaders in your state to work as a team. Expect reporting from your captains and encourage them to create district specific goals to help keep themselves accountable. We want everyone to know that they are not alone in their efforts and increased communication and

involvement will make that point.

To successfully execute your state team strategy, we expect you to hold regular conference calls with the other state leaders and your district captains. You all are working together to achieve victory in your state and regular communication is the first step to accomplishing victory. Occasionally open up your conference calls to all of your state members on the Action Center. Our desire is to see each state deeply connected throughout each layer of volunteer leadership.

Speak at events to raise support and rally efforts across the state.-

In a sense, you are now the face of COS for your state. As such, events are an excellent way to present large groups of people with information about a Convention of States and recruit them to help the cause. If I, as the national grassroots director, hear about an event in your state where COS should be represented, you will be my first point of reference. We will either ask you to represent us at the event, or find another qualified speaker in your state to do so. You can also invite your volunteer team from that area to attend the event through the Action Center. In addition, please **research statewide speaking opportunities** where COS should be represented. *All large speaking engagements and events must be approved by your National Grassroots Director.*

Report weekly progress-

You are at the head of your leadership chain in your state. All other volunteer leaders in the state will be responsible to you. As such, you will have the best read on what's going on in your state. As the national director for our grassroots operation, I want to know what progress you are making, as well as any difficulties you've faced. That said, we have created a weekly report form for you to fill out and return to me. You can type directly into the document and send it as an attachment. Please coordinate with your Legislative Liaison, Coalitions Director, and District Captains to complete this form. I'm here as a resource for you, so feel free to contact me if you have any questions.

3. The Action Center

The Action Center is our main database for organizing and communicating with the grassroots teams within each state. As the State Director, you will be able to view every person signed up in your state. These lists can be accessed through the "Leaders" tab on the menu on the left side of the main page. On this page, there are four links to lists:

- Applicants
- Leaders I Manage
- My Members
- My Lobbying

The *Applicants* list is where you will find new applications for the District Captain, Legislative Liaison, and Coalitions Director positions. Through this link you will be able to view their

application and contact information, and change their status from pending to active.

On the *Leaders I Manage* page you will see a list all of your appointed District Captains as well as your Legislative Liaison and Coalitions Director. From here, you can message an individual leader or this entire list with just a few clicks. You can see this option near the top left of the page.

The *My Members* page is very similar to the Leaders page in that you can see all of the volunteers signed up in your state. Your leaders are also included in this list. Again, you can message an individual, a select few, or all of these members from this page. The search function on this page allows you to break the list down to a specific district or city.

The *My Lobbying* page allows you to track your state legislator's opinions on the project. In this tool, critical information about your contact activities can be edited and logged.

More details on these functions and others available on the Action Center can be found in the [Overview for Leaders](#) document. If you have questions, please first consult this document, then get in touch with me if you need further clarification.

4. Frequent Questions

How do I contact people in my state?

The Action Center messaging system allows you to contact everyone within your state. You can do this by going to your members page. From here you can message an individual or a group of members.

We will ask you to reach out to your members in this way during the legislative session. When that time comes we will provide specific messages regarding the action your legislation is taking. You are responsible for alerting your state to upcoming legislative hearings, committee votes, and progress being made. These updates will be a joint effort between you, your Legislative Liaison, and me here at the National office. This will be discussed more as the legislative session approaches.

Additionally, we have created an official email address for your Convention of States communications. This email address will be a forwarding address and linked to the personal email you used in your application. Any messages sent to your selfgovern.com account will come to your personal account inbox. Each email provider is different, but there is a way to modify your settings to allow sent emails to come from your selfgovern.com account.

Your email will be *director.{your state abbreviation}@selfgovern.com*. Example: director.mn@selfgovern.com. This email will be on your business cards.

What about making flyers, business cards, etc?

We provide all of our state leaders and district captains with our all-inclusive palm cards. You may use the official Print Request form attached to your appointing email to request palm cards

for specific events or needs. All of your district captain's requests for palm cards will come through you. These processes are detailed in the Print Policy sent in your appointing email.

We encourage our leaders and volunteers to be creative in their recruitment and education efforts beyond what we provide, including designing graphics, presentation, flyers, etc to get out the word. We do ask that you send us a sample of materials you will be distributing for approval before doing so. Since we are operating across the entire country, we want to ensure that our messaging stays consistent, and most importantly, accurate. Email your materials to our Communications Director, Jordan Sillars (jordansillars@selfgovern.com), for approval.

All of our state level leaders will receive official COS business cards a few weeks after they have been appointed. Please let me know when you are getting close to the end of your supply and we will reorder them for you.

Your official appointing email includes the official letterhead to use for COS related emails and letters.

What about creating social media like Facebook or Twitter?

If you wish, you can create an official COS Facebook page for their state. State directors are the only volunteers authorized to do this, unless otherwise specified. While we encourage leaders to communicate with volunteers through the Action Center, we recognize that Facebook is a powerful tool for recruiting more members and spreading the word about COS. Please see the COS Facebook policy in Appendix A for details on how to set up a State Facebook page.

Additionally, you may either use your own twitter account or create a COS state twitter account to promote the project and recruit leaders and volunteers in your state. Please refer to the Twittering Guidelines in Appendix B.

Who should contact the State Legislators?

Anyone can contact representatives to voice their support. We certainly encourage this and would instruct people to include a copy of our model Application for States for a convention (located under the *Citizen's Toolkit* on our homepage). At times, however, we will want to create a coordinated effort to have volunteers contact their State Representatives. For example, when a bill is introduced on the floor, we will be mobilizing a cohesive movement of volunteers to call their reps and say "vote yes for this bill". We also want to highly encourage volunteers to show up in-person for any legislative hearings to show support for the bill. Your Legislative Liaison will know when those bills are going to be introduced, will be meeting with legislators face to face, and coordinating with you and District Captains to make sure the volunteers are coordinated.

What should I do if another organization wants to join efforts with COS?

Groups like this should be put in contact with your State Coalitions Director. COS recognizes that there a lot of organizations out there who are passionate about this process. While we would certainly welcome any support and promotion they would give us, we will not compromise our

goal – calling a Convention of States to limit the power and jurisdiction of the federal government. Organizations that would support us could expect recognition as a Friend of COS. Any official communications should be approved by the National office to confirm the messaging is consistent.

What should I do first?

The first thing you should do is get in touch with the rest of your state's leadership team. If you don't know who else is on the team, contact me and I will point you in the right direction. Next, introduce yourself to your District Captains and then all of your volunteers on the Action Center. Once you are familiar with your team, begin building your District Captains and grassroots volunteers!

5. State Direct Payment Policy

As you all are aware, state events are a very important tool to increase the Convention of States momentum in your state. But these events are also expensive. We would like to help lift some of those expenses from your shoulders.

Attached you will find our Direct Payment Policy, as well as our Payment Request form. You will notice that the National office is only able to pay for events in advance, as we are unable to reimburse you for any expense. The unfortunate truth about this is that if we were to reimburse our state volunteers we would violate lobbying laws on both the legislative and grassroots level.

Please use the policy and structure we have put in place when submitting your direct payment request. This is essential for the COS office as we attempt to manage each state's events in a smooth and efficient manner. Also, understand that not all direct payment requests will be approved. The budget for this policy is not unlimited, therefore, we will approve requests based on the strategic location of the state, the cost of the event, the event attendees, and so on. But, please, do not let this stop you from sending in your request and shooting me an email or giving me a call to explain your request. Our goal is to build grassroots teams all across the country and we want to fund as much of that as we possibly can.

As stated in the policy, District Captain requests must go through the state director. You are the gatekeeper of District Captain expenses. I need to know that you are aware of and approve of District Captain requests. Coalitions Directors and Legislative Liaisons can submit their own requests, but you need to work as a team to discuss, plan, and coordinate these types of events.

We hope this new policy will enable you as state leaders to have the freedom to build your state presence, without a financial constraint to hold you back.

6. Appendix A: COS Facebook Guidelines and Instructions

If they wish, state directors can create an official COS Facebook page for their state. State directors are the only volunteers authorized to do this, unless otherwise specified. While we encourage leaders to communicate with volunteers through the Action Center, we recognize that Facebook is a powerful tool for recruiting more members and spreading the word about COS.

We do ask, however, that you encourage members of your state’s Facebook page to also Like the national COS Facebook page. This will allow folks to see the full, countrywide force of our movement. An organization with 300,000 Likes is much more impressive than one with 20,000 Likes. We want to show the nation we are a force to be reckoned with, and one way to do that is to garner as many Likes on the national page as possible.

How to Create an Official COS State Facebook Page

1. Log on to www.facebook.com and create your own Facebook profile.
2. From your homepage, go to the **Pages** section on your sidebar and click on **Pages**.
3. Click **Create a Page**.
4. Now on “Create a Page” (<https://www.facebook.com/pages/create/>), select the “Company, Organization or Institution” option.
5. In the scroll down menu, select “political organization.” Enter the company name as “**Convention of States [Your State]**.” (E.g., “Convention of States Alabama.”)
6. You will now be taken to the “Set Up Convention of States Alabama” page.
7. In **1 About**, add the following description to your state’s page:
 - a. **This is the official COS [your state] Facebook page! Also check the national page at Facebook.com/conventionofstates.**
 - b. List “website” as www.conventionofstates.com
 - c. To customize your Facebook page link, please follow this model: “**cos[yourstate]**.” (E.g., “cosalabama”) Thus, making your link: <http://www.facebook.com/cosalabama>
 - d. Click “yes” to the following questions:
 - i. Is Convention of States Alabama a real organization, school or government?
 - ii. Will Convention of States Alabama be the authorized and official representation of this organization, school or government on Facebook?
 - e. Click “save info.”
8. You will now be prompted to upload a profile picture. Please use the official logo created for your state. If you haven’t already received this logo, please contact jordansillars@selfgovern.com. Once finished uploading, click “save photo.”
9. You will now be given the option to add this group to your favorites. Feel free to do so as you desire.
10. You will be given an option to advertise your Facebook page. You may use Facebook advertising if your state has available funds for such activity. If not, click “skip”.
11. Welcome to your new Facebook page! To finish the look of your page, upload your state’s official cover photo by clicking on the “Add a Cover” button.
12. There are a number of other settings you can choose. You’re free to decide what works best, though we suggest only allowing admins to post (**only allow state leadership or district captains to be admins**). To make a member an administrator, click on the “Edit Page” tab on the top right side of the page. Then click “Edit Settings.” From this page, click the “Admin Roles” tab.
13. **Add at least one of the following national COS staff members as an administrator:** Jordan Sillars, Laura Fennig, or Sophie Linde.
14. Remember: you’re responsible for your page’s Facebook wall. Remove any offensive or off-topic posts and, if the member persists, ban the member from the page.

15. Start inviting your friends, and make sure to invite all of the COS leadership in your state!

Posting Guidelines

1. **Be professional.** The purpose of this group is to provide an avenue for official COS communication. This is not the place for...
 - a. **Rants.** Political or otherwise. It makes you sound crazy. No one wants to follow a crazy person.
 - b. **Cartoons/statuses/pictures that may be considered offensive to any political party.** Our message is simple—the federal government is too big and too powerful, and a COS offers a solution. Our message is *not*, “Liberals are crazy” or “Conservatives are stupid.” The other members of your group do not necessarily share your views. At some point, we’ll need the help of all sorts of people, from both sides of the aisle. Don’t alienate anyone.
 - c. **Obama-bashing.** We don’t like his policies, but that doesn’t give us license for ad hominem attacks. If you want to critique his policies, frame them as critiques of the federal government. He’s the President and deserves our respect. Plus, this attitude will separate us from other political groups and give us more credibility (i.e., we’re not just another crazy, ultra-conservative political organization). This isn’t cowardly; it’s strategic.
 - d. **Conspiracy theories/alarmism.** Obama is a U.S. citizen, the atrocities of 9/11 were perpetrated by Islamic terrorists, and no one is taking up arms against the government.
 - e. **Profanity or crude language.** Like your momma said, “No cussin’.” Honestly, we shouldn’t even have to say this. Remember: **be professional.**
 - f. **Statements of any kind that could be interpreted as racist or sexist.**
 - g. **Campaigning.** As a non-partisan organization, please do not post campaign materials for any politician, or candidate. All posts regarding politicians or political parties should be framed in light of their support of a COS.
2. Please remember that anything you say will be viewed as an official statement from the COS Project. You are no longer simply stating your personal opinions. As an administrator of an Official COS Page, you should assume that the media will be scouring your page for anything with a shade of questionability to critique. With that in mind, please use your words carefully and strategically.

As the administrator of the group, it’s your responsibility both to follow these guidelines and to enforce them. If you do not, we’ll remove your administrator privileges and possibly your status as a leader in this Project.

7. Appendix B: COS Twittering Guidelines

Twitter is a great way to share good articles and get the latest news to your followers. Here are some guidelines for making your tweets sing.

1. **Tweets should be professional.** You're the official spokesperson for the COS Project in your state. So...
 - a. Don't engage in alarmism or promote conspiracy theories.
 - b. Keep your tweets at least semi-grammatically correct.
 - c. No ranting against the federal government (or any government, really).
 - d. No vulgar language or personal attacks against other Twitter users.
 - e. AVOID ALL CAPS IT MAKES IT SEEM LIKE YOU'RE SHOUTING AND A LITTLE CRAZY.
2. **Tweets should be informative and/or helpful.** This sounds like a no-brainer, but you'd be surprised how many tweets are nothing more than a person's train of thought. Do things like...
 - a. Include a link in your tweets.
 - b. Attach a picture.
 - c. Quote a Founding Father or other famous personage.
 - d. Report on the COS news in your state.

Tweets should give people something to do or something to read or something to think about.

3. **Tweets should be interestingly written.** Try to go for something snappy, something that will catch people's attention. For example, instead of saying, "The COS Project can make a difference for future generations," say, "Change who decides—support the COS Project and preserve liberty for generations to come."
4. **No Obama-bashing.** If you want to criticize Obama, frame it as a criticism of the federal government. Again, avoid ranting. We're going for reasoned, logical criticism.
5. **Don't alienate people.** Even if you very strongly support one political party, don't bash the other side. At some point, we'll need the help of people from both sides of the aisle. We don't want to burn our bridges.
6. **Engage with your followers.** People like to feel acknowledged. If someone asks you a question on Twitter, respond to them. If someone posts a good, pro-COS article, thank them. If someone voices their support, tell them they're appreciated. Engagement is one of the best ways to gain followers.
7. **Tweet often.** You can't really tweet too much (as long as all your tweets are interesting). Three to four times a day is optimal, though we understand if this is too difficult.
8. **Use Hootsuite.** Hootsuite allows you to schedule your tweets and shorten you links. It's great.

8. Appendix C: COS Direct Payment Policy

Convention of States Project will cover the cost for events and lodging based on approval and our ability to pay in advance. 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 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.