Democratic Rural Conference of New York State
Bill Thickstun, Chair
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Handbook for County Chairs

Congratulations on being elected Democratic County Chair! You hold one of the most important positions in the party. The work will be rewarding on some days, frustrating on others, but always interesting.

Audience

This Handbook is designed for new county chairs in the NYS Democratic Rural Conference, which includes the 47 New York counties with populations of 250,000 or fewer. Continuing and aspiring chairs in those counties might also find it useful. In larger counties, the role of county chair tends to be significantly different and falls beyond the scope of this document.

Role of the Chair

Even within the DRC counties, the work of a county chair varies considerably depending on the county's size, party bylaws, and local traditions. In all cases, however, the chair is the county party's chief executive officer and is ultimately responsible for at least these general tasks:

1) Recruiting committee members and candidates for office,

2) Organizing the petition effort to get candidates on the ballot,

3) Fundraising to support candidates and party operations,

4) Managing the committee's communications and administration.

This handbook covers many topics that you won't be able to handle immediately, but don't let that overwhelm you. Keep your eye on the committee's primary goals and learn the rest as circumstances arise.

Many of us have been doing this work for twenty years and still learn new things every day. This handbook is an attempt to provide a reference for things that we all wish we had learned sooner. Much of the discussion summarizes or expands on NYS Election Law, which you can find here: https://elections.ny.gov/election-law. Party committee organization is covered right up front in Section 2.

Sample Annual County Chair Calendar

November/December
Advertise and recruit candidates for office as needed
Schedule candidates for screening
Attend holiday parties

January
Hold candidate screenings
Hold county meeting to vote on endorsements
Work with chairs in counties that share assembly districts on judicial delegate list
Revise judicial delegate list and contact delegates about serving
Revise state committee list, contact members/prospective members (even years)
Be sure that treasurer files the January periodic state finance report

February
Work with Secretary of Record to prepare petitions for candidates
Solicit vacancy committee lists from candidates who don't provide them
Hold county meeting to distribute petition packets
Start of petitioning, last week of the month

March

Send out petitioning reminder emails as petition period progresses
Participate in petitioning
Send out petition turn-in email
Work session to vet, number, punch and book up judicial petitions
Copy judicial petitions and mail or courier to Albany BOE
Assist candidates with petition filings

April

Official petition turn in at BOE
Monitor candidate petition challenges
Challenge opposition petitions as needed
Put a subcommittee together to help with the county fundraiser
Find a speaker and plan the event
Attend DRC Conference

May

Send out fundraiser invitations
Call prospective donors and sponsors

June

Hold fundraising event
Primary election
Meet with finance committee to determine initial candidate funding grants
Remind town chairs of caucus nomination deadline

July

Attend primary re-canvasses as needed
Attend town caucus meetings as needed
Send thank-you notes to fundraiser donors
Be sure the treasurer files the July periodic state finance report

August

Call judicial delegates and alternates to attend judicial convention
Attend judicial convention

September

In reorganization years

Send notice of reorganization meeting
Speak with prospective vice-chair, secretary, treasurer
Write and call all committee members to request their support
Hold reorganization meeting
Appoint county attorney, parliamentarian, finance committee
Send election results to County and State BOE (signed by secretary)
Send Commissioner of Elections nomination to county board clerk

October

Notify committee of candidate GOTV opportunities
Participate in GOTV work
Organize distribution of early voting lists to candidates

November

Election Day
Attend re-canvasses as needed

ONGOING TASKS

County Meetings

Set dates for county meetings, reserve venue, email out 10-day notices
Direct secretary of record to send out mailed notices (for members with no emails)
Email meeting reminder two days before meetings
Prepare meeting agendas, email to secretary in advance
Print around 25 copies full committee agenda, around 15 exec agenda
Contact secretary to bring copies of minutes
Contact treasurer to bring copies of treasurer's report
Preside at meetings
Review meeting minutes with secretary and email out when ready

Committee Organization

Attend town, ward and city meetings when possible
Arbitrate differences within town and city committees
Press town, ward and city chairs to fill committee vacancies
Keep list of prospective members for appointment
Contact prospective members as needed and discuss committee responsibilities
Solicit phone numbers and email addresses for committee members

Coordinate placement of new members with town, ward and city chairs
Keep committee list synchronized with Secretary of Record

Candidates and Elected Officials

Meet with and cultivate prospective candidates
Act as committee liaison with elected officials and candidates
Meet with representatives of statewide office as needed
Attend when statewide officials visit area
Attend candidate fundraisers whenever possible

Communication

Respond to calls and emails
Maintain email lists and update addresses that bounce, or delegate to secretary
Email event notices received from candidates and officials to committee
Forward notices regarding endorsements and events to candidates

Media and Public Relations

Pass along notices as appropriate to Facebook page admin
Maintain County Web site or delegate
Maintain Events Calendar or delegate
Write and send out press releases as needed
Respond to media inquiries
Act as liaison with allied groups (IMV, Women's Dem Club, etc.)
Maintain working relationships with chairs of other parties and counties

Fundraising

Maintain fundraising list
Develop relationships with union leaders
Attend union fundraisers when invited
Schedule and attend meetings with prospective donors

State Committee

Travel to state committee meetings
Solicit attendance or proxies from your state committee members
Review state committee materials ahead of meetings
Travel to DRC conference in April
Respond to requests from the Governor's office and State Committee Chair

Board of Elections

Meet with Democratic commissioner periodically to review operations
Intervene at BOE as needed when issues arise
Annual review of commissioner's performance
Advertise when commissioner position is vacant
Appoint and convene commissioner search committee
Solicit commissioner applications and review
Appoint or reappoint commissioner (even years, or every four)

Jobs (mostly obsolete)

Email job notices received from appointments in Albany to committee
Look up voter records for resumes received
Consider resume qualifications and compare candidates if needed
Forward resumes to appointments as appropriate
Follow-up with appointments office and recommenders as needed

Bylaws

Review bylaws every few years
Appoint and convene bylaws revision committee as needed
Mail revisions to committee ahead of meeting

Party Structure

The smallest unit of political organization is an election district (ED), known in some states as precincts. Voters in an election district vote at a common polling location, with multiple election districts sometimes combined at one location. Cities and large towns in New York are further subdivided into collections of districts called wards.

County committee members represent voting districts, most often two committee seats per district. Town and city committees are subcommittees of county committees, so all town and city committee members are also county committee members. Committees at all levels may also choose to welcome volunteers to their meetings and encourage them to help with events and other activities.

Each assembly district within a county elects two state committee members of different genders. State committee members represent the part of their assembly

district that falls within their county. Some rural counties have only part of one assembly district, some have parts of more than one, and a few have an assembly district wholly within their county.

A county divided between two assembly districts will have four state committee seats, one divided among three assembly districts will have six, and so on. Under state election law, state committee members exercise weighted votes in proportion to the most recent number of Democratic votes for Governor or President in their districts.

The system ensures that a handful of voters in a small district don't carry the same weight as a large number in a big district. Routine matters (for example, the approval of meeting minutes) don't require weighted votes. Weighted votes are required for the election of party officers and the endorsement or nomination of candidates, when not unanimous.

Similar rules apply to county committee votes, except in a county (such as Tioga) where the number of committee seats per district is set by the county bylaws as a proportion of the votes in that district for governor or president. Making the number of committee seats in a district proportional to Democratic turnout largely eliminates the practice of committee members taking higher weighted vote districts where they do not live. But in all cases, bylaws must provide a voting system ensuring that all voters get equal representation.

Your Board of Elections should be able to provide weighted votes by district for your committee.

The Petition Process

Every two years, county committee members petition for their own seats—an even year process in some counties, an odd year process in others. A committee petition requires signatures from at least 5% of the Democratic voters in the election district. If a county has two committee seats per district, and more than two people file valid petitions, the committee candidates appear on the primary ballot for voters to choose from.

Committee primaries are rarely necessary in rural counties. If a prospective member lives in a district with two continuing members, there's usually a vacant seat in a

nearby district that they can represent. A committee member can serve in any seat that's within both their county and their assembly district.

In Oneida County, the second largest in the DRC, the average minimum number of signatures required on a committee petition is 12. Most people already know 12 Democrats in their neighborhoods. If they don't, turning up at their doors with petitions is a great way to meet them and get them connected with the party.

Petitioning therefore would not be difficult work, except that committee members also carry petitions for all their Democratic candidates. Candidates for elected office, whose districts contain many election districts, must generally meet the same 5% minimum. If all committee seats were full, it would be enough for everybody to get just a few signatures above their minimum on the whole petition set every year. But because most rural counties have so many vacant seats, those of us who do the work must do more than our 5% share to get our candidates on the ballot.

Committee members representing the same election district can have their names at the top of the same petition. That way each needs to get fewer signatures in total on the committee petition. You can also keep elderly and disabled members who are not able to walk their districts on the committee by putting them on the same petition with someone who can. But because there's no similar way to reduce signature requirements for candidates, many of us do not encourage committee members to combine their own petitions. In some cases, that can result in members getting many fewer signatures on the whole petition set.

The state legislature has created several exceptions to the 5% rule. County-wide and State Senate candidate petitions are capped at 1,000 signatures. Assembly candidate petitions are capped at 500. State committee petitions are capped at 500 or at 5% of the part of the assembly district in their county, whichever is smaller.

Petitioning was easier in rural counties when petition season was in June. With petitioning in March, the weather can be challenging, it gets dark earlier, and families are unlikely to be out in their yards. Since the pandemic, people are less likely to open their doors to strangers with clipboards. In rural areas, it's usually necessary to put significant mileage on your car to get from house to house. Petitioners encounter ice, snow, dogs, fences, and sometimes hostility from voters who have changed parties in spirit if not in name. For all these reasons, the DRC

remains committed to finding viable alternatives to petitioning or reductions in signature requirements.

The petition process remains, however, one of the few parts of the political system that's not controlled by big money. For Congress and sometimes at the state legislative level, candidates can afford to hire paid petitioners. But at the local level, the work is all done by committee people and the candidates themselves. Paid petitioners are statistically less successful and usually aren't interested in getting signers connected in a more general way with the party.

Statewide candidates for Governor, Attorney General, Comptroller and US Senate are nominated at a state convention. Sometimes a candidate who doesn't receive 25% or more of the convention vote will seek the 15,000 petition signatures required to stay in a statewide race and appear on the ballot. Committee members can choose to carry such petitions, but they need to get them directly from the candidate's campaign. Statewide petitions are not your responsibility.

Presidential primary petitions are circulated every four years in January. If you're a county that endorses candidates (see section on Endorsements below), you might choose to print and distribute to your members petitions for your endorsed presidential candidate. More often, presidential petitioning is a personal choice by committee members, who can request petitions directly from the campaigns.

Judicial Delegates

The highest court in New York is the Court of Appeals. The second highest is the Supreme Court, which is organized by regional districts. Candidates for Supreme Court are elected but are not directly named on petitions. Instead, committees petition for slates of judicial delegates and alternates, who convene regionally in August to nominate judicial candidates to the ballot.

Unlike all other petitions, these need to be carried every year, even when no apparent vacancies on the court exist and no candidates have emerged. That's because judges can resign or die unexpectedly. In some years new judicial positions have been created by the legislature during their spring session, after petitioning season in March.

Judicial petitions are the hardest to get committee members to carry and voters to sign because their purpose is so obscure. But without a quorum of delegates, a convention is unable to nominate any Supreme Court candidates in the region. It's important to run Democrats even in areas where it's hard. While judges are supposed to be impartial, we all know of cases where the party affiliation of the judge likely made a difference in the outcome.

Judicial delegate slates are constructed by assembly district, but unlike state committee seats, they do not stop at county lines. So putting together a judicial delegate petition requires that you coordinate with the other county chairs in each assembly district. Each petition requires 500 signatures, the same as for an assembly candidate. For many committees, these petitions are our toughest lift.

Because the exact date of the convention is unknown when petitions are put together in February, it's important to have as many alternates as delegates on the petition. Experience has shown that all alternates who are available should plan to attend the convention. A handful may not be seated, but most will, because of delegates who find they can't attend, sometimes at the last minute.

In 2008 a challenge to this system made it all the way to the US Supreme Court, which declined to overturn it. In his concurrence, Justice John Paul Stevens said that just because a law is stupid doesn't make it unconstitutional.

Party Calls

In February the state party puts out a Party Call to all county chairs specifying the number of judicial delegates and alternates for each assembly district. Except in years following redistricting, these numbers rarely change.

Most chairs begin the work of updating judicial petitions in January. One county in each assembly district usually takes the lead in building and producing that district's petitions. Ideally, you want to try to include delegates and alternates in numbers proportionate to each county’s share of the district. It's good practice to call people from the previous year's petition and ask if they're willing to serve again. It's also a good idea to drop people who never seem able to attend the judicial convention.

There's a similar party call in even years for state committee members, but these numbers never change except after redistricting.

Petition Production

Many of us can remember a time when packets of petitions for committee members were printed and prepared at our county boards of election. The state BOE has been discouraging this practice for at least 20 years, though it's not technically illegal. Most of us, however, now print petitions and produce petition packets out of the BOE office at the committee's expense. You may also want to buy (or save from year to year if possible) legal-size envelopes to hold each member's petition set.

PDF templates for constructing petitions should be available from your Board of Elections or can be downloaded at the state BOE web site. Congressional candidates, who have paid staff, generally create and provide their own petitions to county committees. State legislative candidates also often produce their own, but petitions at the county level and below are your responsibility. It's essential that the candidate's name, address, and the date of the election at the top of all petitions be correct.

For most petitions you should also build a vacancy committee. Should the candidate suddenly become unable to run for any reason between the time you create the petition and the ballot printing date, the vacancy committee can designate another candidate to run without needing to petition again. A vacancy committee can also be built with an eye to the endorsement value of the names that appear there. For a congressional petition or state leg petition, it's often the county chairs in the district.

If a candidate dies after petitioning and has no vacancy committee on the petition, it may still be possible to substitute another candidate. But the rules are complex and the timeframe is usually extremely short. In this scenario, consult your Board of Elections immediately. It's much easier just to always have a vacancy committee on the petition already authorized to act.

What you can still expect from your BOE is a printed walking list of voters for each district, sorted by party and street address. It's reasonable for the BOE to limit printing costs by producing lists only where committee seats are not vacant, with

occasional follow-up lists for new committee members recruited during petition season.

Some committees are now using MiniVAN (Votebuilder) on their phones in place of walking lists. In areas with poor cell service, the list can be downloaded to the phone in advance and results synced up with the database later. The system saves paper but requires someone to set up VAN turfs by ED.

Using MiniVAN can be a force-multiplier. The auto-sync between your phone and the Votebuilder database (in areas with good cell service) allows multiple people to work a list without knocking on the same doors multiple times. It also allows campaigns to access information on voters who have already been petitioned in real time, without the need for someone to do data entry separately. In addition, you can check which EDs are not being reached and recruit volunteers to go to those areas. The VAN and MiniVAN are discussed in more detail below.

A petition packet should include the petitions for all candidates running in the election district, the walking list or MiniVAN list number, and a sheet of instructions. In alternate years include a petition for the committee member's own seat. Some counties fill these out for committee members; others provide a blank petition for committee members to fill out themselves.

You can find sample petitions and related forms at
https://elections.ny.gov/petition-information

Petition Training

The county committee should provide petition training every year, either at a regular committee meeting or in a special session. New members will always need to attend, and continuing members often benefit from a refresher.

A sample document with notes for petition training is available here:
https://drive.google.com/file/d/1-p8wXUVZydwgNwtqLFnOSeKydSn6PV6u/view?usp=sharing

Petition Turn-In, Correcting and Filing

Be sure to set petition turn-in deadlines for your committee members well ahead of the official ones. Once petitions start to come in, worried candidates will be calling you to see how their numbers are coming along. An early turn-in deadline gives you time to make up any deficits. It also gives you time to correct errors in the petitions. Committee members should return petitions to you, not to the BOE. Once they're filed there, errors cannot be corrected.

You need either to review all petitions yourself or to delegate that review to a team. If anyone on your committee has proofreading experience, they should be on the team. Many errors are fixable. The most common is finding village and postal address cities in the right-hand column, rather than the town name. The dates for each voter's signature must also be consecutive top to bottom. Draw a line through the error, correct it, and label the change with the witness's initials.

In the witness section, the date next to the signature must be equal to or later than the last date a voter signed. Sometimes the number of signatures on the petition isn't filled out, sometimes the town the witness lives in is wrong or missing, sometimes the county is missing. Errors in the top section invalidate only the line on which they occur, but errors in the witness section invalidate the whole sheet.

All information in the bottom section is about the witness, who could be from somewhere other than where the signatures were collected. Any Democrat registered in New York state can circulate petitions in your county. For example, congressional staffers from far afield may turn up as witnesses in your petition sets.

You should return congressional petitions to the campaign, which will bind them with petitions from other counties. Candidates for state legislature also typically collect petitions from you to bind and file.

Once petitions have been corrected, they need to be fastened together. Find out whether your BOE prefers a paper clip or a two-hole punch and prong fasteners. Petitions with over ten sheets require a cover sheet on top. Finally, number them at the bottom of each sheet. Save this step for last, as errors in numbering can invalidate the whole bound volume.

Petitions for any district that's wholly contained within your county are filed at your local Board of Elections. Petitions for districts that cross county lines need to be

filed in Albany. That rule applies to almost all judicial petitions. Getting those volumes to the BOE in Albany by the deadline is your responsibility—another reason why you want to set early deadlines for your committee. Some counties drive them to Albany; some use certified express mail.

A cover sheet template is available here: https://elections.ny.gov/system/files/documents/2023/11/coversheetdesignatingindependentcombined.pdf

Caucus Towns

Many towns in rural New York are caucus towns. Town candidates are nominated to the ballot not by petitioning, but by party voters at a caucus meeting. The town committee puts out required public notices inviting all members of the party in town to attend, holds the caucus, tallies the votes, completes the nomination paperwork, and files it with the County Board of Elections.

It's easier than petitioning. But a caucus is more vulnerable to being hijacked by disaffected members of the party. A caucus vote has nothing to do with issues or character. It depends entirely on how many supporters a candidate can turn out for the caucus.

Caucusing doesn't save the committee from having to petition, since petitioning is required for the county and state committees, judicial delegates and alternates, and all offices at the county level and above. Nominating town candidates by caucus does reduce the number of petitions you need to get the voters to sign.

There's a process to change a caucus town to a petition town and vice versa. In some towns, one party nominates by caucus and the other by petition. Since a caucus can be held after the petition period is over, most towns find it easier to wait until petitioning is done to publicize and hold a caucus. That also means you can continue trying to recruit town candidates through the spring and early summer instead needing to have them in place by February.

A caucus nomination form is available here: https://drive.google.com/file/d/1_SGJcMGWGZLdcUOhX-vQ_s4xSE-YvFC0/view?usp=sharing

Committee Reorganization Meeting

Under state election law, the county committee must hold a reorganization meeting between September 17 and October 6 during the year in which they petition for committee seats. Some counties petition and reorganize in even years, some in odd years, as specified in their bylaws. The county chair and other officers are elected or re-elected at this meeting.

To vote at the reorganization meeting, members must have filed committee petitions in the spring. No appointed members may vote. This prevents a candidate from stuffing the committee with supporters at the last minute. If you want to build support for a bid to be county chair, you need to encourage your supporters to petition onto the committee in February.

Because there's now a long lame duck period between petition filing and the September reorganization period, many committees accumulate lists of prospective committee members over the summer. Members may be appointed by the committee immediately after the reorganization portion of the September meeting and at any subsequent county meeting prior to the next petition period for committee seats in two years.

If you're running for election or re-election as county chair, it's good practice to request the petition list from your Board of Elections and send a letter to committee members at your own expense. You should at least call all committee members ahead of the meeting. These calls may reveal that your candidacy is in trouble, but you should never be surprised by the result of a committee election. No matter how large your county, the number of committee members you need to ask for support is quite small compared to the number of voters who need to be reached in any election for public office, so there's no reason not to make the effort. Most committee members will appreciate you for reaching out to them. You may also get useful feedback on the committee's work while making these calls.

A contested county chair election must be by weighted vote, unless your bylaws provide for the proportional election of committee members in the primary, as discussed above under Party Structure. The only other required positions are County Secretary and Treasurer. Many counties also elect at least a Vice Chair, and in most counties the officers run together on a slate, as it's important that you as Chair have officers you're comfortable working with. At the time of their election,

officers (including the Chair) don't have to be committee members who petitioned onto the committee, but if they're not, they can't vote.

Within 3 days of the reorganization meeting a formal notice of the election of county officers including their addresses must be sent to both the local BOE and the NYSBOE. The notice is signed by the county committee secretary.

Commissioner of Elections

Every county Board of Elections is run by two commissioners, one Democratic and the other Republican. It's a reasonably good system for ensuring fair elections, as they must learn to work together while also watching each other like hawks. Your commissioner is selected by you and your county committee. It's the most important appointment you will make.

The demands of the position have increased dramatically over the years. Election Commissioners need to deal effectively with the public, with candidates, and with party officials, particularly you. They need to be able to manage office staff and to recruit and train an army of workers to staff polling places on election day. They need to learn all the various computer systems used in the office, even if just to be able to train employees. They need to have a good eye for detail in constructing ballots and responding to petition challenges. They must be committed to running fair elections, but they're also responsible for looking after the party's interests to the extent allowable by law.

The only requirement in Election Law for the position is that the candidate be registered to vote as a Democrat in your county. A summary of one county's additional criteria for the job appears at https://drive.google.com/file/d/1GdTv7ELjvitLb5z8y9ajWJCnkHS2lVZl/view?usp=sharing

Because the Election Commissioner is usually the best remaining patronage job in your county, you may be besieged by party loyalists who feel entitled to the position when it comes open. It's important that you construct a fair process for filling the job. In some counties the entire committee interviews candidates, in some counties the executive committee, and in others it's delegated in the bylaws to a smaller subcommittee. You need to be prepared to deal tactfully with unsuccessful candidates, as you need them to remain engaged with the party.

In some counties the commissioners serve two-year terms, in some four. After the fall reorganization meeting in years when the commissioner's term is up, but no later than December 1, the county chair sends the party's nominee for the position to the clerk of the county legislature or board of supervisors. Traditionally the entire legislative board honors the choice of each party for their own commissioner. Like many norms in our political system, however, this one is now under threat from the other party, particularly in counties where they have overwhelming majorities on the county board. As chair, it's your job to line up your own party's representatives on the board behind the committee's choice. If the board as a whole rejects your choice, they can't substitute their own. They can only wait for you to send them another name. One DRC county recently went through three candidates and a court case before they got a commissioner appointed.

Similar rules apply for vacancies that arise before the end of the Commissioner's term.

A sample Commissioner of Elections recommendation form is available at this link: https://drive.google.com/file/d/1i4Ans---RckuHcWwcfl4G_tLJMI2uTbB/view?usp=sharing

Endorsements

When multiple candidates are seeking the same elective office, you face a decision about whether to endorse one over another ahead of the primary. Some counties don't endorse primary candidates on principle. Endorsements can make it harder for the party to come back together later and support the primary winner, particularly if the endorsed candidate doesn't win.

Other counties take the view that providing guidance to voters is part of the committee's job. We've met the candidates—in most cases, we've interviewed them, thought about their resumes, and often gotten to know them over an extended period. Just as endorsements from unions and other trusted organizations can help voters decide whom to vote for, the party's recommendation may be helpful.

Based on differing candidates and circumstances, the party can also decide to endorse in some cases and not in others. In most counties, the endorsed

candidate's petitions get included in petition packets, while other candidates must distribute petitions to committee members on their own. But in any case, an individual committee member can choose to circulate petitions for any primary candidate, whether or not their candidate is the one endorsed by the committee. In a race where the committee votes not to endorse, the chair can and should allow all candidates for the position to distribute petitions at the meeting where petition packets are distributed.

It's not illegal for a committee member to circulate and witness petitions for multiple candidates running for the same office. But if they do, it is illegal for them to sign in the top section for any candidate in the race. It can be particularly confusing for voters when a committee member shows up at the door and offers a choice between two petitions to sign for the same contest. Most voters will not have met either candidate. It's part of a committee member's job to offer voters some guidance on this question, even if both candidates seem strong.

All endorsements must be conducted by weighted vote, except in counties where committee representation is proportional (see Party Structure above), and except where the initial vote is unanimous. Only committee members representing election districts in the district where the candidate is running may participate in endorsement votes. So, for example, if an Assembly district takes in 5 out of 12 towns in your county, only members from those 5 towns can vote on the endorsement.

After the primary is over, election law does not permit committee members to support a defeated primary candidate who may remain in the race on another ballot line. The decision of the voters is final. Continuing to work for, or support financially, a candidate running against the Democratic primary winner would provide grounds for dismissal from the committee.

You need to make it clear to disappointed committee members that if they wish to do this, they need to resign their committee seats. After the general election, if a committee majority is in a forgiving mood, you can vote to reappoint them. The alternative is that you may need to field charges for dismissal against these members from supporters of the winning primary candidate. Such battles are always divisive, so you should do everything you possibly can to avoid them.

Endorsing Candidates from Other Parties

From time to time you may be approached by a member of another party who would like to run on the Democratic line. In these cases the party must decide whether to endorse, as the candidate can have the line only with our permission. You might, for example, have no Democrat running and have a Working Families party member who is interested in the race. If the committee votes to endorse (according to the rules outlined above), you as Chair then need to file a Certificate of Nomination form (also called a Wilson-Pakula) granting them access to the line. They also need to file a Certificate of Acceptance, confirming that they will take it.

After that, they will still need to get the required number of petition signatures for the race, but of course it will help considerably if they have your committee people carrying petitions for them. To circulate Democratic petitions personally, a candidate of another party needs to either be a notary (or, in a city, Commissioner of Deeds), or walk with one.

In certain extraordinary circumstances a committee might decide to cross-endorse a Republican candidate. Most of us would do this only if we have no viable Democratic candidate for the seat and the Republican candidate has 1) pledged to change their registration to Democratic at the first opportunity, or 2) the Republican party has agreed to cross-endorse one of our candidates in another race. Democratic county chairs should not grant our line to a Republican without receiving something in exchange.

Progressives are often suspicious of Republicans who change parties to run for office, sometimes justifiably. You should approach this situation warily and apply special scrutiny to the candidate. But if the party change is a sincere one, it's a win-win for us. We reduce their numbers and increase ours by 1 at the same time. And a willingness to appear on our line also sends a message to the candidate's friends that the candidate views the Democratic party positively. That can be helpful in shifting opinion in your town or county, especially when the candidate is a well-respected community member.

A town caucus can also nominate a candidate of another party. In that case the caucus nomination form (see above) plus the Certificate of Acceptance constitutes a Wilson-Pakula. Here are links for Nomination and Acceptance forms: https://elections.ny.gov/system/files/documents/2023/11/sample-certificate-of-authorization.pdf

https://elections.ny.gov/system/files/documents/2023/11/sample-certificate-of-acceptance-6-146.pdf

Other Ballot Lines

In rural counties, most Republican candidates can count on having the Conservative ballot line in addition to their own. Democrats used to be able to pick up that line occasionally, but with increasing party polarization it's become very infrequent. In rural county cities, as in big cities, the Working Families Party line can be very helpful. But in deep red rural areas it can actually be damaging, as people have now figured out that the WFP is to the left of the Democrats.

The most useful additional ballot line for Democrats is an independent line. The candidate (or candidates) make up their own party name to reflect values they hold and share with voters in the district. Independent petitions are circulated during a whole second petition period in April and May. The signature requirements are double the numbers for party petitions. But any member of any party (as well as unaffiliated voters) can sign these, as long as they haven't already signed a party petition for a candidate in the race.

Independent petitions are a heavy lift for any candidate, particularly as committee members may be weary after the first round of petitioning for the party line. But you may want to encourage your committee to carry these. Some people will never vote for a candidate on the Democratic line but can be persuaded to vote for them on an independent line with an appealing name.

Nominations

In extremely rare circumstances, a county committee is permitted to nominate a candidate directly to the ballot, without either petitioning or a primary. Typically these situations arise when a vacancy occurs after petition period but before the ballot printing deadline. As with party officer elections and endorsements, nominations must be made by weighted vote unless the committee is structured with proportional representation. Also as with endorsements, only committee members from the district where the candidate is running may vote, unless the county bylaws provide some other method—perhaps an executive committee vote—for this situation.

County Bylaws

Rules governing your committee that are not specified in state election law are covered by your own bylaws, which should be on file at your county Board of Elections. Bylaws vary considerably from county to county. Topics generally included:

1) Number of committee members per election district

2) Party offices and whether they are elected or appointed. Election Law requires a Chair, Secretary, Treasurer, and Commissioner of Elections. You may also have an Executive/First Vice Chair, Second Vice Chair (sometimes for Towns), Parliamentarian, County Attorney, and so on

3) Duties of officers

4) Procedures for filling officer and committee vacancies

5) Composition and authority of an Executive Committee, if any

6) Frequency of county meetings

7) Notification and quorum requirements for meetings

8) Rules and procedures for endorsements

9) Rules and procedures for removing committee members

10) Rules about proxy voting (including whether it's allowed)

11) Procedures for amending the bylaws

In all cases where the county bylaws conflict with state election law, election law rules. For parliamentary issues not covered by either document, bylaws usually refer to Robert's Rules of Order.

It's important to know your bylaws well. Disputes in meetings can often be avoided or resolved by following them closely. Most committees elect or appoint a Parliamentarian whose job in meetings is to keep an eye on the bylaws and the

Rules of Order, so that if you're challenged on a procedure he or she can provide an independent ruling on the question. It's a good idea to set up a committee every two or three years to review the bylaws and recommend changes to the committee.

Here are some sample county bylaws:

Tioga County:
https://drive.google.com/file/d/1GdTv7ELjvitLb5z8y9ajWJCnkHS2lVZl/view?usp=sharing
Oneida County:
https://drive.google.com/file/d/1P8XuZjjCGc9iijzNkk6zkijJqko9emh8/view?usp=sharing

Meetings

Some counties meet monthly on a regular schedule (for example, the third Thursday at 7pm). Some meet according to a schedule established at the beginning of each year. Some meet less frequently, with 5-day, 10-day or 25-day notice requirements as specified in their bylaws.

You may not hold political meetings in town halls, village halls, or public school buildings. Common venues include private or non-profit town libraries, fire houses, union halls, and private rooms at a restaurant or banquet hall.

Always open a meeting deliberately by calling it to order. Large committees generally begin by asking members to join in the Pledge of Allegiance. A small committee might start by going around the room and having people introduce themselves. These rituals are important: they take people's minds off their previous conversations and settle the room down for business.

The first order of business should be approving the minutes of the last meeting. You need to reach agreement about what happened in that meeting before you can move on to this one. If the minutes have been sent around in advance by email, or if paper copies have been distributed, you can say "I'll entertain a motion to approve the minutes as distributed," or "I'll entertain a motion to waive reading the minutes and approve them." After the motion, ask for a second. Confirm the names aloud to be sure the secretary got them down. Then ask "All in Favor?", then "All Opposed?", then "Any Abstentions?" Then declare the result.

If the vote seems close, ask for a show of hands for each option and count them. If the majority does not approve the minutes, further corrections need to be suggested until enough people agree that the minutes are correct.

Use this routine for any non-weighted vote. Establishing a ritual allows you to focus on the substance of each vote and not have to worry about what step comes next.

The second order of business is usually asking for the Treasurer's report. You want to be transparent with your committee about how money has been spent, and you also want everybody to understand what resources are currently on hand. A standard Treasurer's report includes items paid and monies received since the last report and concludes with a balance. When the Treasurer is done reading the report, ask for a motion to approve the report, following the same procedure outlined above.

After these routine matters, the agenda will vary depending on the business at hand. In some counties the chair prepares the agenda; in some it's the secretary. Some chairs hold an agenda meeting with their officers ahead of a full committee meeting to be sure nothing important gets missed. You might want to print agendas for the meeting or at least circulate them in advance by email.

Once you have an agenda it's important to stick to it. Committee members will often raise completely new issues in the middle of another piece of business. When this happens, ask them to save their concern for the New Business time at the end of the meeting. You want everyone to feel that they can be heard, but you also don't want to waste everybody else's time on points that aren't immediately important.

In small meetings, common sense suggests that you can let people just jump in when they have something to say. In any meeting of over half a dozen people, you should insist on a show of hands from those who want to speak and recognize them in an orderly way. Be sure to let people who don't always speak into the discussion when they ask to be recognized, otherwise one or two strong voices will often dominate.

Where you have very small town committees, encourage them to hold joint regional meetings. It's generally not useful for a committee of two or four to hold meetings by themselves, but if they combine with neighboring towns to create a critical mass

of people, they can often field local activities and events to build a presence for the party in their communities.

A sample meeting agenda is available here: https://drive.google.com/file/d/1k_EUZcxzxDaF_CQc3ZJM2eQ8iQ0zfhzT/view?usp=sharing

Communications

At this point almost all committees use email as their primary means of communication with committee members, candidates, and others. Most have adopted a commercial email package, mainly because mass emails from individual senders usually get bounced or flagged as spam. MailChimp is still available in free and low-cost versions. Constant Contact is relatively inexpensive, and other products are available.

On some committees emails are sent out by the chair, on some by the secretary. Now that many people read emails on their phones, it's important that they be short and to the point. A meeting announcement should tell when, where, and give one or two significant items from the agenda.

You will also need to send out notices about committee and candidate fundraisers, about job opportunities (for campaign staff and party positions), about regional visits by statewide officials, and so on. Many of these will be notices that come to you and need to be forwarded along to the committee or to candidates.

You will probably find that a segmented email list is helpful. Some communications need to go only to your committee members, some only to your Executive Committee if you have one, some only to candidates. Some will go to the entire universe of email addresses you have—for example, an invitation to a county fundraiser.

Most chairs delegate maintaining these lists to the secretary, but you can also designate another member with strong technical skills. Email addresses change all the time. It's helpful to find an email program that propagates an updated email address to all the lists where it occurs, so that you don't have to track them all down every time one changes.

If a committee member unsubscribes from your email list, you, your secretary or another designated member will need to call them and explain gently that they can't do that. You are legally required to send them meeting notices, for example. Maybe unsubscribing was a mistake, but most email programs won't let you resubscribe an individual; they have to request it, typically through a web form that they may need some coaching to use.

You will also want to build and maintain a media list for sending out press releases. Reporters and other media contacts often change jobs frequently, so this list is always a work in progress. If your county makes endorsements ahead of the primary, you will want to announce those in a press release. If you don't endorse, you might still want to send out a press release listing all your candidates after the primary is over, though the media may treat it as old news at that point. If you're holding an event to which the public is invited, you should send out a press release. Fundraisers are not usually announced to the press or the public.

If a member of the media calls you before you feel ready to speak, let the call go to voicemail, then call back as soon as you've determined what your message will be. Reporters work under deadline, so you will earn their respect by responding promptly. But maybe get that second cup of coffee before you call back. It's almost always possible to be honest without saying something that might damage you, the party, or your candidates, as long as your brain is fully engaged.

Almost all county committees now have at least a web site and a Facebook page for digital communications. For web sites the state committee has made the RUN! environment and free server space available to all county committees. Many committees have adopted it, including the DRC. Although individual sites can be extensively customized, the common environment gives Democratic committees around the state a somewhat similar look and feel.

You may be lucky enough to have talented people working for you on emails, social media and press releases. But you, as chair, should either originate or review all communications before they go out.

Candidate Recruiting

As County Chair you're responsible for recruiting candidates for county offices. These might include County Executive, County Clerk, County Comptroller, District

Attorney, County Sheriff, County Court Judge, Family Court Judge, and Surrogate Court Judge. If you have a County Legislature rather than a Board of Supervisors, you will also be seeking County Leg candidates. You should work with chairs in the adjacent counties to recruit candidates for state Assembly, Senate, state Supreme Court, and Congress. Most chairs advertise for candidates between November and January for the upcoming election cycle, as petitions have to be ready to go by late February.

But cultivating prospective candidates is year-round work. If you start recruiting for the next election cycle in mid-November, you're starting too late. It often takes multiple coffee meetings over a period of months to get a strong prospective candidate to say Yes.

Often the best candidates are the ones who come to you rather than the ones you recruit. But most of us, even in deep red counties, feel some responsibility to offer voters a choice rather than an empty Democratic ballot line. We've all fielded candidates who let us persuade them to run and who then didn't do much work in their campaigns. A candidate who emerges on their own will usually be more passionate about running and more willing to put in the effort to win.

Much depends on the party balance in your county or in the particular district. If it's deep red, the standard for a Democratic candidate who comes forward on their own is often "will they embarrass themselves or the party by running?" In a blue district, if you're lucky enough to have one, you may end up with a primary among multiple strong candidates.

It's the purple districts, or those where our disadvantage in party registrations is relatively small, where you should put time and energy into recruiting strong candidates. Many counties assemble a candidate recruitment team to propose names and talk with good prospects. The more people you know in your county, the more people your team can reach out to, the better the odds of coming up with someone who can win.

State Committee and Government

All county chairs are invited to state committee meetings, where you will meet in a joint session with the state Executive Committee. There's generally a reception the night before where you can make valuable connections. Many county chairs also

hold a state committee seat, since as chair you don't have a vote on the state committee itself. You will also be invited to participate in periodic calls with the 61 other county chairs and the State Committee Chair.

The Governor, Attorney General, Comptroller and both US Senators all maintain regional offices and staff (as does your Congressional Rep). You should get to know their representatives in your region, particularly the Governor's rep. When voters come to you or your committee members about issues they've faced in dealing with the state or federal government, these regional offices are there to help them. The staff all take pride in their constituent service work, so you should not hesitate to send people their way.

In turn, they should contact you when their statewide elected official will be visiting your county. Often they do this because they want a crowd for a photo op, but it's still an opportunity for you to connect with statewide officials at least briefly. Your leadership team may welcome the chance to join you at these events. But be forewarned: you almost never get much advance notice.

Statewide officials are also the people you will most want to book as keynote speakers for your county fundraisers. It can be tough to get them to come to small rural counties, but when they do, they are always a good draw. Their regional reps will often be your allies in getting them to come to your county. As of this writing, the state comptroller and the AG have made themselves the most available for these events.

Fundraising

Fundraising professionals talk about three different ways to raise money: events, mailings, and direct cultivation of high-potential donors. A county committee often combines all three approaches in one—a letter tied to an event, with associated calls to potential donors who might purchase sponsorships or program book ads.

If you're able to get a statewide official to headline your event, their schedule will usually dictate when you can hold it. Other possible headliners could be your local member of Congress (if you're lucky enough to have a Democrat), one from a neighboring district, the highest Democratic elected official in your region, a union leader, an academic who studies American politics, a candidate looking to build support for a regional or statewide race.

Some counties hold one big dinner or picnic a year, some a mix of smaller reception; some run events like golf tournaments and field days. Local traditions and the interests of your members may help shape your choices.

Put together a fundraising committee. Do you have committee members who have organized events at work, or through organizations like the PTA, or who are just good party planners? Everybody's busy, so people may be reluctant to volunteer, but people are also pleased if you recognize and ask for their expertise.

You may have the good fortune to inherit a fundraising list from the previous chair. If not, you should start building one as soon as possible. Your list starts with your committee members but should extend far beyond them. Ask elected officials and candidates in your area if they'd be willing to share their lists. Ask committee members who are well connected in the county to suggest names. Democratic attorneys, businesspeople, and academics are generally good prospects.

Today, of course, some of this work has moved to the internet. Emails are less costly than letters, and an Act Blue page makes it easier for donors to contribute. Facebook and other social media can generate donors and event attendees. But some of the older and most prosperous potential donors still respond best to postal mail and personal calls.

You will need to work over your list at least once a year. Remove people who have died (it's particularly insensitive if grieving relatives receive your fundraising request), people who have moved far away, and people who have failed to donate over several fundraising cycles. But be sure to add people as well. Every year in politics you and your committee will meet new people.

A small committee can probably maintain its fundraising list in a spreadsheet, but for larger lists you might find that a database provides more flexibility. Try to identify people on your committee who may have technical skills. People who aren't interested in knocking doors or making calls may be happy to contribute technical expertise if they have it.

At some point in your fundraising cycle, typically after your biggest event of the year, you should send out thank-you notes or cards to all your donors. People who give money should always be thanked. It's not just the right thing to do; it's also likely to help generate repeat donations.

Party Expenditures

Once you've raised the money, what will you spend it on? In most rural counties, the vast majority of the money raised is spent on modest help for our candidates.

Most counties regretfully decide that supporting a physical party office is too big a burden. Rent is high even in small population centers for main street store fronts, and back office spaces don't give you any visibility in the community. If you rent office space, you will also have to staff it. Since we all rely on volunteers (including ourselves) to do everything, that time can probably be better invested in petitioning to get candidates on the ballot in the winter, canvassing to get them elected in the fall, and all the administrative work that running the party entails.

You will also incur administrative costs to pay for printing and envelopes for petitions, printing and postage for fundraising letters and invitations, direct advertising for candidate recruitment and party events, other event expenses, a post office box, and possibly an email platform.

Some committees pay for the chair and state committee members to attend state committee meetings and the Democratic Rural Conference in April. Standard practice ranges from committees who provide no support at all to those who cover lodging, travel, meals and registration fees. A common middle course is to pay lodging only. You should work out a policy on travel costs with your committee and apply it consistently.

You should get a large horizontal party banner, if you don't already have one, to display at party events and carry in parades. Fourth of July and other local parades are low-cost festive occasions where you can establish the Democratic party as a presence in your communities. Encourage your candidates to march, too. Carry flags. It's important to reclaim the symbols of patriotism from the other party and make it clear that Democrats, too, celebrate our country.

Some counties also set up tables at local events such as county fairs and other festivals, or sponsor voter registration tables at a local farmer's market.

State and Other Patronage Jobs

At one time the state sent out state job opportunities in your area to county chairs and invited you to nominate candidates. Under the current administration in Albany, that practice has been largely discontinued. It was a good way to recruit loyal committee members (because you had helped them to a job) and often to strengthen your relationship with unions, by aligning your recommendations with theirs. For many of us, unions remain our strongest financial supporters, but we're able to do less for them in return.

You have more direct party employees at the Board of Elections, or possibly in the role of analyst to your county Democratic legislative caucus. Your legislators and your election commissioner should give serious weight to your recommendations for prospective staff. In turn, you can expect these employees to serve on the committee and help in tasks like staffing the registration table at party events, preparing petitions, and putting mailings together. A rural county cannot generally raise enough money to afford its own paid staff, so we depend on people the party has helped to help the party.

Using VAN (Votebuilder) and MiniVan

The NYS Democratic Party provides each county with access to the Voter Action Network (VAN), a voter database which can be used for petitioning, canvassing and Get Out the Vote (GOTV) work.

MiniVAN Touch, a companion tool, is a free app that can be downloaded to any smartphone. Technical help is available at the state level to set up a county's VAN account and assist the chair in designating differing levels of access for users. Each user of MiniVan has to download the app and set up an account. It is not difficult to download.

VAN is useful in many ways. You can look up information by the voter's name or by address to find the voter's party affiliation, voting record, and other members of the household. Sometimes phone numbers and email addresses are listed, although they are often inaccurate.

Through VAN, you can select voters by party, age, voting record, and other characteristics. Then you can create specific "turfs," or geographical groupings, of

those voters. You can group voters by streets, election districts, towns, and so on. Once you create a MiniVAN number for each turf, you can use it for petitioning, canvassing and/or GOTV work. The MiniVAN number is valid just for one month, but it can easily be refreshed by creating another number for the same turf.

To use MiniVAN, a volunteer or staffer needs a cell phone or MiniPad with a data plan and cell coverage. The whole county does not, however, need cell coverage to make MiniVAN useful. MiniVAN saves paper and ink (which benefits the environment) and leads to more efficiency than paper lists of voters.

When a MiniVAN list number is loaded into the app, the user immediately sees a map showing where the highest concentration of Democrats is and how many Democratic voters are in each household. The icons on the map are color-coded so the user can see whether the household has not been approached, was not home, or has already completed the designated action (signed a petition, responded to a survey, promised to vote). Because the MiniVAN app updates the VAN database continuously, multiple people can work the same turf at the same time, see where others have already been, and find the nearest residence where voters have not yet been reached.

For petitioning, the MiniVAN script can be a bare minimum. But since this is the first time in a particular year that a voter is being approached, questions can be embedded in the script such as “Would you be willing to have yard signs before the next election?” The user can ask (or not ask) the questions depending on the voter’s overall reaction to the petitioning. Answers from some are better than no answers.

For canvassing, the MiniVAN script can include questions about issues that are most important to the voter. A choice of answers can be embedded to be checked depending on what the voter says. Also, it can be recorded that campaign literature was left at the house.

For GOTV the questions would generally revolve around whether the person has a plan to vote and what that plan is.

On the back end, the person overseeing MiniVAN for the county can see what percentage of each turf has been covered, whether it’s for petitioning, canvassing, or GOTV. The party then knows how best to reach out to determine if people need help and where to send volunteers. The party can also pull the data from the survey questions to create lists, for example of people willing to put up yard signs. Post-

petitioning, you can use VAN to evaluate opponents' petitions to see if they should be challenged because of incorrect data (for example, a signer not of the appropriate party, not at the right address, not located in the right town, and so on). This information can be used to challenge petitions.

Committee Treasurer

As County Chair, you need to oversee the work of the treasurer. In New York State, the treasurer of a political party committee (whether at the state, county, city, or town level) holds a legally critical role governed strictly by Article 14 of New York State Election Law, New York State Board of Elections (NYSBOE) regulations, and local party committee bylaws. Without an active treasurer on file, a party committee is legally prohibited from accepting contributions or making expenditures.

Legal Setup & Committee Registration

• Mandatory Designation: Under NYS Election Law § 14-118, every party or constituted committee must appoint a Treasurer and designate an official checking account before conducting financial transactions.

• NYSBOE EFS Registration: The Treasurer registers the committee using the Electronic Filing System (EFS) Web Application to secure a Filer Identification Number (Filer ID) and PIN for electronic report submission.

• Handling Vacancies: If a Treasurer resigns or is replaced, an amended registration statement must be submitted to NYSBOE immediately. Financial operations must pause during a Treasurer vacancy unless an officially designated Assistant Treasurer assumes the role.

Financial Recordkeeping & Documentation

• Detailed Bound Accounts: NYS Election Law requires the Treasurer to maintain detailed, bound (or secure, permanent digital) accounts recording every receipt, contribution, loan, liability, transfer, and expenditure.

• Expenditure Vouchering: Every committee disbursement exceeding $10 must be supported by a receipted bill, invoice, or voucher detailing the specific purpose of

the expenditure.

• Loan and Debt Tracking: Copies of loan documents, notes, or formal debt forgiveness agreements must be maintained and uploaded alongside financial disclosure filings.

• Record Retention: All accounting records, bank statements, contribution records, canceled checks, and campaign literature must be retained for a minimum of three years following the filing date of the applicable disclosure report.

Contribution Rules & Cash Limits

• Cash Restrictions: A party committee or its Treasurer may not accept more than $100 in cash in the aggregate from any single donor. Disbursements over $100 cannot be made in cash.

• Prompt Deposition: All incoming funds (checks, cash, electronics) must be deposited directly into the designated committee depository account.

• Monitoring Limits & Prohibitions: The Treasurer is responsible for screening contributions to ensure compliance with aggregate contribution limits and restrictions (e.g., prohibitions on corporate contributions exceeding annual limits, or foreign national contributions).

• Illegal Contributions: If a contribution's legality cannot be verified, the Treasurer must refund or return the contribution within 30 days of receipt.

Disclosure Filings & NYSBOE Compliance

• Periodic Reports: The Treasurer must file detailed periodic disclosure reports with NYSBOE twice yearly (typically January Periodic and July Periodic) disclosing all financial activity.

• Election-Related Reports: For primary and general elections, the Treasurer must file disclosure reports on the statutory schedule:

o 32-Day Pre-Election Report
o 11-Day Pre-Election Report

o 27-Day Post-Election Report

• 24-Hour Notice Requirements: Any contribution or loan exceeding $1,000 received between the cutoff date of the 11-Day Pre-Election Report and Election Day must be reported electronically within 24 hours of receipt.

• Campaign Materials Upload: Copies of broadcast schedules, print ads, flyers, and digital campaign materials used by the committee may need to be submitted to NYSBOE with the applicable post-election report.

Party Operations & Account Structures

• Housekeeping Accounts (NYS Election Law § 14-124(3)): Some county committees maintain separate "housekeeping" accounts, used strictly to maintain permanent party headquarters, pay staff, and run ordinary day-to-day operations. Funds in a housekeeping account cannot be spent directly to aid or defeat specific candidates in a primary or general election.

• Transfers to Candidates: Treasurers manage party transfers (monetary or in-kind) to endorsed candidates or other constituted committees according to party executive committee authorizations.

Here's the form for appointing a treasurer:
https://drive.google.com/file/d/18-dgb520v4zrACX3fYp2GWtal016klkm/view?usp=sharing

Committee Secretary

As chair, you also need to oversee the work of the committee secretary. The secretary's first responsibility is keeping accurate meeting minutes detailing motions, seconds, and the results of all votes and actions taken. If you as chair create the meeting agenda, it can be helpful to provide the secretary with an advance version to serve as an outline for the minutes. You should also pass along to the secretary any written reports you receive in advance, particularly lists of committee appointees, to ensure names and districts are reported accurately.

Minutes typically include a list of attendees, usually divided into separate lists of committee members and guests. A large committee can append a sign-in sheet to the minutes, or the minutes can indicate that an attendance list is on file.

Minutes may, but need not, include detail of discussions and debates. It's adequate for the secretary to employ phrases like "after considerable discussion" before specifying the resulting motions or consensus agreements that emerged. The treasurer's written report is often included in full in the minutes. Other reports can be summarized to include only the most important points.

Secretaries should produce draft versions of the minutes as soon as possible after a meeting, while memory is still fresh to supplement hand or computer written notes. You should review the draft as soon as possible after you receive it and work with the secretary to ensure that the minutes are accurate. Minutes are typically not actually distributed to the committee until shortly before the next meeting, so that members will have them recently in mind. Copies should be circulated as PDFs, not Word files, so that recipients will all see the same formatting and not be able to make intentional or inadvertent changes. They should never be distributed to anyone beyond the committee until they have been approved.

On most committees the secretary is also responsible for sending out the minutes, sending out meeting notices by the deadline specified in the bylaws, and passing along other communications and notices. Most often it's the secretary who is responsible for keeping the committee email list current with new appointments and resignations.

Advice to Candidates

This section is addressed to candidates, not to chairs. It's included in case you might find it useful.

You will probably need a campaign manager and definitely a treasurer who is not yourself. Ideally, a candidate has only two jobs: raising money and talking to voters. As much as possible, you want to delegate all the other campaign work to volunteers or, if you can afford it, paid staff.

Your Treasurer will need to go to the bank and open a campaign account which is separate from any personal account. Typical names are "Friends of Sarah Smith" or

"Committee to Elect Joe Mills." The account will need an EIN number, which can be obtained for free from the IRS at https://sa.www4.irs.gov/applyein/

The treasurer will then need to register your campaign committee through the NYS Board of Elections. Start with the registration page at https://elections.ny.gov/treasurer-and-candidate-duties. He or she will need to learn how the online finance reporting system works. The state BOE offers periodic training sessions which treasurers can sign up for online.

Candidates typically start fundraising by donating some of their own money to the campaign. If you buy something for your campaign, pay for it from the campaign account. Next,

1) Set up an Act Blue Account so people can donate online.
2) Set up a campaign Facebook page, which is different from your PERSONAL Facebook page.
3) Set up a campaign website.
4) Write a press release announcing your candidacy and send it out to media in the district.

Campaign expenditures typically include:

- Yard Signs [with posts to hold them up]
- Palm (rack) Cards/Door Hangers—so you can leave something at the door or in a voter's hand to remember you by.
- Website/domain name
- Mailings—these are expensive, so depending on how many households are in the district, figure out how you want to target them. You might mail just Democrats, Democrats and Working Families party members, Democrats and voters with no party affiliation, and so on. You also probably want to target new and frequent voters (who voted in, for example, the last three of four elections).
- Absentee ballot chasers—close to the election you can get a list of absentee ballot applications from your BOE. Send at least all the Democrats and Working Families absentee voters a mailing, as they are almost certain to vote.
- Advertising (print) –run, say, a 2x5 ad in the local papers the weekend before the election.

- Advertising (digital) Running a week before the election on any local venues you can reach.

Make a Fundraising Plan

- How much money can you put into your own campaign?
- If you are running for State Assembly or Senate, learn about the matching funds program in NY State.
- Do you know anyone who might help you with a fundraising event? Someone with a nice house, a winery, or a brew pub? A musician who would entertain for free?
- Compile a list of friends and allies that you can ask for donations.

Credits:
Jamal Malik for an initial AI outline
Joan Davis for the VAN and MiniVan section and for extensive proofreading
Maggie Bartley and Harris Seagram for the Treasurer section
Rachel Weil for the Advice to Candidates section