**Green Party of Michigan**
**Handbook and Operations Manual**

March 16, 2019
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**Purpose**

The intent here is to define official duties and processes, and to define the mechanism for updating this document, frequently referred to as "The Handbook", so that that they may be debated, revised, and adopted at a future time.

This Handbook is, as it was originally devised, an auxiliary to the GP-MI By-Laws. Details were extracted to reduce the size and complexity of that document. We will ignore the number of redundancies and conflicting statements between the two for now, and look back at the By-Laws for editing after this Handbook version is completed and adopted.

## Revisions to the Handbook

Currently there is no specified process for formalizing revisions to this document. This is not unusual. The GP-MI By-laws and earlier versions of this document are generally bad: incomplete, conflicting and outdated. Various written statements and GP-MI traditions put responsibility for maintenance entirely upon one individual, e.g. the Communications Officer, while others state that each officer is responsible for certain sections. The latest version of the Handbook, which is undated but contains revisions dated to April, 2017, described itself as a "living document", with revisions adopted without a process. In order to protect it from contamination, though, it has been kept in a secure location that was inaccessible by anyone outside the leadership at that time. Most of the leaders couldn't remember how to find it.

Primarily, the Handbook contains definitions for processes and duties related to each officer. In light of this, we shall state the following:

**Each GP-MI officer is responsible for maintaining the section, or "chapter" of the Handbook that pertains to the office to which he/she has been elected.**

> **Revisions shall be adopted by a vote by the leadership prior to each SMM.**

> **A history of revisions shall be maintained on the GP-MI website, and will include a copy of every adopted version. These shall be available to the leadership for review.**

> **The Archivist shall be responsible for compiling revisions into the single Handbook document, prior to each SMM, and for maintaining the history of Handbook documents.**

## Official Duties and Procedures

Each GP-MI Office is listed below. Each includes a link to the corresponding "chapter" of the latest version of the Handbook, as well as a link to its chapter in this version of the Handbook.

**All GP-MI Officers shall cooperate and collaborate with all other GP-MI officers in respect for their positions, placing principles before personalities.**

**Officers shall upload all official documents and other electronic business files to the website for storage and access by other authorized users. Details for file upload and sharing processes are found on the website\*.**

**Where they exist, official email accounts will be used exclusively for all GP-MI business. Email will not be sent from or sent to personal email addresses when an official account exists\*.**

**Officers shall keep their personal profile information up to date on the GP-MI website. This includes personalized blurb regarding their view of the office and a headshot photograph.**

\*In accordance with the resolution reached at the February 24, 2018 SMM in Grand Rapids.

## Archivist

The previous version of this chapter is very short. It contained only four lines which were mainly questions about what the Archivist might actually do. The only actual statement was that the position used to be titled "Secretary". This revised chapter is an attempt at elaboration.

**The Archivist, as the title implies, will organize and maintain a historical library of all GP-MI business documents. This library shall be accessible by authorized officers and members via our website.**

**The Archivist is also responsible for the taking of minutes at each SMM and making those available for revision and adoption at the following SMM.**

## Chairperson

The previous version of this chapter began and ended with its title. The latest version of the Handbook only references the Chairperson in two other places, assigning the task of sending welcoming emails to new members, a job that has actually been done by the Membership Manager since at least 2016, and to "say hi to new folks".

In other organizations, the chairperson is charged with presiding over meetings. That has not been the case with the GP-MI, where the Meeting Manager typically begins and then possibly shares the tasks of facilitating meetings. Our By-laws assign other tasks to the chairperson, but these assignments conflict with responsibilities also allocated to the Media Committee, the Committee Chairperson, and the Communications Manager.

This chapter needs elaboration unless the office of Chairperson is to be deemed obsolete.

## Committee Manager

The previous version of this chapter also refers to the Committee Manager as the "Vice Chair", "SCC Chair", and "SCC Whip".

Committee Management responsibilities primarily involve managing access to Yahoo! Email Groups and files stored on Google Drives. Within the GP-MI context, "Committee" is synonymous with "Yahoo! Email Group".

Although not stated in the earlier Handbook version, the Committee Manager also typically utilizes Survey Monkey for decisions that require a vote.

This chapter needs elaboration that would include an account of the difficulties and impracticalities of conducting Green Party of Michigan business via free and insecure services such as Yahoo!, Google Drive, and Survey Monkey, and future plans given the inconsistencies with this and the resolutions made by unanimous vote at the February 24, 2018 SMM.

## Communications Manager

The [previous version](#) of this chapter is a very short list of things, such as "Website", "Blog", and "Other", with no other text.

In another area of the earlier Handbook we find a reference to the Communications Manager, allowing access to the membership list for emailing newsletter.

A very recent By-Laws change has assigned to the Communications Manager the responsibility of bringing the Handbook up to date. Along with this responsibility comes implied authority, since there is no mention of a process for formal adoption of changes to the Handbook. This, of course, is inconsistent with our Principle of Decentralization. It is also illogical to assign such a global task to a single person with other official duties.

This chapter needs enhancements in order to more accurately describe the duties of the Communications Manager, to align these duties with those assigned to other officers and committees, and to make it conform to our Ten Key Values.

## Elections Coordinator

The [previous version](#) of this chapter is a short outline.

The By-laws contain a generalized list of duties.

This chapter needs enhancements that specify in greater detail what and how the Elections Coordinator is to perform in office.

## Locals Liaison

The [previous version](#) of this chapter is a short list of incomplete sentences and ideas.

The By-laws contain a single sentence that describes the duties of this office.

It states that quarterly reports shall be entered into the state party records, but does not where say these records reside or how to access them.

This chapter needs enhancements that specify in greater detail what and how the Locals Liaison is to perform in office.

## Locals Rep At Large

The earlier Handbook version does not contain a reference to this position.

Our By-laws contains two sentences that describe the duties of this office, in very general terms.

This chapter needs enhancements that specify in greater detail what and how the Locals Rep At Large is to perform in office.

## Meeting Manager

The [previous version](#) of this chapter is substantial compared with many others, but contains many incomplete sentences and ideas and content that is outdated and inconsistent with other GP-MI documentation and practice.

For example, the Meeting Manager compiles the list of Officer Reports and Agenda Items prior to an SMM, but it's the Membership Manager who collaborates by sending out the actual meeting notices. The Meeting Manager does not have access to the membership list. This is confirmed in the previous version of the Membership Manager chapter.

Neither the earlier Handbook nor the By-laws clearly state how the SMM agenda is formalized. It may have been assumed that the Meeting Manager would assemble a "proposed" or "working" agenda, to be revised and adopted at the start of the meeting, which is the common practice with organizations outside the GP-MI, but that has not been the case. In fact, an acting Meeting Manager has stated that this is, "the most powerful position in the GP-MI" because the Meeting Manager decides the agenda. In spite of the fact that it conflicts with our democratic principles and Ten Key Values, the Meeting Manager has actually followed through with this claim.

This chapter needs enhancements that specify in greater detail what and how the Meeting Manager is to perform in office, in terms that are consistent with our other documents, practice, and principles.

## Membership Manager

The [previous version](#) of this chapter is the substantial. Although many of the details it describes are irrelevant today, it can be viewed as an example of what a complete job description should look like In general.

An updated version of this chapter follows here.

**MEMBERSHIP MANAGER,** Daniel Martin-Mills, last updated 2/5/2019

In this document, I will describe the duties and activities of the Membership Manager (MM) as I have experienced them, with the goal of preparing others who may consider assuming this position, and to help with the transition when a transfer occurs.

The MM is primarily responsible for responding to members and other officers regarding membership data. **Communication** has replaced data management as the primary responsibility.

**Note:** Membership data is not to be shared with any person or agency other than those GP-MI officers with authority, as specified by resolution at the [February 24, 2019 SMM in Grand Rapids](#).

Just two years ago, membership data was compiled and stored in disconnected spreadsheets that were then distributed via email. This was time consuming, insecure, and difficult to manage.

Now, data is managed on a server with a web user interface. People routinely join the GP-MI without any action by the MM, (after hitting the 'Join' button) and update their info without help, (after logging in). That said, we are always available for people who are keyboard and mouse avoidant. And maintaining and improving the integrity of the membership data will always be a part of this job description.

When someone joins or updates their data, the MM receives an automatic email. The member does not.

It is up to the MM to **welcome** the new member or to **confirm** the data change with a customized email that fits the purpose. Text templates are available to the MM for download from the server. The MM can add/update/replace these documents. Other relevant documents are also available from the server to be downloaded and attached or linked to from email. I generally attach our by-laws and the 'There is a Difference' graphic file to my welcoming emails.

**Note:** All email from the MM is sent via the official GP-MI account: [membership@migreenparty.org](mailto:membership@migreenparty.org), in accordance with the resolution at the [February 24, 2018 SMM in Grand Rapids](#), and for many practical reasons.

Personal email accounts are not to be used by the MM for anything even tangentially related to the GP-MI MM.

As MM I have handled the technicalities of launching **bulk email** to the membership, to announce details of upcoming SMM and other points of general interest. This responsibility was given to me by Rita Jacobs, our previous MM. It was very arduous and time-consuming work just two years ago, when all we had were spreadsheets and a free Yahoo! account. Currently, the process is much faster, but it does require special attention to details. It will take a little coaching and some practice to achieve the desired outcome. While other GP-MI officers have

composed and launched bulk email, the results were less than ideal, in some cases bothering people who had asked repeatedly to be left off the list, and missing new members. It makes sense for this to be done by someone with experience, and for that person to be the MM because the membership list is the central concern of this office.

It is customary to work with the Treasurer on **U.S. Mail** solicitations, as specified in the by-laws. To date, my only involvement with this process has been to provide an up to date address list, and then to modify the list when mail is returned. Paul Homeniuk was the last MM to edit this "Handbook"  job description. He included details for sending an effective solicitation. I have included his text as an **appendix** to this document and made his old job description available for **reference**. You will also find a text template on the server.

The MM has a special role **at the SMM**. I always prepare two membership lists before the meeting with the column for "Date Joined" included. With the help of others, we check people in before/during the meetings. Members who have been with us 60 days or more are given a green voting card. Otherwise, they get a white one, to be used if consensus allows them to vote.

We also maintain a sign-in list that has never been used by anyone for any reason. People expect to sign in, though. We do not disappoint them.

We also provide stick-on name tags. And we make sure to bring pens and markers, paper, extension cords, and anything else we think might be helpful.

The SMM and nominating convention are good times to solicit new members. For this, I keep a laptop and smart phone on the ready. We also keep paper forms on hand, but when they are used, we make doubly sure we can read what's been written on them. Data on the paper forms needs to be keyed into the Join page for it to become official. Anyone can do this without logging in.

Finally, I'll note that the MM is expected to submit a report prior to each SMM, to be included in "the packet" that is linked to bulk email that is scheduled to be launched one month prior to each meeting. I used Paul Homeniuk's last report as a template, although reports form other officers make it clear that format is not an issue.

You will notice that recruiting new members is not listed as a job responsibility for this position. That may seem like a mistake, but it is not. On the other hand, there is nothing to prevent the MM from recruiting new members! In fact, the MM is welcome to engage in any activity that will benefit the GP-MI, if it is done in harmony with the other officers and members. This can be ascertained by communicating with them in advance.

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**Merchandise (and Office) Manager**

The previous version of this chapter is a short list of words such as "hats" and "buttons", along with a stated duty to pass mail to the Membership Manager.

The By-laws state that the Merchandise Manager, ("Office" is omitted from the title) shall maintain a budget and share it with the Treasurer. This prudence would be expected in a role that deals with money payments for merchandise, but it actually conflicts with GP-MI practice. Our treasurer does not receive records from the Merchandise Manager.

This chapter needs enhancements in order to more accurately describe the duties of the Merchandise Manager, and to make it conform to actual GP-MI practice.


**Treasurer**

The previous version of this chapter consists of two short paragraphs. At least one of them is irrelevant today.

The By-laws contain one sentence that describes the office duties in general terms.

This chapter needs enhancements that specify in greater detail what and how the Treasurer is to perform in office.


**Web Steward**

"Web Steward" is a term that Ellis Boal proposed at the February 24, 2019 SMM in Grand Rapids, as an alternative to the familiar but outdated term for a person who designs and maintains a website. The main objection at that time was the connotations with the stem in the compound word, which is "master". "Steward" was gender neutral and seemed to imply service rather than power and control.

The points are well taken, but there are more concrete issues with the concept of "a person who designs and maintains" our GP-MI web application, regardless of the post's title. The job is too big and too important for one person alone. The GP-MI is a growing enterprise. It's large and complex now, but things should get even more involved in the future.

Content, resource, and data management must be handled by the various offices and members themselves. This is already being done. For example, people can become GP-MI members without having to wait for an officer to respond to an email. This greatly increases efficiency because work that was done in isolation and then copied or lost can now be persisted to our shared server without redundancy.

But when party officials are absent for any reason, we need someone on hand who is ready and able to step in as required. A survey of the tasks this person might be called on to perform makes it clear that several people will be required to share this responsibility. The tasks include:

- Respond to help requests by officers and members.

- Distribute electronic resource files to specific locations for the various officers, for GP-MI members, and for the public.

- Manage file resources from officers who are absent.

- Manage application Users and Roles definitions and assignments.

- Manage Office/Delegate data and Officer/Delegate assignments.

- Manage Committee data including committee definitions and member assignments.

- Manage GP-MI member data

- Manage Locals data.

- Manage the Treasurer's data, including donations and contributions.

- Manage Communications data including political candidates and GP-MI site contact Information.

- Manage chairperson data, including Nominations

- Manage Meeting notifications details and marketing email

- Manage articles written to the site.

- Manage official email accounts and their use

- Manage domain name registration

- Manage databases including credentialing and backup

- Manage FTP permissions and backup

- Manage hosting accounts

- Identify and plan for site improvements

- Communicate/collaborate with all officers, site users, and with software developer.

In other words, those in the Web Steward role are authorized to do anything within the application and its data and file resources, our email, and our hosting account. For this reason, the most important prerequisite for this post is trust.

Communication, coordination, and collaboration are essential, but if trust is lost, the position must be lost as well - immediately.

Trust is not lost by making a mistake. Trust is lost by being deceptive. Trust is lost by being indifferent to members who have questions or concerns. Trust is lost by failing to observe the serious nature of this position. Trust is lost when this position is viewed as a post of power and privilege, rather than one of responsibility and conviction.

It is very difficult to remove a person from this position without damage to the organization. Therefore, we must be as confident as we can be in the people we consider assigning to the role of Web Steward before 'handing them the keys'.

Currently, (February, 2019) we have six people with "admin" status, giving us six de facto Web Stewards. I have admin status because as the software developer. I need it to be able to test what I develop. But I should spend my time developing software, not managing the application.

I have relied on others with admin status to suggest, discuss, test, and review feature version releases. I have made no decisions on my own. I listen to feedback from anyone, but someone with admin status is free to assume any office or role on the site. This helps me get independent evaluation without scheduling communications with a large number of people. I have also welcomed the content management work by others with admin status, although I have only recently started to delegate this work.

In the near future I will be expecting those designated Web Steward status and all other officers to take their share of content management.

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## National Delegates / Alternate Delegates

The [previous version](#) of this chapter contains only its title.

This chapter needs enhancements that specify in greater detail what and how National Delegates and Alternate Delegates are to perform in office.

## GP-US Committees

The [previous version](#) of this chapter contains only an incomplete list of committee names.

This chapter needs enhancements that specify in greater detail what and how each of the GP-US Committee members is to perform in office.