



HOW TO DO A STUDY

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DEFINITIONS

Study is the process of formally investigating a statement or position, its supporting or contravening facts, and its policy implications. In League, study can take place at the local, state or national level, and is usually designed to provide the League with a basis for future political action.

Arriving At A Position

1. **Consensus** is an agreement among a substantial number of members, reached after study and group discussion at face-to-face meetings called unit meetings.

In the consensus process, it is **NOT** initially the job of the study committee to produce a statement with which your membership is asked to agree or disagree. Rather, the study committee, with board approval, must first frame questions to guide your League members' discussion, provide background materials and a presentation outline, and distribute all of these to your members prior to a consensus meeting.

If your League comes to agreement at or after the meeting, the consensus statement must be based on the points brought out during the discussion — the position statement emerges from the give-and-take of group interaction and exchange of views.

2. **Concurrence** is the act of agreeing – or concurring – with a previously formulated statement from another local or state League that has studied the issue and reached members consensus.

Leagues may concur with a statement or position arrived at by another League, a position stated by a study committee based on its research or reflecting widely-held views, or a position of long standing that they wish to reaffirm.

In preparing for Concurrence, your committee and board approve the statement before it is sent to your members for consideration; the study committee presents the statement and background material. The statement must be judged exactly as it is written and may not be amplified or made subject to conditions.

3. From your members' viewpoint, the simplest distinction between the consensus and concurrence positions is that in reaching concurrence they discuss and vote on a statement; in reaching consensus they discuss and vote on a question or questions. Ideally, both require a thorough examination of all facets of the issue by a committee and then by your League's members. In either circumstance, Board approval is needed before the position is adopted by the entire membership.

ADOPTING and CONDUCTING A LEAGUE STUDY

SOME THINGS TO CONSIDER BEFOREHAND

A study may be proposed by your League's members at your Program Planning and/or Annual Meeting or by suggestions to your board by League members or even by another organization. Studies are usually adopted by the membership at an Annual Meeting or Program Planning meeting; check your bylaws for your Program adoption procedures, as local Leagues have a great deal of autonomy in this process.

The board should ask the proponents to define the proposed:

- Type of study (consensus or concurrence)
- Scope of the study
- Timeline and presentation method(s)
- Method(s) of adoption

In deciding whether to accept or reject proposals for new studies, your board should consider the following criteria:

- Is the issue relevant, timely, and appropriate to the local level?
- Does it require governmental action?
- Can the League be effective on the issue?
- Are there member interest and/or potential for a strong coalition?
- Are there opportunities for education and later action?

Do not duplicate past studies unless an update is required. If the issue is already covered by a current local, state, or national position, your League can consider an action approach.

In all studies, member participation is key. It is inadvisable to form a new position based on a small number of members participating. It is up to your board, not the study committee, to determine not only whether agreement has been reached but also whether a sufficient number of members have participated. The LWVNM recommends that your board decide what will constitute sufficient participation before the study starts: 10%? 25%? A majority vote at a general meeting at which a quorum is present? This decision should be communicated to your membership at the start of the study.

PROGRAM PLANNING: ADOPTING A STUDY

Depending on your bylaws, your League a decision to do a study may be made at a general meeting, an Annual Meeting, a Program Planning meeting, or via an electronic vote. Although you may be able to submit program ideas to your members via e-mail, your newsletter, or telephone calls to the membership, in the absence of a meeting it will be difficult to assess if there is a strong interest in the study topic(s) and whether there are enough members who would like to participate in the study or studies.

Check your bylaws for Program adoption criteria specific to your League.

The following background materials are useful when considering program or study suggestions:

- LWVUS *Impact on Issues*
- LWVNM Position Statements
- Local League positions
- Local bylaws
- Articles that explore an issue of interest

Suggestions for Program Planning meetings:

- Explain the Program Planning process to your members.
- Review the considerations that apply in choosing Program (see, e.g., page 3).
- Have your League president or program chair lead the discussion.
- Provide visual aids (e.g., blackboard or easel with flip chart) if helpful.
- Make sure attendees have an understanding of the rules and an opportunity to participate fully.

If your League asks for study proposals to be submitted in advance of the Program Planning meeting, your board has the option to reject some or all of the study recommendations (e.g., for not enough resources, for lack of interest, etc.); in such instances, these recommendations should be presented to your membership as non-recommended items. If more than one study is proposed at your Program Planning meeting, you should ask your members to prioritize the proposed Program.

CONDUCTING A STUDY

A study is a priority for any League that undertakes one, and, unless your League is very large, it is probably not a good idea to do more than one local study at a time. Studies need total board support. They can energize members and have the potential to enhance membership recruitment, visibility and community support. They can also alienate potential members and members of the community. Please do any study carefully and thoroughly.

MEMBER INVOLVEMENT

The study committee should involve your League's members at all possible stages throughout the study process. In order to bring your members up to speed on the study issue, your committee may want to try the following:

- Invite a speaker or panel to a general meeting.
- Create a multi-media presentation and have a viewing of slides, movies or videos that look at the issue.
- Invite members to accompany the study committee on a "go-see" tour.
- Write bulletin/newsletter articles based on the committee's research.

THE COMMITTEE

Committee Responsibilities and Membership

The Study Committee is required to:

- Propose the scope of the study and create a timeline for the study.
- Organize and conduct the study: job assignments, research, information dissemination, member meetings, consensus questions or concurrence statement(s), presentation, final report and recommended position statement.
- Provide articles and resource information to your bulletin/newsletter editor and/or public relations director.
- Examine all sides of the issue.

The size of the study committee depends on the focus and scope of the study. It is helpful for the committee to divide the work into smaller job assignments such as investigating a particular aspect of the study, clipping articles on the topic, participating in one or more interviews, etc.

The recruitment of committee members is the joint responsibility of the board and the study chair. Look for members who are knowledgeable and/or have an interest in the issue and who have a range of opinions on it. Write an article in your bulletin/newsletter on the topic, and appeal for volunteers. Contact potential study committee members personally to make them feel needed. Inform them of the requirements of being on the committee.

The Study Chair

At the time your League adopts a study, it should elect the study chair. It is vital that the person who directs the study maintains balance.

Your study chair should:

- Have strong organizational skills to lead the study process through planning, research, consensus preparation and presentation. The chair should always have an outline of the committee's responsibilities, set the agenda for its meetings, and encourage members to finish their tasks, keep files, and write reports on time.
- Chair study committee meetings.
- Maintain files with resource information, correspondence, articles, etc.
- Be able to work well with a variety of people.
- Recruit diverse study committee members.
- Communicate with board members.
- Coordinate the details of study with the board. Some Leagues appoint the study chair to the board. This provides an opportunity for the board to be current on the progress of the study, make suggestions for keeping the members updated, and prepare for approval of the consensus questions or concurrence statement(s).

SETTING A TIMELINE

The study proponent, study committee, or study committee chair should set an initial timeline for the study, including a deadline for its completion. Your League's board and membership can help set the timeline and deadline, but at the very least should approve whatever deadline is set.

It is easiest to work backwards from the chosen reporting deadline. Include time for research, interviews, informational meetings, and committee meetings.

The study committee should clearly define the plans and tasks of the committee, including completion deadlines, at its first meeting.

RESEARCH

The two basic sources of information for your study are published materials and field research. Avoid duplication of effort whenever possible. If some other League or group has gathered extensive information, ask if you can use it as part of your research.

Published Materials

Some sources include:

- Current laws, ordinances and codes applicable locally
- Print and on-line publications by Leagues, other organizations or agencies
- Books, newspapers and periodicals
- Studies by other local Leagues
- Budgets and minutes from appropriate government departments and/or agencies
- Pamphlets, bibliographies and fact sheets from conferences or forums on the issue

Field Research

Options include:

- Questionnaires, polls, and surveys. Be careful to keep them objective and perform an unbiased analysis when they are completed
- Interviews with individuals knowledgeable about or experienced with the issue
- Invitations to experts to come and speak to the committee and/or to your League
- Tours of appropriate sites or facilities

Interviews

Before an Interview:

- **Know your purpose** (what information you seek and why you want to talk to this person).
- **Make the appointment**, identify yourself as a League member and state your purpose for meeting.
- **Prepare** ahead of time for the interview; have appropriate, organized questions.
- **Confirm the appointment** the day before.

Some Specific Dos and Don'ts for Interviews:

- **Begin the interview.** Be sure you know the interviewee's name and how to pronounce it. Get the interview started as soon as you can. If asked how long it will take, don't misrepresent, but avoid being too specific, for the length of time does vary.
- **Explain about the League and the study you are undertaking.** Either at the beginning of interview or in your letter asking for an appointment give a **brief** explanation of the League and its study. A fact-finding interview generally takes place before the League has taken a position on the issue involved. Make it clear that you are trying to gather facts in as objective a fashion as possible and explain how the facts will be used.
- **If the material is to be published**, explain for whom and in what form. If you want to quote the interviewee or cite him or her as an authority, ask permission and check back after the material is written up to be sure it is correct.
- **Give the interviewee a chance to be frank** by trying to arrange the interview away from his or her colleagues. This is especially good if you plan to interview others from the same office later.
- **Good interviewing relations** exist when the interviewee feels relaxed and at ease with the interviewer and feels free to say what he or she **really** thinks or feels about a given subject, without fear of criticism or disapproval.
- **Be friendly and informal but objective.** Be a sympathetic, interested, and attentive listener. Be **respectful** and never indicate that you think you know more about the subject than he or she does.

- **Be neutral. Do not argue.** Your job is to understand and convey to the interviewee that you understand and accept what he or she is saying, not to approve or disapprove of it, nor to agree or disagree with it. Remember that you represent the League in the interviewee's eyes and do not lead him or her to believe that the League supports something that it does not.
- **Be observant.** Watch the interviewee's manner of expression and gestures. These signs may serve as cues that the interviewee is becoming ill at ease or not expressing what he or she really feels. Last but not least, **be at ease yourself.** If you feel hurried or hesitant, the interviewee will sense this feeling.
- **If there are discrepancies between answers to questions of fact,** note contradictions and probe tactfully to see whether you can clear up the apparent discrepancies. It may be that you have not quite understood.
- **Don't allow the discussion to digress.** Avoid bringing up subjects not specified for the interview.
- **If you have a questionnaire, be thoroughly familiar with it** so that you can read each question without hesitation or stumbling. If you hesitate or emphasize one word more than another, you can change the meaning of a question.
- **If you have a questionnaire, ask every question.** You may feel that you already have the answer to a question in the answer to a previous question. But it is not usually safe to assume that you have a complete answer unless you ask every question on the questionnaire.

After the Interview

Write up the interview immediately. When you are planning your time to do the interview, allow time immediately afterwards to write it up. Try not to schedule two interviews without write-up time in-between or you may forget "who said what."

Write a note of thanks afterwards, include a summary of the interview and ask the interviewee to check it for accuracy. If the material is to be published, let the interviewee see and check sections where he or she is quoted. When the study is published, it is good public relations to send the interviewee a copy.

COMMUNITY INVOLVEMENT

Some Leagues are interested in recruiting study committee members from the community, hoping they will become members. This should be decided by your board, not by the study committee or chair.

You can submit newspaper articles to accompany a public meeting or tour.

Non-members can be present at consensus or concurrence meetings but cannot participate in the vote.

Your League may gather enough information to publish a fact sheet or pamphlet for the community.

COMING TO CONSENSUS

CONSENSUS STEP BY STEP

The consensus process is a cooperative effort between your League board and your study committee. It is the board's responsibility to monitor the process to ensure that your members are able to come to consensus in an unbiased and nonpartisan atmosphere. It is the study committee's responsibility to maintain an unbiased approach to the facts.

If your League still uses a traditional model of the study process, you will hold your Program Planning meeting at least a month before your Annual Meeting, and submit information to your members well in advance of their Annual Meeting vote. However, many local Leagues (and the LWVNM) combine their Program Planning and Annual Meetings, and a few hold their Program Planning meeting **after** their board is elected at their Annual Meeting.

Whichever method your League follows, the following steps must be completed before the study starts:

- Someone decides and writes down the Focus and Scope of the study.
- The League board chooses the recommended program items for the Annual Meeting. Members choose an issue to study.

Once these steps have been completed:

- The board and the study chair recruit members for the study committee.
- The committee and board decide how to present the issue for a membership vote: a general or separate unit meeting(s), e-mail, a bulletin article with a tear-off for individual responses, or a combination of any or all three. The board decides what constitutes sufficient participation.
- The study committee sets the timeline, organizes and gathers research information, shares issue information with the members, and sets the date of and prepares for the consensus meeting.
- The study committee tells your members about the issue through articles in your bulletin, information forums, tours, etc., before the consensus meeting.
- The study committee writes the consensus questions and the board approves the questions, which are sent to the members at least two weeks before the consensus meeting.
- The study chair and committee develop a discussion outline and a presentation format.
- The study committee presents the highlights of its issue research at the consensus meeting. The discussion leader oversees the consensus meeting to ensure there is constructive consensus discussion using the consensus questions. The recorder keeps accurate notes of the consensus meeting discussion.
- The study committee, discussion leader and the recorder hold a wrap-up meeting to formulate the position statement using the consensus reached by the members.
- The board decides if consensus was reached by the members at the consensus meeting, reviews and approves the position statement, and adopts the position.
- The board may take action on the position immediately after it is adopted as a new local position.

- The members reaffirm all local positions at each Annual Meeting.

THE FOCUS AND SCOPE OF ANY PROPOSED CONSENSUS STUDY

FOCUS is the statement of the main topic for study. Simplicity is key in wording a local study item.

The intent should be clearly stated with concise and direct wording.

EXAMPLE: A study of housing alternatives for the elderly

NOT: A study of housing

Wording should be general enough to allow flexibility as the study proceeds.

EXAMPLE: A study of combining elementary school A with school B

NOT: A study to determine if there is sufficient space and teachers in Elementary school A for current and future students or if it should be combined with school B or if a new school should be built

Avoid implied conclusions and negative wording.

EXAMPLE: A study of the structure of town government

NOT: A study of the ineffectiveness and lack of coordination in the current form of town government

Wording may reflect a broad study or may be limited to a particular aspect of an issue.

EXAMPLE: A study of services provided to the elderly

EXAMPLE: A study of the town manager form of government

SCOPE explains the extent and limits of the study, the areas that the League wants to explore and, sometimes, the emphasis on a particular aspect of the study. The scope is not a list of planned activities or meetings.

EXAMPLE:

FOCUS: A study of utilities in town

SCOPE: A study of the administration, cost and availability of utilities in town, in particular the public water system

Once the board approves the final wording of the Focus and Scope, it becomes a “recommended” study item. It may be amended by the members at the Annual (or Program Planning) Meeting.

CONSENSUS QUESTIONS

One of the key factors to making consensus discussions go smoothly is well-written consensus questions. It is important that the questions have the following traits:

- Use short and simple questions. Non-experts should be able to answer them. Use easy-to-understand language and avoid technical vocabulary.
- Keep the questions within the range of the Focus and Scope of the study. If necessary, prioritize the items.
- Keep questions unbiased and clear.
- Keep questions open-ended to expand discussion: no multiple choices, “True or False” or “Yes or No” questions.
- Do not have too many questions.
- Keep track of time available for questions after the study committee’s presentation. The consensus meeting should not drag on too long.

The consensus questions should not be **narrow and restricting** because it is difficult to predict exactly what opportunities for action will present themselves.

THE CONSENSUS MEETING

The meeting consists of a presentation by the study committee with member discussion and formulation of responses to the consensus questions. The intent is to elicit agreement, whether pro or con, on **broad general concepts**.

If your bylaws permit, you may adopt a new or reworded position at your Annual Meeting when circumstances require a quicker turn-around. The same standard of research and background material is required; approval by the board and notification of membership also apply.

Presentation

The study committee compiles and edits the collected data into a balanced and objective presentation, with equal emphasis on all sides and viewpoints concerning the issue.

Study information should be shared with the membership before the consensus meeting. Too much information handed out at the consensus meeting can cause confusion and interrupt the flow of the consensus discussion. Use visual aids, such as graphs, charts, maps, etc., to keep the presentation stimulating.

Schedule a briefing meeting as a rehearsal for the study committee’s presentation. This provides the committee an opportunity to refine its presentation, both for technique and for selection of the most relevant information for presentation to the consensus meeting. The discussion leader and recorder should be present; this is an excellent time for them to familiarize themselves with the issue and the consensus questions.

The Discussion Leader

It is essential to have a good discussion leader for the consensus meeting. The result of the consensus discussion depends not only on the study committee's contribution but the effectiveness of the discussion leader. The discussion leader may, but need not, be your League president; the leader may, but need not, be the study committee chair.

Key points for the discussion leader to keep in mind are:

- Remind those present that only League members can vote.
- Establish an atmosphere where the members feel comfortable expressing even unpopular views.
- Guide the group through discussion without argument or debate. Do not let an individual dominate the conversation.
- Utilize inclusive language, for example, "We have heard from Mary, now does anyone disagree or have anything to add? What do you think, Jane?"
- Listen carefully to discern member agreement. Summarize tentative areas of agreement for clarification: "What I hear you saying is that you are willing to support a new school building if there is money available? Am I correct?"
- Keep the group focused on the consensus questions: "That is an interesting anecdote; we seem to have covered this point and should move on to the next question."
- Be perceptive. Watch for any obstacles to discussion, where more information is needed, if the discussion is becoming bogged down, or when there is no consensus on a particular point: "We seem to have come to an impasse; the discussion does not seem to be swaying anyone. There is no consensus on this point, let's move on."

The briefing meeting will help the discussion leader become familiar with the issues, clarify any of the consensus questions, and give the committee members the discussion outline for the consensus meeting.

If there is to be more than one consensus meeting, it is very useful to have the same discussion leader for each meeting. This will help the consensus be more integrated and valid.

The discussion leader should be present at the wrap-up meeting to help the study committee write the consensus statement.

The Recorder

The recorder is another key person for the consensus meeting. His or her notes will be vital for the study committee to use in writing the consensus statement, and useful for the board in deciding whether or not your members have arrived at a consensus. The recorder may, but need not, be your League secretary. If possible, he or she should also attend the briefing and wrap-up meetings.

The recorder should note the following:

- The number of participants
- Responses to the consensus questions
- Areas of agreement and disagreement

- Minority views and their strength
- Areas about which the group was undecided or needed more information

The recorder can be asked to review his or her notes for the group at the end of any meeting. There may be points that the recorder wishes to clarify, and the group should cooperate in doing so.

The Consensus Discussion

There are some guidelines to use to have a constructive consensus discussion which will lead to a strong consensus, i.e., one with areas of substantial member agreement:

- The members need to be reminded that they are being asked to voice their opinions as citizens, not as experts.
- A consensus does not imply that the area of agreement is in favor of something; a consensus can be in opposition to something.
- Although members do not have to have unanimous agreement, the presence of a sizable dissenting minority means there is no consensus.
- The group can reach a partial consensus on certain aspects of an issue.
- The group can also come to the conclusion that there is “no opinion” because of insufficient information, internal contradictions within the information, etc.
- There should be full discussion of the areas of disagreement so that the participants feel satisfied that all viewpoints have been heard.

Pitfalls to watch out for include:

- Study committee members may be perceived by League members as the “experts” and their opinions may become overly influential. This should not disenfranchise the committee; committee members should participate in the discussion to provide information, clarify discussion points, and describe the consequences of different decisions. However, they should refrain from telling the other League members how to vote.
- It may be difficult for League members to separate facts from opinions when stated by study committee members during discussion. Committee members should be clear in stating which is which.
- If there is more than one consensus meeting, the committee’s participation should be as close as possible to identical at each meeting; unequal participation may skew the consensus.

CONSENSUS PARTICIPATION BY THOSE NOT ATTENDING THE DISCUSSION MEETING

Your board should decide if your League will allow separate consensus participation outside of the consensus meeting. There are several reasons to consider this option, including wider membership involvement. However, there is a downside: members who missed the meeting may be less well-informed than attendees, and their votes could outweigh the consensus of the attendee members, leading your League to a badly-informed decision.

ADOPTING A POSITION STATEMENT

The Wrap-Up Meeting

The purpose of the wrap-up meeting (which should include the study committee members, the discussion leader and the recorder) is to enable the study committee to prepare a consensus report and formulate a position statement. This meeting should occur as soon as possible after the consensus meeting.

The consensus report is designed to be a tool for the board to use when updating the position, sharing with other Leagues and taking action. The consensus report should include:

- Important research (the study file)
- A short description of the consensus meeting
- Presentation of pertinent information
- A discussion of the consensus questions
- A summary of the meeting and of the consensus if one was reached. This is the place to **include minority views**, because those views are not written into the position statement.

The position statement should articulate the broad areas of substantial agreement that emerged from the members at the consensus meeting. The actual formulation of the position is an interpretive process, qualitative as well as quantitative, and should consider the full range of discussion.

In order to have the study properly result in advocacy action, the position statement needs to reflect what your level of government can do. The position statement should be broad enough to allow the League to initiate, support or oppose a **variety of proposals over a period of time**.

The following example of wording for a position statement comes from *LWVUS Committee Guide: Planning Program from Choice through Action*.

“Following the study of libraries, members have agreed that:

- a new building is needed in a central location;
- services - either small neighborhood branches or book mobiles - are needed to bring books to areas too far away from the central library;
- there should be better cooperation between the library and the school, the jail, the hospitals and other institutions; and
- the book collection should be increased.”

The brief position:

“Support of A New Central Library That Provides For Expanded Services.”

The statement of position (including both the details and the rationale):

“The members of the LWV of Cityville believe that a new centrally located library building is needed in Cityville. In order to serve all the citizens, books must be available to all. Therefore, there should be small neighborhood branch facilities or bookmobiles so that access to library books and services is within walking distance of residents.

“The book collection should be expanded to meet at least the criteria established for a city the size of Cityville.

“In order to provide reading material for all people in Cityville, the library should arrange to lend books on an adequate basis to the schools, and to people homebound or in hospitals, jails and institutions so that no one able to read is denied access to books from the public library.”

Both the rationale — that the public library is for everyone and its books should be accessible to all — and some of the specifics are included. Yet the wording does not set the number of books, the specific places that branches or the main library should be, nor the exact methods of serving institutions. The board has room to maneuver, to act in support of, or opposition to, any specific proposals.

Board Approval

While the study committee presents the consensus report and the recommended position statement, it is your board that has the responsibility to determine if consensus exists. A substantial percentage of board members should therefore have attended the consensus meeting.

The board should keep in mind these considerations:

- The number of participants
- What the board members felt was said
- The strength of the majority and minority opinions
- Whether all points of view were discussed
- Undecided areas
- Whether all members were given an opportunity to participate

The board should not interject new ideas or opinions into the consensus position statement.

It is the board’s role to assure that the consensus reflects only what was stated at the consensus meeting or determined by the total consensus member agreement. The board needs to feel secure that the consensus position statement is truly representative of the members’ agreement, so it can act on the position with confidence.

If your board votes to approve the position statement, then it immediately becomes part of your League’s Program. Action can be taken from that point on.

The board may want to submit a press release that informs the public of the League’s new position. **The board should oversee any public announcements, press releases, and public testimony before government entities on the study to protect the League’s reputation for impartial analysis.**

STATE and NATIONAL STUDIES

SUBMITTING YOUR STUDY to the LWVNM: PROGRAM ADOPTION AT STATE CONVENTION or COUNCIL

Your League has successfully completed a study. Should you bring it to the other Leagues in the State?

Primary Considerations

If your study does not meet the following three tests, please reconsider.

Is it suitable?

Some local studies cry out for a wider hearing. If a local League decides to oppose the state's gun control laws, other Leagues might be interested in joining them in that opposition.

Do you have a study leader?

In general, the LWVNM prefers that the League or group of Leagues proposing a study also provide a study leader. The study leader does not have to be a member of the proposing League(s), but if he or she is from an outside League, you should at least know if he or she can run a meeting, make decisions, and get the committee to meet deadlines.

Can your study lead to state-level political action?

The purpose of League studies is not only to educate our members, but also to provide the LWVNM with a basis for political action. If your study has come up with a conclusion that doesn't point the way to legislation or administrative change, it isn't a good candidate for LWVNM consideration. Equally importantly, if your League is proposing a study without also proposing a "point person" who can lead the rest of New Mexico's Leagues in the event of a successful concurrence or consensus, *please* reconsider submitting it. A study with no Public Issues Team "specialist" to lead the charge afterwards may be a waste of time.

Procedures

To be considered for recommendation, local Leagues need to make written Program proposals to the LWVNM Board at least two months before Convention or Council. According to LWVNM Program Planning procedures, **only Program items submitted by the deadline can be considered.** The LWVNM usually solicits Program proposals in the Board Report.

The LWVNM Board then considers the recommendations and formulates a proposed Program, and submits it to the local Leagues at least one month before Convention or Council. The submission may contain both recommended and non-recommended items.