LEAGUE OF WOMEN VOTERS
OF THE FREDERICKSBURG AREA

POLICY HANDBOOK

Integrated Governance and Operating Policies

Status	*Effective*
Version	*1.0*
Adoption	*August 16 2026*
Effective	*September 01 2026*

Adoption and Version Control

Board Adoption.

The Board of Directors adopts this Policy Handbook as the integrated policy manual of the League of Women Voters of the Fredericksburg Area. The Handbook is subordinate to the League's bylaws, applicable law, and binding requirements of the League of Women Voters of Virginia and the League of Women Voters of the United States.

Integrated-Handbook Rule.

An amendment to any policy shall be adopted as a complete revised edition of the Handbook. Each adopted edition shall receive a new version number and shall identify the adoption date, effective date, superseded version, and principal changes.

Version	***Adopted***	***Effective***	***Supersedes***	***Summary***
0.1	Draft	Not effective	None	Initial comprehensive draft
0.2	Draft	Not effective	0.1	Draft for Board approval following member submitted edits.
1.0	Adopted	Effective	0.2	Adopted by Board

Secretary's certification after adoption:

I certify that this edition, Version 1.0 was adopted by the Board of Directors on August 16 2026.

Secretary: *Susanna Botts*

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ARTICLE 1

Governance, Authority, and Policy Administration

1.1 Purpose

This Handbook establishes durable operating rules for the League of Women Voters of the Fredericksburg Area ("LWVFRA" or "the League"). Its purpose is to protect the League and its participants, clarify authority, ensure continuity across changes in office, preserve institutional records, and provide consistent standards for governance, communication, program, finance, volunteer work, and public activity.

1.2 Governing Hierarchy

The League shall operate under the following hierarchy, in descending order of authority:

- Applicable federal, state, and local law.
- Binding requirements of the League of Women Voters of the United States and the League of Women Voters of Virginia.
- The bylaws of the League of Women Voters of the Fredericksburg Area.
- This Policy Handbook and other policies formally adopted by the Board as part of this Handbook.
- Board resolutions, approved committee charters, annual work plans, procedures, and written delegations.
- Informal customs and past practices.

When two authorities conflict, the higher authority controls. No past practice, oral instruction, committee custom, or individual preference may override the bylaws or this Handbook.

1.3 Scope

This Handbook applies to officers, directors, committee members, chairs, coordinators, student affiliate leaders, members acting on behalf of the League, interns, and nonmember volunteers to the extent relevant to their League work. Contractors, vendors, co-sponsors, and partner volunteers may be required to comply with applicable sections as a condition of participation.

1.4 Definitions

Appointed Leader: A non-Board chair, coordinator, liaison, project lead, or other person appointed or confirmed to perform League work.

Board: The Board of Directors established by the bylaws.

Candidate: A person who has publicly announced, filed, qualified, or is actively seeking nomination or election to public office.

Committee: A standing, special, project, study, budget, nominating, task-force, or working-group body authorized under the bylaws.

League Business: Work, discussion, decision-making, records, communications, finances, programs, events, or representation undertaken for or in the name of the League.

Official League Communication: A statement, digital post, letter, testimony, publication, email, graphic, event notice, or other communication issued in the League's name or through a League-controlled channel.

Partisan Entity: A political party, party committee, candidate committee, campaign, political action committee, or organization whose primary purpose includes supporting or opposing candidates or parties.

Nonpartisan Office: A public office for which the ballot does not identify candidates as party nominees or display party affiliation, regardless of whether a political party or partisan organization endorses a candidate.

Student Affiliate: A student organization recognized by the Board under the bylaws and operating subject to League principles and oversight.

Visible Leadership Role: A position whose public identity is closely associated with the League's neutrality, including Officers, Directors, Coordinator, official spokespersons, and any additional roles designated by the Board.

1.5 Board Authority and Collective Responsibility

The Board manages and supervises the business, affairs, and activities of the League subject to the bylaws and instructions of the membership at the Annual Meeting. Board authority is exercised collectively through properly authorized action. Individual Board members do not possess independent authority to bind the League merely by holding office.

Board members shall support lawful Board decisions after they are made while retaining the right to record dissent, seek reconsideration through proper procedure, and speak personally on matters that do not disclose confidential information or misrepresent League policy.

1.6 Board Principles and Annual Work Plan

Each newly seated Board may adopt a separate statement of Board Principles describing the sitting Board's nonbinding values, working philosophy, and priorities. Board Principles shall not amend the bylaws or this Handbook and shall expire when the next Board takes office unless readopted.

The Board should adopt or confirm an annual work plan within sixty days after July 1. The work plan shall identify major priorities, responsible leaders, target dates, capacity assumptions, and measures of progress. A work plan guides implementation but does not itself create authority to spend funds, take public action, or alter policy.

1.7 Governance and Portfolio Calendars

The President, Vice President, Secretary, Treasurer, directors, and required committees shall maintain an annual governance calendar in the official League system. The calendar shall include Board and membership meetings, the Annual Meeting, program deadlines, budget preparation, nominations, election milestones, required filings, insurance renewals, financial review, membership reporting, voter-service deadlines, and leadership-transition tasks.

Each officer and director shall maintain a portfolio calendar for recurring duties and provide it to a successor. The Secretary shall maintain the master governance calendar.

1.8 Policy Adoption, Amendment, and Versioning

This Handbook may be adopted or amended by majority vote of the Board at a meeting with quorum, unless the bylaws or applicable law require a greater threshold. Proposed changes should ordinarily be circulated at least seven days before the meeting at which they will be considered.

Every amendment shall result in adoption of a complete integrated edition. The Secretary shall preserve the prior edition, the adopted redline, the clean new edition, the motion and vote, and a change log. Superseded editions shall not be deleted or overwritten.

1.9 Interim Directives

When urgent circumstances require immediate operational direction between Board meetings, the President may issue a written interim directive within existing authority. An interim directive may clarify procedure, protect safety, preserve records, suspend delegated authority, or respond to a time-sensitive legal or reputational risk. It may not amend the bylaws, create a permanent policy, authorize unbudgeted spending outside existing delegation, or reverse a Board decision.

The directive shall be provided promptly to the Board and shall expire at the next regular Board meeting unless ratified, modified, or extended by the Board.

1.10 Public Availability

The current bylaws and current adopted Handbook shall be made reasonably available to members and the public. Superseded public editions should remain available in an archive when practical. Confidential procedures, security details, personnel records, incident files, legal advice, donor information, and other protected material may be maintained separately.

ARTICLE 2

Leadership, Committees, Nominations, and Succession

2.1 General Leadership Expectations

Every officer and director shall:

- Uphold the League's mission, nonpartisan policy, DEIA commitments, bylaws, and adopted policies.
- Treat Board service as both a governance responsibility and a working leadership responsibility.
- Attend and prepare for Board, membership, planning, and major League activities reasonably connected to the role.
- Lead within an assigned portfolio while building committees, volunteer teams, and reusable systems so that the role does not depend on one person.
- Provide timely reports on work, risks, opportunities, decisions needed, capacity limits, and next steps.
- Use official League systems for records, planning, communication, and project continuity.
- Protect confidential information, League property, account access, and the integrity of League decisions.
- Develop future leaders and leave complete transition materials.

2.2 Authority of Officers and Directors

Officers and directors have the duties stated in the bylaws, this Handbook, approved position descriptions, and Board assignments. They may make routine operational decisions within an approved budget, adopted work plan, established procedure, and written delegation. They shall seek Board approval when a proposed action would materially change policy, commit the League to a public position or partnership, create substantial financial or legal exposure, or exceed delegated authority.

2.3 Delegation and Supervision

The Board or President may delegate defined responsibilities to an officer, director, committee, chair, coordinator, member, or volunteer. Delegation shall identify the scope, reporting line, duration, spending authority if any, and conditions of the delegation. The person or body delegating authority remains responsible for reasonable supervision and may modify or withdraw the delegation.

2.4 Committees, Working Groups, and Coordinators

2.4.1 Types of Bodies

The League may use standing committees for continuing work, special or project committees for defined undertakings, study committees for position development, task forces and working groups for focused analysis, and appointed coordinators for operational support. The Board shall determine the appropriate form based on duration, authority, accountability, and the bylaws.

2.4.2 Standing Committee Leadership

A standing committee shall be chaired or co-chaired by an officer or director as required by the bylaws. An appointed coordinator may serve as managing vice-chair, committee manager, or operational lead under the elected chair. The elected chair remains responsible for Board reporting and compliance.

2.4.3 Special and Project Committee Leadership

A special or project committee may be chaired by any eligible voting member, including an appointed coordinator, when authorized under the bylaws. A special or project committee shall dissolve when its assignment is complete unless continued by Board action.

2.4.4 Committee Charters

Each continuing committee and each major project committee shall have a written charter stating:

- Purpose and connection to the League's mission or work plan.
- Whether the body is standing, special, project, study, advisory, or delegated.
- Chair, supervising officer or director, membership, and appointment method.
- Authority, limitations, budget, and approval requirements.
- Meeting and reporting expectations.
- Required records and archive location.
- Duration, review date, and dissolution condition.

2.4.5 Authority and Reporting

Committees and working groups are advisory unless the Board expressly delegates decision authority. No committee, chair, coordinator, or member may speak publicly for the League, commit funds, enter an agreement, use the League logo for a joint undertaking, or bind the League to a course of action without authorization.

Committees shall report to the Board as required by their charters and whenever a decision, risk, budget change, public statement, or material partnership requires Board attention.

2.4.6 Appointment and Removal

Committee and appointed-role vacancies shall be filled in the manner established by the bylaws, Board action, or the applicable charter. Appointed leaders and members serve at the pleasure of the Board or the appointing authority, subject to Board oversight, and may be removed or reassigned for nonperformance, policy violations, capacity limitations, conflict of interest, or organizational need.

2.5 Attendance, Capacity, and Accountability

Board members shall provide advance notice to the President and Secretary when they expect to miss a regular Board meeting. The bylaw consequence for three consecutive unexcused absences controls. An absence is excused when the President or Board accepts the reason or when circumstances reasonably prevented notice.

Leaders shall communicate early when capacity limits threaten deadlines or responsibilities. Requesting assistance, delegation, or adjustment is expected and shall not by itself be treated as failure. Repeated lack of communication or failure to perform essential responsibilities shall be addressed through a documented support and accountability process.

2.6 Succession and Leadership Development

Succession planning is a continuous Board responsibility. Officers, directors, and chairs shall identify potential leaders, create meaningful entry points, share knowledge, and avoid concentrating information or authority in one person.

No leader shall use seniority or control of information to discourage another member from seeking office, asking questions, or developing leadership experience.

2.7 Leadership Transition

Within fourteen days after a successor takes office or an appointed role changes, the outgoing leader shall transfer all League records, files, contacts, calendars, property, pending commitments, account access, and passwords through the official transition process. The outgoing leader shall provide a written transition memorandum identifying current work, deadlines, risks, unresolved decisions, partner relationships, and recommended next steps.

League accounts and materials belong to the League. No departing leader may retain exclusive control of a League account, remove or destroy records, or condition transfer on a personal dispute.

2.8 Nominating Committee Independence

The Nominating Committee shall operate independently from the Board in evaluating and recommending nominees. The President is not a member of the Committee and shall not attend its deliberative meetings. Board members and members may recommend candidates, provide factual information, and respond to requests, but shall not direct the slate.

The Committee shall begin work soon after the Annual Meeting, introduce itself to the membership, explain the offices to be filled, invite expressions of interest, and actively recruit throughout the year.

2.9 Open Nomination of Expiring Offices

Every office whose term expires at the upcoming Annual Meeting shall be treated as open for nomination and election. No incumbent possesses or controls the next term, and no office shall be advertised as filled merely because the current officeholder is willing to continue.

The current officeholder retains full authority and responsibility through the end of the current term and until a successor is elected or appointed and qualified as provided by the bylaws. The office is open for nomination; it is not vacant.

2.10 Incumbent Eligibility and Equal Consideration

An incumbent may seek another term and shall be considered on substantially the same procedural basis as other candidates. The incumbent shall affirmatively consent, provide the information requested of candidates, and be evaluated under the same published criteria. The Committee shall continue reasonable recruitment even when an incumbent seeks reelection.

Relevant prior service may be considered, including performance, attendance, teamwork, documentation, development of other leaders, compliance with policy, and the present needs of the League. Prior service does not create a presumption either for or against renomination.

2.11 Candidate Evaluation, Consent, and Confidentiality

The Nominating Committee should consider:

- Eligibility under the bylaws.
- Commitment to the League's purpose, nonpartisanship, and DEIA obligations.
- Understanding of the office and willingness to perform its working and governance duties.
- Capacity, reliability, judgment, collaborative ability, and communication.
- Conflicts of interest or partisan activity relevant to the proposed role.
- Skills, geographic representation, lived experience, and leadership-development needs of the Board as a whole.

No person shall be nominated without consent. Recruitment discussions, candidate questionnaires, references, and Committee deliberations are confidential. The final report and any information required for a fair election are official records.

2.12 Selection of the Nominating Committee Chair

The Annual Meeting should separately elect the Chair and two members of the Nominating Committee as required by the bylaws. Annual Meeting materials and the ballot shall clearly identify the nominee for Chair.

Should the position of Chair become vacant or otherwise be undesignated, the remaining members should recommend a Chair from among the Committee, and the Board shall formally appoint the recommended member as Chair for the remainder of the term. If the Committee does not provide a recommendation within ten business days after the lack of a Chair is discovered, the Board shall appoint a Chair from among the elected members after consulting them. The Board's role in this contingency is limited to making the Committee operational and does not permit interference with the slate.

2.13 Slate, Floor Nominations, and Internal Election Conduct

The Committee shall provide its report within the deadline established by the bylaws. Nominations from the floor remain permitted with the nominee's consent. League-controlled communication channels shall provide neutral, substantially equal candidate information and shall not be used by officers, directors, or staff of the election process to favor a candidate.

A member may support a candidate personally but may not use confidential Committee information, misuse a League account, intimidate another member, or represent that the League has endorsed a candidate in an internal election.

2.14 Post-Election Transition

After the Annual Meeting, the President and Secretary shall confirm election results and transition dates. Outgoing and incoming leaders shall begin transition promptly. The result shall be recorded in the Annual Meeting minutes and the official roster.

ARTICLE 3

Membership, Participation, Conduct, and Inclusion

3.1 Member Rights

Members have the right, subject to the bylaws and reasonable procedures, to:

- Receive notice of membership meetings and materials required by the bylaws.
- Participate in League education, discussion, volunteer work, committees, and leadership development.
- Raise questions, express respectful disagreement, and propose ideas without retaliation.
- Recommend candidates to the Nominating Committee and seek elective or appointed office when eligible.
- Know the League's current bylaws, policies, adopted program, and official positions.
- Speak and act as private individuals, including in partisan life, so long as they do not imply League authorization or endorsement.
- Request reasonable accommodations and raise concerns about access, safety, conduct, or policy compliance.

3.2 Member Responsibilities

Members participating in League work shall:

- Support the League's purposes and comply with its nonpartisan policy when acting for the League.
- Treat participants with dignity and respect.
- Distinguish personal views from League positions.
- Protect confidential information, personal data, records, and property.
- Follow authorized procedures, event rules, and reasonable directions of event or project leaders.
- Disclose conflicts of interest relevant to League decisions or assignments.
- Avoid knowingly false statements about the League, its members, or its decisions.
- Use League resources for League purposes.

3.3 Welcoming and Respectful Environment

The League shall foster an environment in which members, volunteers, partners, students, and community participants can ask questions, voice concerns, disagree, learn, and contribute without fear of humiliation, exclusion, retaliation, or misuse of authority. Courtesy does not require agreement, and disagreement does not excuse personal attacks or obstruction.

3.4 Non-Discrimination and Non-Harassment

Discrimination or harassment of any kind will not be accepted within the League. Prohibited conduct includes discrimination, harassment, bullying, intimidation, stalking, sexual harassment, threats, retaliation, or exclusion based on race, color, ethnicity, national origin, citizenship or immigration background, socioeconomic status, age, disability or ability status, religion, sex, sexual orientation, gender, gender identity or expression, marital or family status, pregnancy, veteran status, political viewpoint, or any other status protected by law.

This policy applies to in-person and virtual meetings, events, travel, email, social media, text or messaging groups, volunteer work, student activities, partnerships, and any setting in which a person is acting for or representing the League.

3.5 Personal Space, Boundaries, and Sexual Misconduct

Participants shall respect personal space, bodily autonomy, communication boundaries, and requests to stop unwanted conduct. Sexualized comments, unwanted touching, repeated unwelcome contact, coercive behavior, and romantic or sexual pressure connected to authority, age, access, mentorship, or volunteer opportunity are prohibited.

3.6 Power Dynamics, Dissent, and Anti-Retaliation

No leader or member may use office, seniority, age, donor status, institutional memory, social influence, control of information, or access to League opportunities to silence, punish, isolate, or pressure another person. Good-faith disagreement, candidacy for League office, requests for accommodation, refusal of an unsafe assignment, and reporting a concern are protected activities.

Leaders shall make particular effort to hear people who are newer, younger, less connected, geographically underrepresented, or less comfortable speaking in group settings.

3.7 Diversity, Equity, Inclusion, Access, and Belonging

DEIA is a whole-League responsibility and shall be integrated into governance, program, voter services, membership, communications, fundraising, partnerships, events, and leadership development. It is not delegated solely to the Director of Community Engagement, a DEIA leader, or a committee.

The League shall work to identify and dismantle barriers to participation, share power and information, broaden leadership pathways, and avoid treating historically excluded communities only as audiences rather than partners and leaders.

3.8 Regional Equity

The League shall serve Fredericksburg and the counties of Stafford, Spotsylvania, Caroline, and King George with equal seriousness. Planning shall consider geographic access, transportation, local culture, population, partner networks, public institutions, and the risk of concentrating activity in the most familiar communities.

Regional coordinators and the Regional Coordination Committee shall provide local knowledge and recommendations but may not independently commit the League or speak for it without authorization.

3.9 Accessibility and Accommodations

The League shall make reasonable efforts to ensure that meetings, events, materials, websites, forms, and volunteer opportunities are accessible. Event planning shall consider mobility, hearing, vision, neurodiversity, language, transportation, technology, cost, dietary, and scheduling barriers.

Accommodation requests shall be handled promptly and respectfully. Information about a person’s disability or accommodation need shall be shared only with those who need it to provide access or safety.

3.10 Conflict of Interest

Board members, committee chairs, coordinators with substantial authority, and other persons designated by the Board shall avoid actual, potential, and apparent conflicts between the League’s interests and personal, professional, business, financial, partisan, or organizational interests.

Covered persons shall complete a disclosure at the beginning of service and update it when a material change occurs. A person with a relevant interest shall disclose it before discussion, leave the discussion and vote unless the Board requests factual information, and not attempt to influence the decision. The minutes shall record the disclosure and recusal without unnecessarily disclosing private details.

No person shall use a League position for personal profit, preferential access, employment advantage, business solicitation, or benefit to an immediate family member or affiliated organization.

3.11 Confidentiality

Confidential League information shall be used only for authorized League purposes. Confidential information includes nonpublic member and donor data, passwords, legal advice, incident and conduct reports, background-check information, confidential Nominating Committee material, unreleased financial or grant information, and private information received from partners or participants.

Confidentiality shall not be used to conceal misconduct, prevent lawful reporting, or suppress discussion of information that is already public.

3.12 Nonmember Volunteers

The League may engage nonmember volunteers when their participation supports the mission and does not compromise nonpartisanship, safety, or accountability. Nonmember volunteers shall receive clear supervision, may be required to sign acknowledgments, and do not acquire membership rights or authority to represent the League.

Membership in a political party or partisan organization does not automatically disqualify a person from volunteering. While serving for the League, the volunteer shall comply fully with League neutrality, appearance, conduct, and communication rules.

3.13 Student Members and Student Affiliates

Persons at least sixteen years old are voting members as provided by the bylaws. Younger persons may participate as associate members, guests, students, or volunteers under applicable rules.

A student affiliate shall have a written recognition agreement or charter approved by the Board. The agreement shall identify its relationship to the League, use of name and logo, leadership structure, finances, records, nonpartisan obligations, communications approval, faculty or institutional requirements, and the role of the Director of Student Engagement.

Student affiliates may develop student-led work, but they may not adopt positions for the League, endorse candidates, enter agreements for the League, or make public statements in the League’s name without authorization.

3.14 Interactions with Minors

League interactions with minors shall be appropriate, transparent, and connected to legitimate program purposes. Whenever practical, meetings shall occur in public, institutional, group, or observable settings. Official League or institutional communication channels shall be used for program communication.

- Photographs, recordings, personal information, and participant lists involving minors shall be handled under applicable consent and institutional rules.
- Concerns involving abuse, exploitation, or danger shall be reported to the appropriate authority and institution as required by law and League procedure.

3.15 Role-Based Screening and Background Checks

The Board may require background checks, driving-record checks, references, financial disclosures, training, or enhanced supervision for roles involving contact with minors, substantial control of funds, access to sensitive data, transportation of participants, insurance requirements, or partner and venue requirements.

Screening shall be lawful, confidential, role-specific, and based on an individualized assessment. A conviction or other background information shall not automatically bar a person from all League participation unless required by law, an insurer, or a partner. The Board shall consider relevance, seriousness, time elapsed, evidence of rehabilitation, the duties of the role, and available safeguards.

The League shall not require disclosure of unproven allegations or pending investigations unless a law, insurer, institutional partner, or specific safety circumstance requires it. Screening records shall be maintained separately with restricted access.

ARTICLE 4

Meetings, Minutes, Records, and Technology

4.1 Official Business and Informal Discussion

Official business includes decisions, recommendations, commitments, assignments, use of funds, public positions, partnerships, and other action taken by a body or leader under League authority. Informal discussion, brainstorming, social conversation, and preliminary coordination do not bind the League.

A material decision shall not be made through a chain of private conversations or messages designed to avoid the meeting, notice, quorum, or recordkeeping requirements applicable to the body.

4.2 Meeting Types

Board, Annual, general membership, special membership, standing committee, study committee, budget committee, nominating committee, and other formal League meetings shall be conducted under the bylaws, applicable parliamentary authority, and the charter or procedures of the body.

Project and logistics meetings may use streamlined procedure, but they remain subject to conduct, records, financial, nonpartisan, and communication policies.

4.3 Notice, Agendas, and Materials

Meeting notices required by the bylaws shall be provided within the stated time. Board and committee agendas should identify decisions requested, reports, consent items, and confidential matters. Materials should be distributed early enough for informed participation whenever practical.

The President shall prepare Board agendas in coordination with the Secretary and Vice President. Members of the Board may request agenda items. The presiding officer may reorder an agenda, but may not use agenda control to prevent the Board from considering a properly raised matter.

4.4 Minutes Required

Formal minutes shall be kept for Board meetings, Annual Meetings, general and special membership meetings, and formal committee or working-group meetings that transact business, make recommendations, exercise delegated authority, or handle funds.

Minutes shall ordinarily record:

- Name of the body, date, time, location or virtual method, and presiding officer.
- Members present and absent; guests when relevant; and whether quorum was established.
- Approval or correction of prior minutes.
- Motions, amendments, and vote result; individual votes only when required or requested under proper procedure.
- Reports received and material documents attached or incorporated by reference.
- Decisions, assignments, deadlines, recusals, and notices required for later action.
- Time of adjournment.

Minutes are an official action record, not a transcript. They should not attribute ordinary debate, reproduce personal comments, or include unnecessary confidential or defamatory detail.

4.5 Action Notes for Informal Meetings

Informal planning calls, logistics meetings, and conversations do not require formal minutes. If such a discussion produces a material commitment, assignment, recommendation, spending request, deadline, or partner understanding, the responsible leader shall create a short action note and store it in the relevant official folder.

4.6 Preparation and Approval of Minutes

Draft Board and membership minutes should be prepared and circulated within ten business days when practical. Board and membership minutes shall be approved at the next meeting of the same body. Committee minutes may be approved at the next committee meeting or by a method stated in the charter.

Corrections shall reflect what occurred, not rewrite a later disagreement. Approved minutes shall be clearly marked as approved and shall replace the draft in the primary archive without deleting the draft.

4.7 Publication of Minutes and Board Action Summaries

4.7.1 Official Board Minutes.

The Secretary shall maintain complete approved minutes of every Board meeting as the authoritative record of Board action. Official Board minutes are internal governance records and shall not be posted publicly by default.

4.7.2 Public Board Action Summary.

Within thirty days after the underlying Board minutes are approved, the Secretary shall prepare, and the Director of Communications shall publish, a public Board action summary. The summary shall be clearly identified as a summary and not as the official minutes.

The public Board action summary shall ordinarily include:

- The date and type of meeting.
- The names of Board members present.
- The major matters considered.
- Motions adopted, rejected, postponed, or referred.
- Vote outcomes, including recorded individual votes when a recorded vote was taken.
- Material financial approvals and budget changes.
- Policies, appointments, partnerships, contracts, programs, and projects approved.
- Matters referred for future membership or Board action.
- Notice that the Board entered a confidential session and the general subject of that session, when appropriate.

The summary shall not include confidential, privileged, personally identifying, security-related, donor, background-check, youth-protection, volunteer-performance, personnel, complaint, investigation, or negotiation information.

4.7.3 Publication of Complete Board Minutes.

The Board may direct that complete approved Board minutes be published when it determines that publication is appropriate. Any published minutes shall receive the same confidentiality and redaction review required for a public Board action summary.

4.7.4 Annual Meeting and Membership Minutes.

Approved Annual Meeting minutes shall be posted publicly. Approved minutes of general or special membership meetings shall be made available to members and may be posted publicly when directed by the Board. Materials containing confidential or protected information shall be redacted or maintained separately.

4.7.5 Committee Records.

Committee and working-group minutes are internal records unless the Board or applicable committee charter requires publication. The Board may authorize a public committee report or summary when publication would advance transparency or public understanding.

4.7.6 Responsibility for Accuracy and Publication.

The Secretary is responsible for the accuracy of the public action summary and any redactions. The Director of Communications is responsible for posting the approved summary in the designated public location. Questions about withholding or redacting information shall be referred to the President and, when necessary, the Board or legal counsel.

4.8 Confidential Sessions and Records

A Board or committee may enter a confidential session to discuss legal advice, personnel or conduct matters, background checks, security, negotiations, donor privacy, or other sensitive matters. The motion to enter and leave the session shall be recorded. Formal action should be taken in open session unless confidentiality, law, or legal advice requires otherwise.

Confidential minutes or notes shall be stored separately with restricted access.

4.9 Official League Technology

League business shall be conducted through official League email, shared drives, calendars, collaboration platforms, forms, website systems, and other Board-approved tools whenever reasonably practical. Personal accounts and messaging applications may be used for informal logistics but shall not be the sole repository of official decisions, records, passwords, membership data, partner contacts, or project files.

Material information originating in a personal account shall be transferred promptly to an official system.

4.10 Records Ownership and Custody

Records created, received, or maintained in the course of League service belong to the League. Leaders are custodians, not owners, of portfolio files, mailing lists, graphics, photographs, research, procedures, contacts, contracts, and account credentials.

The Secretary is the primary records officer. The Treasurer is custodian of financial records, the Director of Communications of communication assets, and each portfolio leader of current working files, all subject to the Secretary's archive standards and Board access.

4.11 Record Retention and Archives

The League shall maintain a Board-approved Records, Data, Access, and Retention Schedule implementing this section. No schedule may authorize destruction earlier than the minimum periods stated below.

4.11.1 Permanent Records.

The following shall be retained permanently:

- Articles of incorporation, tax-status records, and other foundational organizational documents.
- Bylaws and all adopted amendments.
- Every adopted edition of the Policy Handbook, together with change logs and adoption records.
- Approved Annual Meeting, membership, and Board minutes.
- Public Board action summaries.
- Official election results and leadership rosters.
- Annual budgets, annual financial reports, and financial review or audit reports.
- Adopted program, local positions, concurrence records, consensus records, and final study reports.
- Major annual reports, historical reports, significant publications, and records documenting major organizational decisions.
- Records concerning real property, intellectual property, or other continuing legal rights.

4.11.2 Seven-Year Records.

The following shall ordinarily be retained for at least seven years after the end of the applicable fiscal year, expiration of the agreement, completion of the grant, or closure of the matter:

- Bank statements, reconciliations, receipts, invoices, reimbursements, and accounting records.
- Tax filings and supporting documentation.
- Grant agreements, financial records, required reports, and donor restrictions.
- Contracts, leases, sponsorship agreements, and material vendor records.

- Insurance policies and closed claim records.
- Records supporting restricted gifts and major financial commitments.

4.11.3 Four-Year Records.

The following shall ordinarily be retained for at least four years after completion of the activity:

- Event planning and evaluation files.
- Candidate-forum invitations, procedures, correspondence, and final materials.
- Election-cycle and voter-service planning files.
- Volunteer certifications and completed training records.
- Routine partnership and coalition records.
- Routine grant-development and sponsorship-prospect files that did not result in an agreement.
- General administrative correspondence having continuing organizational value.

4.11.4 Two-Year Records

The following shall ordinarily be retained for no longer than two years after completion of the applicable activity unless a continuing need exists:

- Routine event registrations.
- Nonessential volunteer sign-up records.
- Duplicate working drafts and routine scheduling correspondence.
- Temporary project-management records that have been incorporated into a final report or permanent file.
- Routine communication drafts that do not document a material decision.

4.11.5 Sensitive Temporary Information.

Dietary information, accommodation details, emergency contacts, copies of identification documents, duplicate membership exports, transportation details, and similar sensitive information shall be deleted or securely destroyed when the activity and any legitimate follow-up need have ended, unless retention is legally required.

Background-check and screening records shall be retained and destroyed under a confidential procedure reviewed for compliance with applicable law, insurer requirements, and vendor terms. Raw reports shall not be retained longer than necessary.

4.11.6 Extended Retention and Preservation Holds.

A record shall be retained longer when required by law, grant terms, contract, insurer, tax requirement, archival value, or Board direction. No relevant record may be altered or destroyed when litigation, an audit, investigation, insurance claim, formal complaint, government inquiry, or other dispute is pending or reasonably anticipated.

4.11.7 Archival Transfer.

The Secretary may recommend transfer of historically significant records to an appropriate local archive, library, historical society, or university repository. Any transfer shall protect confidential and restricted information and preserve reasonable League access.

4.12 Passwords, Accounts, and Cybersecurity

All critical League credentials shall be stored in a secure password manager or other Board-approved system. The President and at least one additional officer shall have emergency access. Multi-factor authentication shall be used when available.

- Passwords shall not be stored in public or broadly shared documents.
- Access shall be limited to current role needs and reviewed at least annually.
- Departing leaders shall transfer access immediately; access shall be removed when no longer needed.

- Suspected account compromise, phishing, loss of a device containing League data, or unauthorized access shall be reported promptly.

4.13 Personal Data and Privacy

The League shall collect only information reasonably needed for membership, programs, voter services, volunteering, fundraising, communications, safety, or legal compliance. Personal data shall not be sold or shared for unrelated purposes.

Access to member, donor, student, and volunteer data shall be limited by role. Public directories, participant lists, photographs, and contact sharing require appropriate notice or consent. Sensitive data shall be deleted or anonymized when no longer needed under the retention schedule.

4.14 Records and Data Governance Review

The Secretary shall lead an annual review of the League's records, data, privacy, retention, access, and archival practices. The review shall examine the systems the League actually uses, its administrative capacity, and whether the requirements of this Article remain practical and effective.

The following officers and directors shall participate within their areas of responsibility:

- Secretary: Overall records inventory, file organization, permanent records, retention, legal holds, and archival transfer.
- Treasurer: Financial, banking, reimbursement, donor, grant, sponsorship, tax, contract, and insurance records.
- Director of Communications: Website, newsletter, social-media, photography, video, graphic, press, publication, and communication-platform records.
- Director of Membership: Membership records, contact information, mailing lists, volunteer interests, directories, and membership-data access.
- Director of Student Engagement: Student, minor, educational-partner, internship, mentorship, and student-affiliate records.
- Director of Voter Services: Voter-service, candidate-forum, Vote411, election-information, training, and voter-registration records.
- President and Vice President: Account ownership, emergency access, cross-portfolio access, continuity, and leadership-transition compliance.
- Other Directors: Records and data created within their respective portfolios.

The review shall identify:

- Every official system, account, shared drive, database, platform, and material personal account used for League business.
- The person or office responsible for each system.
- The categories of information stored in each system.
- The appropriate public, member, internal, or restricted classification.
- Current access permissions and unnecessary access.
- Backup, migration, deletion, and account-closing procedures.
- Records located outside official League systems.
- Retention, privacy, security, or capacity problems requiring Board action.

The Secretary shall present material findings and recommended changes to the Board. Individual officers and directors may update routine file organization and procedures within their portfolios but may not independently alter substantive retention periods, public-access rules, privacy classifications, or cross-portfolio access requirements.

4.15 Decisions Between Meetings

Email polling, text messages, and informal agreement may be used to assess views or prepare a proposal, but shall not substitute for Board or membership action unless the bylaws and applicable law expressly permit action without a meeting. Any emergency operational action taken under delegated authority shall be reported and documented at the next meeting.

ARTICLE 5

Communications, Nonpartisanship, and Election Activities

5.1 Official Spokesperson

The President is the chief official spokesperson of the League unless the President designates another person. The President may authorize officers, directors, chairs, coordinators, subject-matter leads, or members to communicate for the League within a defined scope and may modify or withdraw that authority.

5.2 Communications Approval Categories

League communications shall be managed according to the following categories:

- Routine informational communications: approved events, meeting reminders, factual civic information, membership notices, and previously approved content may be issued by the Director of Communications or an authorized delegate.
- Portfolio communications: an officer or director may approve routine content within an adopted plan and subject-matter lane, with communications review when public-facing.
- Advocacy and public-position communications: require confirmation of the underlying position and authorization under Article 6.
- Board statements: statements presented as the view of the Board require Board approval unless covered by a standing authorization.
- Sensitive or high-risk communications: legal disputes, conduct matters, candidate controversies, election errors, financial incidents, and crisis responses require presidential and appropriate Board or professional review.

5.3 Communications Workflow

Committees, chairs, coordinators, student affiliates, and members shall route proposed official public communications through the supervising officer or director and the President, Director of Communications, or authorized designee. Approval may be given by standing workflow rather than individual review of every routine post.

A communication is not approved merely because it was discussed, drafted, scheduled, or posted previously.

5.4 Individual Speech and League Speech

Members may speak, write, testify, publish, and engage politically as individuals. When there is a reasonable possibility of confusion, a member shall make clear that personal views are not League positions.

A person shall not use League letterhead, logo, mailing list, account, title, event, or partner relationship to advance a personal position or candidate. A League title may be used as biographical identification only when it does not imply authorization and when the context clearly distinguishes the personal capacity.

5.5 Board and Committee Communications

An individual Board member may not issue a statement as a "Board statement" without Board approval. A committee may report its work and recommendations internally but may not publish a committee position as a League position unless authorized.

5.6 Brand, Logo, and Accessibility Standards

All official public communications shall follow current LWVUS and LWV-VA brand, logo, attribution, and accessibility standards. Materials shall use accurate League names, approved logos, readable design, plain language where practical, and accessible digital formats.

Partner use of the League's name or logo requires written approval and shall not imply candidate endorsement, party affiliation, or support for a partner's unrelated positions.

5.7 Use of Generative Artificial Intelligence

LWVFRA may use generative artificial-intelligence tools as assistive aids for research, outlining, editing, or drafting. A designated human reviewer remains responsible for each resulting work product and shall carefully verify facts, citations, accuracy, nonpartisanship, tone, accessibility, and compliance with all applicable approval requirements before the material is relied upon, circulated, or published. AI output shall not substitute for substantive human review.

No confidential, personal, donor, member, volunteer, student, partner, credential, or other nonpublic League information may be entered into a generative-artificial-intelligence tool except as authorized under Article 4 and any Board-approved procedure.

LWVFRA shall not use generative artificial intelligence to create or materially alter graphics, illustrations, photographs, logos, video, or other visual materials. The Board may impose additional limits or prohibit use for a particular project, tool, or category of material.

5.8 Social Media and Digital Conduct

League social media accounts are official channels. Administrators shall use approved content, protect credentials, preserve records of material statements, correct errors promptly, and avoid personal arguments from League accounts.

Comments may be moderated under a publicly available rule addressing threats, harassment, spam, unlawful content, personal data, and disruption. Viewpoint disagreement alone is not a basis for removal.

5.9 Media Relations, Corrections, and Crisis Communications

Media inquiries shall be referred to the President, Director of Communications, or authorized spokesperson. A material factual error issued by the League shall be corrected promptly and transparently. Crisis communication shall prioritize accuracy, safety, legal obligations, and a single coordinated point of contact.

5.10 Nonpartisan Foundation

The League shall not support or oppose any political party or candidate. Nonpartisanship applies to the League's name, funds, events, communications, voter services, partnerships, volunteers acting for the League, and the conduct of leaders whose activity may reasonably be attributed to the League.

Nonpartisanship does not prevent the League from taking positions and acting on selected governmental issues after proper study, member agreement, concurrence, or authorization.

5.11 Personal Political Activity of Members

Members retain the right to vote, join parties, contribute, campaign, attend political events, endorse candidates, seek office, and engage in issue advocacy as private individuals, subject to the heightened restrictions applicable to visible leadership roles and the duty not to imply League support.

Personal partisan activity shall be separated from League time, channels, records, equipment, events, clothing, and titles.

5.12 Restrictions on Visible Leadership Roles

A person serving in a visible leadership role shall protect the public credibility of the League and shall not, during the term of that role:

- Publicly endorse or oppose a candidate or political party.
- Serve as an officer, spokesperson, paid staff member, campaign manager, treasurer, or public fundraising lead for a political party or candidate committee.
- Host, headline, or publicly promote a candidate fundraiser.
- Use a League title in connection with campaign activity.
- Display candidate or party campaign materials while representing the League or in a manner prominently connected to the person's League identity.

- Make a reportable contribution to a candidate committee or political party committee when public disclosure would identify the contribution during the term of service.

Voting, private political beliefs, and private conversations are not restricted. The Board may grant a narrow written exception when permitted by higher League policy and when the exception will not reasonably compromise the League's credibility.

5.13 Political Activity of Other Board Members and Leaders

Other Board members and appointed leaders may engage in personal political activity if they do not use League resources or title, do not act as a public campaign spokesperson in a manner likely to create confusion, and do not participate in League decisions where the activity creates a conflict.

A Board member shall disclose a campaign leadership role, party office, or other highly visible partisan role to the President and Board so that appropriate separation, recusal, reassignment, or leave may be considered.

5.14 Candidacy for Public Office

A member who becomes a candidate remains a member but shall not use League resources or activities to advance the candidacy.

An officer, director, or appointed leader who intends to seek partisan public office shall notify the President before announcement or filing and shall resign from the Board or leadership role no later than public announcement or filing, whichever occurs first.

A leader who intends to seek nonpartisan public office shall notify the President before announcement or filing. The Board shall assess the office, election, endorsements, visibility, relationship to League work, and risk to neutrality. A person in a visible leadership role shall step down from that role during the candidacy. The Board may require resignation, leave, recusal, or reassignment for any other leader when necessary to protect the League.

5.15 Nonpartisan Offices and Partisan Endorsements

The legal designation of an office as nonpartisan does not eliminate the possibility of partisan appearance. A political party's endorsement of a candidate for a nonpartisan office does not convert the office into a partisan office for League procedure, but it shall be considered in conflict and credibility review.

Candidates for nonpartisan office shall receive the same neutral treatment as other candidates. The League shall not favor or disadvantage a candidate because of a party endorsement, prior party activity, or refusal to seek party support.

5.16 Interactions with Parties, Candidates, and Partisan Entities

The League may communicate with parties, campaigns, candidates, and partisan organizations for neutral voter education, scheduling, candidate forums, public information, legislative advocacy, coalition communication, or other mission-related purposes. Such interaction does not constitute endorsement.

- All similarly situated candidates shall receive substantially equal opportunity under written procedures.
- Partisan entities shall not control League content, questions, moderators, branding, volunteer assignments, or participant data.
- No candidate or party may use a League event as a campaign rally, fundraising opportunity, or exclusive platform.
- Candidate and party representatives may attend public League events under the same rules as other members of the public.
- A candidate endorsed by another organization remains subject to the same League procedures as any other candidate.

5.17 Candidate Forums and Candidate Events

Candidate forums shall use written, neutral procedures approved by the Director of Voter Services and President. Procedures shall address eligibility, invitations, candidate confirmation, empty-chair circumstances, moderators, question development, timing, recording, audience conduct, accessibility, co-sponsors, publicity, and cancellation.

All official candidates for the office shall ordinarily be invited on equal terms. A forum shall not be structured to promote or disadvantage a candidate. Candidate substitutes, campaign materials, fundraising, and partisan displays are prohibited unless a neutral written rule expressly permits a limited practice equally.

The League shall distinguish a candidate forum from an issue event, public-official briefing, town hall, or legislative session and shall label the event accurately.

5.18 Voter Registration and Election Volunteers

Persons representing the League in voter registration, election information, Vote411, candidate forums, or other voter-service work shall remain strictly nonpartisan during the assignment. They shall not wear or display candidate, party, or partisan-issue material; discuss their candidate preferences; recommend how a person should vote; or collect voter information for non-League use.

Required training and certifications shall be completed before service. Volunteers shall follow Virginia law, election-official guidance, venue rules, and League procedures.

5.19 Accuracy of Election Information

Election dates, deadlines, districts, offices, candidate information, registration rules, and voting procedures shall be verified through authoritative sources before publication. Material errors shall be corrected promptly through the same channels used to distribute the original information when practical.

ARTICLE 6

Program, Advocacy, Partnerships, and Public Action

6.1 Distinction Among Education, Program, Position, and Action

The League shall distinguish among general civic education, formal member study, consensus, concurrence, adopted positions, and authorized action. Educational programming may present balanced factual information without creating a League position. Advocacy in the League’s name must be grounded in League Principles or an applicable adopted local, state, or national position and must follow required approval procedures.

6.2 Local Program

The local program shall be developed and adopted under the bylaws. The Director of Program shall maintain a current program calendar and a public or member-accessible summary identifying adopted studies, positions, action authority, and the status of each item.

6.3 Study Committees and Objective Research

A study committee shall operate under a Board-approved scope, timetable, research plan, and reporting relationship. Research shall be objective, documented, reasonably comprehensive, and open to relevant competing evidence. Study materials shall distinguish fact, analysis, source limitations, and unresolved questions.

6.4 Consensus

Consensus is a structured process for determining member understanding and substantial agreement, not a simple majority vote on advocacy language. Consensus questions, background material, notice, facilitation, participation records, and the synthesis of member agreement shall be documented.

The Board shall ensure that a proposed position accurately reflects the consensus reached and may return the proposal for clarification without substituting its own policy preference.

6.5 Concurrence

A proposal to concur with another League position shall identify the originating League, the text of the position, the process by which it was adopted, the supporting material, the relationship to local needs, and any limitations. Concurrence shall follow the notice and membership-approval requirements in the bylaws.

6.6 Position Records and Review

The Secretary and Director of Program shall maintain an official file of local positions, adoption dates, underlying studies, amendments, concurrence records, and Board interpretations. Positions should be reviewed periodically for clarity, continued relevance, and consistency with state and national positions.

6.7 Authorization of Action

The Board may authorize advocacy, education, coalition work, public communication, testimony, letters, public comment, or other action to implement an applicable position. The authorization shall identify the position, objective, level of government, spokesperson, communication method, partner involvement, and any required state or national clearance.

The President may approve routine implementation within a Board-approved campaign or standing authorization. A new, controversial, legally significant, or materially different action shall return to the Board.

6.8 State and Federal Action Clearance

Before initiating action at the Commonwealth level, the League shall obtain the approval required by LWV-VA. Before initiating action at the federal level, the League shall follow LWVUS and LWV-VA request and notice procedures. A local leader may not use a local position to act at another level of government without required clearance.

Members responding to a local, state, or national action alert shall follow the alert's instruction about whether to act as League members or private constituents.

6.9 Letters, Testimony, Public Comment, and Statements

Official letters, testimony, public comments, and statements shall identify the authorizing position and be approved by the President or designee. A Board statement shall also receive Board approval unless covered by standing authorization.

A member may be authorized to draft or deliver the communication. The final version and any delivered revision shall be archived. A person presenting personal testimony shall not use League title or imply League authorization unless approved.

6.10 Rapid Response

When a time-sensitive local event requires response before a Board meeting, the President may authorize action that is clearly within an existing position and consistent with prior Board direction. The President should consult the Director of Program and relevant director whenever practical and shall report the action to the Board.

Rapid response may not create a new position, contradict a League position, or bypass required state or national clearance.

6.11 Coalitions and Partnerships

The League may join or work with coalitions and community partners when the relationship advances the mission, is consistent with League positions and nonpartisanship, and preserves the League's independent judgment.

Before a material partnership is approved, the responsible leader shall consider:

- Purpose, term, responsibilities, cost, and expected public benefit.
- Partner mission, reputation, partisan or candidate activity, and conflicts with League policy.
- Control of content, branding, participant data, funds, and public statements.

- Accessibility, inclusion, safety, and geographic equity.
- Exit rights and the effect of withdrawal.

6.12 Partnerships with Partisan or Candidate-Connected Organizations

A relationship with a partisan entity shall be limited to a neutral, defined purpose such as voter education, public information, or a broadly based coalition on an issue supported by an adopted League position. The League shall not co-brand campaign material, share supporter data, participate in candidate fundraising, or permit the relationship to imply endorsement.

6.13 Joint Statements and Use of Name

The League shall not sign a joint statement, petition, advertisement, amicus request, or coalition letter unless the content is supported by an applicable position and approved by the President or Board under the communication and action rules. The exact final text shall be reviewed before the League's name is added.

6.14 Observation Corps

Observation Corps participants attend public governmental meetings to observe, learn, and report, not to advocate during the assignment unless separately authorized. Reports should be factual, identify the meeting and decisions, distinguish observation from interpretation, and avoid attributing personal motives.

6.15 Events with Public Officials

The League may invite public officials, candidates, experts, advocates, and community members to educational events. Invitations and formats shall be designed around the event's purpose and shall not create candidate endorsement or unfair electoral advantage. An officeholder may discuss official duties; campaign activity and fundraising remain prohibited.

ARTICLE 7

Financial and Resource Stewardship

7.1 Fiduciary Responsibility

League funds and property shall be used only for authorized League purposes. The Board is collectively responsible for financial direction and oversight. The Treasurer administers financial systems and provides the information necessary for responsible Board decisions.

7.2 Budget Committee and Annual Budget

The Budget Committee shall be appointed within the period required by the bylaws. The Treasurer serves ex officio. The Committee shall solicit projected needs from officers, directors, committees, and major projects; review expected income; identify restricted funds; and prepare a realistic proposed budget and explanatory assumptions.

The Board shall review and recommend the budget for membership action within the bylaw notice period.

7.3 Budget Administration

The adopted budget authorizes categories and limits but does not eliminate documentation, conflict, procurement, or approval requirements. The Treasurer shall provide regular budget-to-actual reports. Portfolio leaders shall monitor their allocations and inform the Treasurer before commitments that may exceed budget.

The Board may amend the operating budget during the year when consistent with the bylaws and any instructions of the membership.

7.4 Expenditure Authority and Financial Approval Schedule

No expenditure, purchase, contract, subscription, reimbursement, or other financial commitment shall be made unless authorized through the adopted budget, a Board motion, or a written delegation approved by the Board. Inclusion of an expense in the adopted budget authorizes the purpose and budget category but does not, by itself, authorize any individual to make or approve the expenditure.

7.4.1 Budgeted Expenditures of $100 or Less.

A budgeted expenditure of $100 or less may be authorized by the officer or director responsible for the applicable budget category. The Treasurer shall confirm the availability of funds and receipt of required documentation before issuing or processing payment.

7.4.2 Budgeted Expenditures Between $100.01 and $500.

A budgeted expenditure between $100.01 and $500 requires the approval of both the officer or director responsible for the applicable budget category and the Treasurer.

7.4.3 Unbudgeted Expenditures of $100 or Less.

An unbudgeted expenditure of $100 or less requires the joint approval of the President and Treasurer and shall be reported to the Board at its next regular meeting.

7.4.4 Expenditures Requiring Board Approval.

Prior Board approval is required for:

- Any individual expenditure exceeding $500.
- Any unbudgeted expenditure exceeding $100.
- Any contract, subscription, lease, installment arrangement, or series of related payments creating a total League commitment exceeding $500.
- Any obligation extending beyond one year.
- Any expenditure that would materially exceed or alter an adopted budget category.
- Any payment to a Board member, immediate family member of a Board member, or business or organization in which a Board member has a material financial interest.

7.4.5 Emergency Expenditures.

When an expenditure is immediately necessary to protect health, safety, League property, legal compliance, account security, or the continuation of an authorized activity, the President and Treasurer may jointly authorize an unbudgeted emergency expenditure of up to $250. The expenditure and the reason for it shall be reported to the Board at its next meeting.

7.4.6 Conflicts and Substitute Approvers.

No person may approve a payment or reimbursement to themselves. When the Treasurer is the person requesting payment or is otherwise conflicted, the President shall perform the Treasurer’s approval function. When the President is the person requesting payment or is otherwise conflicted, the Vice President or Secretary shall perform the President’s approval function.

7.4.7 Appointed Leaders and Committees.

A committee, chair, coordinator, project lead, or volunteer may recommend or request an expenditure but may authorize spending only when the Board has provided a written spending delegation. The supervising officer or director remains responsible for ensuring compliance with the budget and this section.

7.4.8 Prohibition on Dividing Transactions.

A purchase, project, contract, or series of related expenditures shall be evaluated according to its total reasonably anticipated cost. Transactions may not be divided or submitted separately for the purpose of avoiding an approval threshold.

7.4.9 Restricted Funds.

An expenditure from grant funds, donor-restricted funds, education-fund resources, or other restricted funds must comply with both this approval schedule and all restrictions applicable to those funds. The more restrictive requirement controls.

These amounts may be reviewed annually by the Treasurer and Budget Committee. Any recommended change requires Board approval and amendment of the Handbook.

7.5 Reimbursement

Reasonable, necessary, and authorized League expenses may be reimbursed. A reimbursement request shall identify the purpose, date, amount, budget category, and approval and shall include receipts or an explanation of why a receipt is unavailable.

Requests should be submitted within thirty days and no later than thirty days after the fiscal year ends unless the Treasurer approves an exception. Sales tax, tips, mileage, travel, and meal reimbursement shall follow Board-approved rates and limits.

A reimbursement request shall follow the approval requirements of Section 7.4. The person requesting reimbursement may not approve the request.

The League is not obligated to reimburse an unapproved or inadequately documented expense.

7.6 Procurement, Vendors, and Contracts

Purchases shall be reasonable, mission-related, and free from undisclosed conflict. Competitive quotes should be obtained for significant purchases when practical. Vendor selection may consider cost, quality, reliability, accessibility, local benefit, minority- or woman-owned status, sustainability, and prior performance.

Only persons authorized by the bylaws or Board may sign a contract. Contracts shall be reviewed for price, term, cancellation, indemnification, insurance, intellectual property, data, accessibility, and venue obligations. Multi-year, high-risk, or legally complex agreements should receive professional review.

7.7 Receipt and Deposit of Funds

All funds received shall be recorded and deposited promptly into a Board-approved account. Cash received shall not be used directly to pay expenses. At events, two people should count substantial cash receipts when practical and sign a reconciliation record.

7.8 Banking and Internal Controls

League funds shall be held in insured or otherwise Board-approved financial institutions. Authorized signers and electronic access shall be reviewed after each officer transition. Blank checks, payment credentials, and financial data shall be secured.

- Bank and payment-platform statements shall be reconciled regularly.
- A person who prepares or initiates a payment should not be the sole person reviewing the reconciliation when practical.
- Electronic payments shall receive the same documentation and authorization as checks.
- The Treasurer shall not issue or process payment until the approvals required by Section 7.4 have been documented.

7.9 Financial Reporting

The Treasurer shall present regular reports to the Board and an annual report to the membership. Reports shall show account balances, income and expenses, budget variance, restricted funds, outstanding obligations, and material risks.

The Board shall receive enough information to understand the League's financial position; financial reporting shall not be limited to a bank balance.

7.10 Financial Review or Audit

The Treasurer shall arrange the financial review or audit required by the bylaws, law, grant, insurer, or Board. A reviewer shall be independent of routine financial administration and shall have appropriate competence. Findings and corrective actions shall be reported to the Board and preserved.

7.11 Grants and Restricted Funds

Before accepting a grant, the Board or authorized officers shall review the purpose, budget, reporting, match, recordkeeping, intellectual-property, publicity, and compliance requirements. Restricted funds shall be separately tracked and used only for the stated purpose.

A project leader may not promise grant deliverables, sponsorship benefits, or partner commitments before authorization. Grant records shall be maintained in the official drive and financial system.

7.12 Fundraising

Fundraising shall be approved by the Board or conducted under an adopted plan. Solicitations shall accurately describe the League, the intended use of funds, tax deductibility, any fiscal sponsor or education-fund arrangement, and material donor benefits.

Fundraising shall remain nonpartisan and shall not create donor control over League positions, candidate activity, program conclusions, or editorial judgment.

7.13 Sponsorships

A sponsorship may be accepted when the sponsor and proposed benefits are consistent with the League's mission, reputation, nonpartisanship, and legal status. Recognition shall be proportional and shall not be presented as endorsement of the sponsor's products, policies, candidates, or political activity.

The Board shall review sponsorships involving partisan-connected entities, regulated industries, substantial reputational risk, naming rights, exclusivity, or material influence over content.

7.14 In-Kind Gifts

In-kind gifts shall be accepted only when useful, safe, lawful, and not unreasonably burdensome to store, maintain, insure, or dispose of. The donor is responsible for valuation unless law requires otherwise. Restrictions shall be documented.

7.15 Donor Privacy and Acknowledgment

Donor information shall be protected and used for authorized League purposes. Public recognition requires the donor's consent when the gift is not already public. Anonymous gifts may be accepted when lawful and when the League can complete necessary due diligence.

Acknowledgments and tax receipts shall be issued accurately and promptly. The League shall not promise tax deductibility beyond the status of the entity receiving the gift.

7.16 Merchandise and Event Revenue

Merchandise, ticketing, suggested donations, raffles, auctions, percentage nights, and other revenue activities require advance review for budget, tax, licensing, vendor, intellectual-property, and nonpartisan implications. Inventory and revenue shall be documented.

7.17 Property and Inventory

League property shall be inventoried, labeled when practical, stored securely, and used for League purposes. A person borrowing equipment shall be responsible for reasonable care and return. Disposal of valuable property requires Treasurer or Board authorization.

7.18 Insurance

The Board shall review insurance needs at least annually, including directors and officers liability, general liability, property, cyber, event, volunteer, automobile, and youth-related coverage as applicable. The League shall comply with insurer notice and risk-control requirements.

ARTICLE 8

Volunteers, Events, Safety, and Risk Management

8.1 Volunteer Management

Volunteers shall receive a clear role, supervisor, scope, schedule, and training appropriate to the assignment. Volunteer opportunities should be designed at varied levels of time, skill, mobility, geography, and experience.

A volunteer may be reassigned or removed from an activity for safety, nonperformance, policy violation, conflict, disruption, or organizational need. Removal from an assignment does not by itself terminate membership.

8.2 Orientation and Acknowledgments

The Board may require members and nonmembers to acknowledge applicable nonpartisan, conduct, confidentiality, youth-safety, data, and event rules before serving in designated roles. A refusal to complete required training or acknowledgment may result in exclusion from that assignment.

8.3 Voter-Service Volunteer Certification

A voter-registration or election volunteer shall certify that required training has been completed; that the volunteer will comply with law, election-official guidance, venue rules, and League procedure; and that the assignment will be performed in a strictly nonpartisan manner.

The certification shall include commitments to respectful conduct, accurate information, protection of personal data, appropriate interactions with students and minors, and prompt reporting of problems. It shall not require broad disclosure of unrelated criminal history or unproven investigations.

8.4 Event Authorization and Planning

Every public event shall have an identified Board portfolio lead or authorized project lead. Major events shall use a written plan addressing purpose, audience, partners, venue, budget, accessibility, communications, registration, volunteers, safety, data, photography, setup, cleanup, and post-event records.

The substantive portfolio leader remains responsible for content. An Events Coordinator or committee may manage logistics but does not have broad authority to independently approve the event's message, expenditure, partner, or public representation.

8.5 Venue and Partner Rules

League participants shall comply with lawful venue, school, library, government, campus, partner, and permit rules. The event lead shall identify material restrictions before the event and shall not agree to a rule that compromises nonpartisanship, access, safety, or the League's independent judgment without Board review.

8.6 Safety and Appropriate Conduct

Event leaders may give reasonable safety directions, pause or end an activity, remove a disruptive participant, contact venue staff, or request emergency assistance. Safety decisions shall be proportionate and shall not be used to suppress protected disagreement.

8.7 Youth-Facing Programs

Recurring youth-facing programs shall have a written protocol addressing adult supervision, communication channels, consent, transportation, photography, emergency contacts, school or institutional requirements, and required screening. Volunteers shall receive the protocol before service.

8.8 Screening and Assignment Restrictions

The Board shall identify positions requiring screening before recruitment or assignment. A confidential screening decision should be made by at least two disinterested authorized persons. The person shall be informed of a restriction in general terms and may request Board review, subject to privacy and safety limits.

8.9 Incident Reporting

An injury, threat, harassment concern, youth-safety concern, data breach, financial irregularity, property loss, serious disruption, or other material incident shall be reported promptly to the event lead and President or designee. An incident report shall record facts, immediate response, witnesses, notifications, and follow-up without speculation.

The President or designee shall determine whether notice is required to an insurer, venue, partner, parent or guardian, law enforcement, legal counsel, election official, or other authority.

8.10 Emergency Response

In an emergency, protection of life and safety takes priority over normal approval procedure. Leaders may contact emergency services, evacuate or shelter, suspend the event, preserve evidence, and communicate necessary instructions. Public statements shall be coordinated under Article 5.

8.11 Photography, Recording, and Media Releases

Event notices should state when photography or recording is expected. The League shall provide a reasonable method for participants to request not to be featured when practical. Individual consent or institutional authorization shall be obtained when required, particularly for minors, private events, interviews, and identifiable personal stories.

Recordings and photographs are League records when created for the League and shall be stored, used, and deleted under the records and privacy policies.

8.12 Travel and Transportation

League-sponsored travel and transportation require advance authorization, an identified purpose, reasonable safety planning, and compliance with insurance requirements. A volunteer transporting others may be required to provide a valid license, proof of insurance, and driving-record authorization.

Transportation of minors requires specific protocol and consent.

8.13 Alcohol and Adult Venues

The League may hold an event at a venue that serves alcohol when the setting is consistent with the event's purpose, accessible alternatives are available, and minors and non-drinkers can participate safely. Alcohol shall not be required or used as an inducement to participate.

League funds shall not purchase alcohol unless specifically authorized for a legitimate event purpose and permitted by law, grant, venue, and tax rules. No person may perform League duties while impaired.

8.14 Accessibility and Inclusion Review

Before a major public event, the lead shall complete an accessibility and inclusion review addressing location, physical access, sensory access, language, cost, transportation, childcare or family participation where relevant, technology, timing, dietary needs, and respectful participation.

8.15 Partner and Co-Sponsor Volunteers

Partner volunteers working in a League-controlled activity shall receive the same applicable event, conduct, nonpartisan, data, and youth-safety rules as League volunteers. The League may accept a partner's equivalent training or screening when documented and adequate.

ARTICLE 9

Concerns, Corrective Action, Review, and Amendment

9.1 Purpose and Fair Process

The League shall respond to policy concerns promptly, proportionately, and as confidentially as circumstances allow. The objective is to protect participants and the organization, stop harmful conduct, correct systems, and provide fair notice and an opportunity to respond.

9.2 Reporting Concerns

A concern may be reported to the President, Vice President, Secretary, or another person designated by the Board. A report involving one of those persons may be made to another disinterested officer or directly to the Board.

Reports may be oral or written. The recipient shall create a factual written record when the concern may require follow-up. Anonymous reports may be considered, but anonymity may limit investigation or response.

9.3 Recusal and Intake

A person with a conflict, personal involvement, or close relationship to the matter shall not control the response. The Board may appoint a small review group, neutral League member, mediator, investigator, attorney, insurer, or outside professional.

9.4 Informal Resolution

When appropriate and safe, a concern may be resolved through clarification, apology, coaching, mediation, accommodation, restored access, correction of a record, or agreement about future conduct. Informal resolution is not required or binding for harassment, threats, serious conflicts, financial irregularity, youth safety, retaliation, or repeated conduct.

9.5 Review and Opportunity to Respond

Before a material adverse decision, the person affected shall ordinarily receive notice of the concern in sufficient detail to respond and a reasonable opportunity to provide information. The reviewer shall consider relevant records and witnesses and shall avoid unnecessary disclosure.

The standard for an internal policy finding is whether the available information shows that a violation more likely than not occurred, unless law, contract, or a specific policy requires a different standard.

9.6 Interim Protective Measures

Pending review, the President or Board may take temporary measures reasonably necessary for safety, records, finances, data, neutrality, or continuity. Measures may include changing supervision, limiting account access, pausing public communication, requiring two-person work, changing an event assignment, or excluding a person from a specific activity.

Interim measures are not findings and shall be reviewed promptly.

9.7 Corrective Measures Within Board Authority

Depending on severity, recurrence, impact, role, and Board authority, corrective measures may include:

- Education, coaching, clarification, apology, or corrective communication.
- Written expectations, warning, monitoring, or required training.
- Recusal, reassignment, supervision, or limitation of delegated authority.
- Correction or withdrawal of an unauthorized statement or commitment.
- Removal from a committee, chair, coordinator, student-affiliate leadership, or other appointed role.
- Suspension or revocation of access to League accounts, data, property, or a specific volunteer assignment.
- Exclusion from a particular event or activity when necessary for safety or orderly operation.
- Request for resignation from an elected office.

9.8 Limitations Concerning Elected Leaders and Membership

This Handbook does not create a power to remove an elected officer or director, terminate membership, or impose a sanction reserved to the membership, a higher League body, law, or the bylaws. Where serious conduct may warrant such action, the Board shall obtain appropriate guidance and use a lawful, fair process.

The Board retains authority to protect safety, systems, finances, communications, and specific assignments while the proper process is determined.

9.9 Written Outcome and Records

A material outcome shall be documented, including the policy involved, information considered, decision, corrective action, review date, and person responsible for follow-up. Conduct and incident records shall be stored in a restricted file, not in public minutes, except that the minutes shall record any formal Board action in a privacy-protective manner.

9.10 Anti-Retaliation

Retaliation for a good-faith report, participation in a review, request for accommodation, protected dissent, or refusal to violate policy is prohibited. A knowingly false or malicious report may itself be addressed, but an unsubstantiated report is not automatically false or improper.

9.11 Request for Reconsideration

A person subject to a material corrective measure may request Board reconsideration in writing within fourteen days, identifying a procedural error, significant new information, conflict, or disproportionate result. The Board may affirm, modify, remand, or reverse the decision. Interim safety measures may remain in effect.

9.12 Annual Review

The Board shall review the Handbook at least once each fiscal year and during the orientation of a newly seated Board. Review does not require readoption when no change is made. The Secretary shall record the review date.

The Board shall also review current conflict disclosures, nonpartisan restrictions, account access, insurance, records systems, volunteer screening, and the annual governance calendar.

9.13 Severability and Higher Authority

If a provision is invalid, unlawful, or inconsistent with a higher authority, the remaining provisions remain in effect. The Board shall suspend or interpret the affected provision narrowly and begin correction promptly.

9.14 Effective Date

This Handbook becomes effective on the date stated in the adopting motion. Existing leaders, committees, student affiliates, and volunteers shall receive the sections applicable to their work and a reasonable implementation period unless immediate compliance is required for safety, law, finances, nonpartisanship, or records protection.