

CSEA's Endorsement Process

**A comprehensive guide to
our member driven process**



Local 1000 AFSCME, AFL - CIO

Message from CSEA President Mary E. Sullivan



CSEA has a member driven endorsement process that interviews and vets candidates running for office. CSEA does not make endorsements based on political parties, but rather on who will best represent the interests of our members and protect the services our members provide.

CSEA gets involved in political elections because the decisions made by elected officials directly impacts the jobs of members. Year after year, CSEA members face such challenges as a county executive failing to negotiate a contract in good faith, or a school district proposing to privatize their bus service, or a state budget seeking to close needed state-run facilities. For these reasons, it is important to elect candidates that will best fight on behalf of CSEA members.

The purpose of this manual is to help you use the CSEA endorsement process as a powerful and effective tool for the benefit of members.

I encourage you to reach out to the Legislative and Political Action Department for questions and to be further trained on CSEA's endorsement process.

In Unity,

A handwritten signature in white ink that reads "Mary". The signature is stylized with a long, sweeping underline that extends to the right.

Mary E. Sullivan
President

About the Legislative and Political Action Department

CSEA's Legislative & Political Action Department primarily operates in two equal and interconnected fields: Department staff analyze proposed legislation for its impact on members, which may include advancing beneficial legislation or stopping harmful legislation at the federal, state, and local government levels; and the department coordinates political action activities with members and activists to support the campaigns of elected officials who share CSEA values.

The department works primarily in the field directly with members to achieve its legislative and/or political goals. The department utilizes educational programs and training to inform members on the latest happenings in government and prepare them to take necessary action, including, most importantly, disseminating information.

The Political Action Fund (PAF) is the financial arm of the Legislative and Political Action Department. It is overseen by a board of trustees made up of the ten Statewide officers, Statewide Political Action Committee Chair, Local Government, Private Sector and State Division Chairs, and four at-large board members elected by the Board of Directors. Annually, the trustees set the budget for the PAF and approve expenditures including campaign contributions.

Political Action Committees (PACs)

The Statewide Legislative and Political Action Committee (PAC) is a standing committee of CSEA. The President of CSEA serves as the Statewide PAC's officer liaison and appoints the chair of the committee along with a number of committee members. Each CSEA Region is represented by three members, including Region PAC chairs who are appointed by Region Presidents and automatically sit on the Statewide PAC. Committee members include a balanced representation of the state division, local government division, and private sector.

Regions, Locals and Units are required by the CSEA constitution to have a standing political action committee. These PACs function at a more localized level with the ability to connect more directly to members within their respective Region, Local or Unit. Similarly, appointments to these PACs are made by the President of the corresponding Region, Local, or Unit.

PACs are active participating in educational programs, membership training, recruitment of activists, implementation of lobbying activities, and making recommendations for endorsements under their jurisdiction.

What is an Endorsement?

Simply put, a CSEA endorsement is a statement of support for a candidate running for elected office.

"A CSEA endorsement is our stamp of approval, indicating the candidate's record, performance in office, or promise of future relations are up to CSEA's high standards, regardless of political party."

Cindy Stiles L674
Chair, Statewide PAC



Why does a candidate want CSEA's endorsement?



Tom DiNapoli
NYS Comptroller

"Every day, I work alongside members of CSEA, and it is an honor to receive their endorsement. I share many of the values for which this organization stands: integrity, hard work and accountability."

As a union of 300,000 active and retired members, CSEA is one of the most respected and influential unions in New York State. Candidates seek out CSEA's endorsement because it shows voters the candidate is pro-union, pro-labor, and pro-middle class working men and women.



A Member Driven Process

CSEA Members make endorsements through PACs as discussed on page 1. CSEA specifies who has jurisdiction for each level of government elections.

Local Government Elections

In local government elections (School District, Village, Town, City or County) the ability to conduct interviews of candidates' rests with the Unit or Local who's working conditions are directly impacted by the political office.

For example, a CSEA County Unit has the jurisdiction to conduct interviews for candidates running for County Executive, as this office directly impacts the members of the County Unit.

Any recommendations of the Unit or Local are submitted to the Region PAC. A formal CSEA endorsement is determined by the Region PAC with strong consideration from the Local/Units' recommendation.

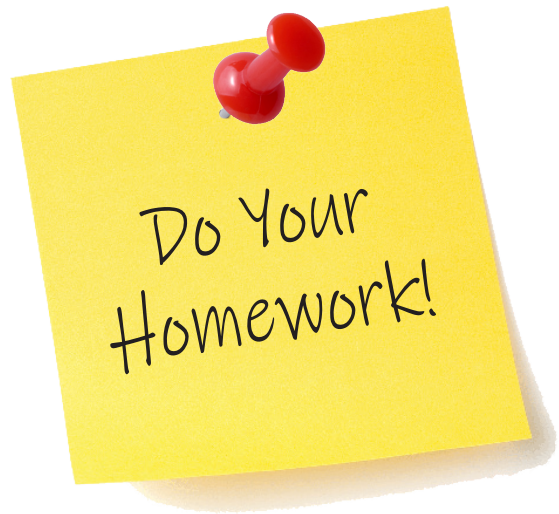
State Legislative Elections

Region PACs have the jurisdiction to conduct interviews for State Senate and Assembly offices and provide a formal recommendation to the Statewide PAC, who in turn have final determination for a formal endorsement.

Federal and Statewide Elections

The CSEA President provides a formal endorsement, with input from members and the Statewide PAC, for federal and statewide offices of U.S. President, U.S. Senate, House of Representatives, Governor, Lieutenant Governor, State Comptroller and State Attorney General.

First, the PAC should determine what races to get involved with by doing some research.



☒ **Impact on Members**

How many members are impacted by this office? How are they impacted?

☒ **Issues**

What CSEA related issues are relevant to this office? Do the candidates have a voting record or public comments on CSEA issues?

☒ **Who's Running**

How many candidates are running? Is there an incumbent? Previous office holder? Previously endorsed?

☒ **Member involvement**

Who do the members of the Local/Unit or Region want to support? Will they put in the work on a campaign?

"This process can be quite the undertaking. PACs are strongly advised to contact their Region Political Action Coordinator for more information, training, and general help through this process." (See page 15)

Mary E. Sullivan
CSEA President



Screening and Vetting Candidates

The PAC is required to solicit all candidates running for the office being considered and to use either a questionnaire or personal interview as screening tools. However, a combination of both provides the best results.



Questionnaire

Contact your Region's Political Action Coordinator to develop a questionnaire that will include key issues specific to your Local, Unit or Region. The questionnaire must be approved by the Region or State PAC. The questionnaire may be distributed by best means possible, email, post-office, or fax. Establish a deadline allowing a few days for responses, along with instructions on how to return completed questionnaires.



Personal Interview

Create a schedule, allowing about 20 minutes per candidate. Prepare a list of questions and who will be asking them. If a candidate has completed a questionnaire, there may be follow up questions to some of their responses, but avoid repeating questions. Allow a candidate to respond, but not take over the interview. Use the interview as an opportunity to educate candidates on issues important to CSEA members.

NOTE: Incumbent office holders may be recommended for endorsement by a PAC without a formal screening process if they have a strong voting record or history of supporting CSEA issues. If an opponent requests an interview, the PAC should allow one, but inform the opponent of CSEA's policy.

Recommendations for Endorsement

As a committee, the interviewing PAC reviews all pertinent information, including initial research, reviewing questionnaire responses and evaluation of the interviews conducted.

After a discussion the PAC should hold a formal vote of each office they wish to recommend a candidate for. A simple majority determines the recommendation of the PAC.

The recommendation is then forwarded to the Region PAC for local government or the Statewide PAC for state races to review and make a final determination.

Additional CSEA Policies To Be Aware Of

PAC Conflicts of Interest

It is incumbent upon each PAC member to maintain an impartial and non-partisan view. If a PAC member has a conflict of interest, whether personal or political, they should disqualify themselves from participating in the endorsement process. If uncertain, the PAC should discuss potential conflicts or seek input from their Political Action Coordinator.

Unofficial Endorsements

No member may endorse or give the appearance of endorsing by publicizing to the membership or media any candidate for political or party office or any proposition until that candidate or proposition has been approved by the applicable Political Action Committee.

No member shall make, or cause to be made, either directly or indirectly, any expenditure, reimbursement or contribution of any kind from union funds or property for political or ideological purposes, nor make any loans or incur any indebtedness for such purposes.

Such actions are in violation of the CSEA Constitution and possibly federal and/or state election laws.



Appeal Process

In the event the Region PAC endorsement is in opposition to the recommendation of the Local or Unit, the Local/Unit President shall have five days to file a written notice of appeal of the Region PAC decision with the Region President.

The appeal shall be heard by the elected Region Officers and Statewide PAC Chair or his/her designee, who shall call a meeting to be held within ten days of receipt of a written appeal. The Region officers and Statewide PAC Chair will hear the positions of the Region PAC and the affected Local/Unit PAC and render a decision as they deem appropriate. The decision of the Region Officers is final and binding and shall be transmitted to the Region PAC Chair and Local/Unit President in writing within three days.

Campaign Contributions

Locals and Units do not have the authority to approve political contributions. In local government elections the Region PAC has sole authority for approving expenditures for local races. In Statewide races, Governor, Lieutenant Governor, Comptroller, Attorney General, State Senate and Assembly races, final authority for approving contributions rests with the Trustees of the Political Action Fund based upon recommendation by the Statewide Legislative and Political Action Committee.

There are a number of legal requirements and internal CSEA controls that need to be followed. Any activity on behalf of a candidate or a campaign that costs money or has a monetary value must be approved by the Region PAC for local races and the Trustees of the Political Action Fund for statewide races. This includes financial contributions, printing, postage, paid phone banks, and the use of the CSEA logo. However, this does not include CSEA's direct member outreach through postcards, phone banks, or door to door activities to CSEA members from their union.

It is important to note that union dues money cannot be used in any federal campaign, including Presidential, U.S. Senate, and Congressional elections. All federal campaigns are funded by voluntary contributions through the AFSCME/CSEA PEOPLE program.

For more information on the PEOPLE program see page 13.

Congratulations, You Made an Official CSEA Endorsement.

OK, Now What?

First, the PAC needs to notify the candidate(s) and members of the endorsement.

Second, Get involved. Do the work.

Third, win the election!

As the endorsement process is member driven, so is the campaign trail. The number one thing campaigns need and CSEA has plenty of...



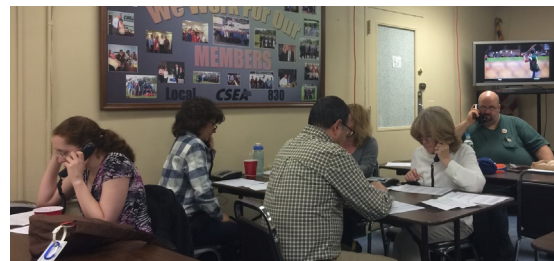
Common Campaign Activities



Postcards



Door-to-Door
and Lit Drops



Phone Banks



Social Media



Press
Events



and more



For updated information on campaigns
Visit: cseany.org/vote

After The Election, The PAC's Work Continues

Having CSEA endorsed candidates win their elections is a huge deal. Yet, win or lose, the responsibilities of members are year round. Members must continue to build and grow relationships with elected leaders and keep them accountable.

This includes promoting CSEA's legislative agenda, staying informed with the latest news, educating fellow members on important issues and lobbying our elected officials.



Bernadette Giambra, Lg12
Chair, Statewide Retiree

"The NYS legislature and local governments of our state are very active. CSEA members need to be just as active and vigilant in order to shape the decisions being made. Make no mistake, these decisions impact current and future members as well as retirees."

CSEA's Legislative Action Center is a opportunity for members to do their part to be heard. Find an issue important to you and take action!

Visit: cseany.org/issues





Year Round Activities for PACs

January/February

- Governor releases his proposed State Budget early January
- Legislative Committee Hearings
- CSEA lobbies State budget

March/April

- Village Elections 3rd Tuesday of March
- Lobbying
- State Budget Deadline April 1st

May

- School Board and Budget Elections 3rd Tuesday
- Lobbying

June

- State and Local Primary Elections 4th Tuesday
- Lobbying

July/August

- Member education programs and trainings
- Voter registration drives

September/October

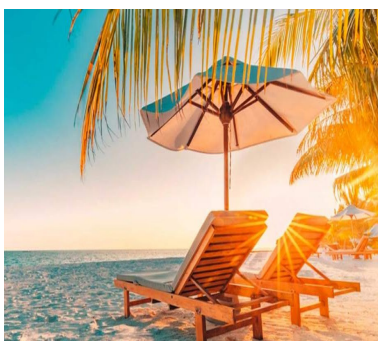
- Campaign for General Election

November

- Election Day is the 2nd Tuesday after the 1st Monday
- Lobby for Local Government Budgets

December

- Local government budgets
- Prepare for new calendar year





PEOPLE is a voluntary CSEA and AFSCME program where participating members contribute funds which are then used in many ways to advance CSEA's agenda at the local, state and federal levels. This includes education programs, lobbying efforts, and supporting candidates running for office.

Only PEOPLE money can be used for any federal office, but PEOPLE money can be used for state and local races.

Visit: cseany.org/people

Email: people@cseainc.org

Public
Employees
Organized to
Promote
Legislative
Equality



Betty Jo Johnson L827
Chair, Statewide PEOPLE

"Whether we are public or private sector workers or retirees, a strong political presence is vital to our existence as a union. For as little as 27 cents a day, you can help to protect and strengthen collective bargaining rights, safety in the workplace, health care, retirement benefits, and much more."

PAC and PEOPLE Committee Chairs

as of 2023.

PAC Chairs

Statewide PAC Chair
Cindy Stiles, L674

Long Island Region 1
John Shepherd L882

Metropolitan Region 2
Vinnie Martusciello, L010

Southern Region 3
Todd Schmitt, L856

Capital Region 4
Tom Edwards, L801
Latasha Gardner, L842

Central Region 5
John Brown, L869

Western Region 6
Tim Finnigan, L608

PEOPLE Chairs

Statewide PEOPLE
Betty Jo Johnson, L827

Long Island Region 1
Barbara Homburger L852

Metropolitan Region 2
Evans Quamina, L443

Southern Region 3
Fred DeStefano, L610

Capital Region 4
Lisa Kelsey, L693

Central Region 5
Karen Bright, L827

Western Region 6
Sandra Suy, L602

Legislative and Political Action Staff

Statewide Staff

Albany, NY 518 436-8622

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Director of Legislative and
Political Action

Bryan Miller
Political Operations Director

Joshua Terry
Legislative Director

Alex George
Legislative Representative

Kim Wallace-Russo
Statewide PEOPLE Coordinator

Davin Carroll
Assistant to the Director

Bob Hawley
Systems Specialists

Libbie Miller
PEOPLE Program Assistant/
Secretary

Deanna Brady
Secretary

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