



**OKDEMS**

**COUNTY LEADERSHIP  
TRANSITION CHECKLIST**

# County Officer Transition Checklist

## Outgoing/Incoming

Being a county officer means organizing your county and educating voters. It involves a consistent commitment in and out of campaign season. The main duties include assisting in registering Democratic voters, serving as the ambassador for county Democratic social functions, canvassing and campaigning in your county on behalf of all Democratic candidates. Assisting in recruiting Democratic candidates, attending and reporting at State Central Committee meetings, engaging and overseeing precinct activities, spearheading Get Out the Vote (GOTV) projects and in turning out the maximum number of Democratic voters.

County officers **are elected in odd-numbered years and serve for two years**. Officers should expect to **average 20-30 hours per month in volunteer time** and maintain active status for their entire two (2) year term. Volunteer time may vary per county depending on the election cycle, and possible special elections in your precinct, county, and district.

Outgoing officers should orient newly elected officers, or newly elected officers should reach out to outgoing officers preferably during a transition meeting, and provide/receive information including the following:

### Documents:

- Constitution & Bylaws and Review of Officer Duties (Included in this manual)
- Financial Records, Account Information and Bank transition of signatures\*
- Records and Email lists
- Forms and Applications
- Copies of Correspondence, Minutes, and Reports
- Office Rental agreements
- Email Resolutions to Congressional District Officers
- Submit Officer and Delegate election results to the State Party Data Director
- Historical files

### Contact Information:

- County Staff and Committees
- Neighboring County Officer Contacts
- District Officer Contacts
- State Party Staff Contacts
- State Party Officer Contacts

### Access to Resources:

- County Website login
- County Social Media Account admin access and logins
- Other online and digital account logins
- Office or storage keys and/or codes

**Other items to share prior or during a transition meeting:**

- Review previous County strategies.
- Pass on equipment and other county materials
- Meeting procedures
- \*Schedule meeting with Bank to sign over account and signatures
- Any outstanding business that still needs to be taken care of
- Events already on the calendar that will need immediate attention
- Things during your term of office that were considered important
- Things you wish you had done during your term in office
- Any advice for the incoming officers.

\*Helpful banking information suggestions. Check with your local bank for policies and rules.

1. Party funds should be held in a bank account under a tax id (EIN). It is not recommended to use a personal social security number to open a party account. If a party account is set up under a personal SSI, you should speak with the bank to make the appropriate changes. You can get an EIN online but be sure to scroll to the portion for political parties. If you have trouble locating the right entry for your EIN, a local accountant should be able to help you out.
2. Have two or three officers as signatories on the account and require two signatures to withdraw funds.

# Article VI: Duties of Officials

## Section 1: General Duties – All officials of the Democratic Party shall:

- A) Support the Democratic Party by attending Party meetings and workshops, Party and candidate fundraising events, and other related events.
- B) Know the Democratic candidates running for elective office in their area and actively campaign for their election.
- C) Encourage unregistered citizens to register Democratic.
- D) Actively encourage Democrats to vote in elections.
- E) Be familiar with the rules, procedures and deadlines governing absentee voting.
- F) Be informed about the positions of the Democratic Party and its candidate on contemporary issues.
- G) Know the dates of upcoming partisan elections.
- H) Support the Party through financial contributions.

## Section 2: Precinct Officers and Officials –

- A) The Precinct Chair shall:
  - 1) Preside over meetings of the Precinct Committee,
  - 2) Represent the Democrats of the Precinct at meetings of the County Convention,
  - 3) Be responsible for seeing that the results of Precinct Committee elections are timely sent to the county secretary,
  - 4) Know current boundaries of the precinct,
  - 5) Know the location of the precinct polling place,
  - 6) Know who the members of the precinct election board are and help the County Central Committee in finding and recruiting replacements,
  - 7) Know of voter registrars in or near the precinct, (Registrars are no longer needed with the Motor-Voter Bill.)
  - 8) Maintain contact with the Democrats of the precinct by holding Precinct Committee meetings and workshops and by canvassing them on local races and issues,
  - 9) Maintain contact with the County Central Committee,
  - 10) Recruit and train precinct workers,
  - 11) Maintain a list of locations in the precinct where Democratic candidates may post campaign signs,
  - 12) Read and become familiar with the Democratic Party handbook,
  - 13) Maintain a current list of registered Democrats in the precinct with telephone numbers.
- B) The Precinct Vice-chair shall:
  - 1) Preside over meetings of the Precinct Committee when the chair is absent or is otherwise unable to preside,
  - 2) Assist the precinct chair in fulfilling the duties of the chair as the precinct chair may direct,
  - 3) Collect contributions to the Democratic Party and be responsible for forwarding them to the county vice-chair.

- C) The Precinct Secretary shall:
- 1) Take minutes at Precinct Committee meetings and forward a copy to the county secretary,
  - 2) Tally votes for Precinct Committee elections and forward the results to the county secretary,
  - 3) Record any resolutions the Precinct Committee may adopt and forward them to the county secretary,
  - 4) Be responsible with the precinct chair for notifying the Democrats in the precinct of Precinct Committee meetings and of other information as the chair may instruct,
  - 5) Perform such other duties as the precinct chair may direct,
  - 6) Record the name, address, and telephone number of all Democrats who attend Precinct Committee meetings and forward a copy to the county secretary.
- D) If precinct committeemen or committeewomen are elected, they shall assist the precinct officers as the precinct chair shall direct.

### Section 3: County Officers and Officials –

- A) The County Chair shall:
- 1) Preside at meetings of the County Convention and County Central Committee or designate a person to preside,
  - 2) Nominate Democrats to the county election board, with the advice and consent of the County Central Committee,
  - 3) Be the sole spokesperson for the county party unless he or she delegates that responsibility in writing to another person,
  - 4) Act as the chief executive and inspirational leader of the county party,
  - 5) Be responsible for interviewing prospective candidates and recruiting candidates to run for offices where there is not a Democratic incumbent,
  - 6) Communicate with the Party and elected officials of the county, the officers of the Democratic clubs in the county and the congressional district officers,
  - 7) Be responsible for training precinct officials,
  - 8) Establish a county office,
  - 9) Be responsible for hiring staff and recruiting volunteers with the advice and consent of the County Central Committee,
  - 10) Be responsible for supplying precinct officials and Democratic workers with materials,
  - 11) Be responsible for raising and disbursing funds and for depositing them in an account in the name of the county party,
  - 12) Countersign with the vice-chair all checks drawn on an account of the county party,
  - 13) Review the qualifications of Republican candidates filed for office in the county to insure that they meet all the statutory qualifications for the respective offices and notify Democratic candidates for the corresponding office in a timely manner if a Republican candidate fails to meet those requirements,
  - 14) Appoint the members of meeting committees with the approval of the County Central Committee.
  - 15) And in addition may appoint a convention secretary, sergeants-at-arms and tally clerks for each convention that is called. The county party secretary may be appointed as the convention secretary.

- B) The County Vice-chair shall:
- 1) Preside at meetings when the chair is absent or is otherwise unable to preside and has failed to designate a person to preside,
  - 2) Act for the chair when the chair is absent,
  - 3) Assist the chair with such tasks as the chair may direct,
  - 4) Collect funds from the Precinct Committee vice-chairs for deposit in the county party's account,
  - 5) Maintain the financial records of the county party, file financial reports required by law and generally act as treasurer of the county party,
  - 6) Assist the chair in raising funds for the county party,
  - 7) Assist the chair in training Party workers and candidates in fundraising and in campaign finance laws,
  - 8) Countersign with the chair all checks drawn on an account in the name of the county party,
  - 9) Submit a financial statement of the county party to the appropriate district vice-chair(s) by January 1 of each year.
- C) The County Secretary shall:
- 1) Take minutes of all County Conventions and County Central Committee meetings and forward a copy to the Congressional District Central Committee(s),
  - 2) Maintain all records deemed necessary by the county chair,
  - 3) Be in charge of the daily operation of the county office and its staff and/or volunteers,
  - 4) Assist the county chair or vice-chair as the county chair may direct,
  - 5) Assist the chair in publicizing the county party and county democratic nominees,
  - 6) Maintain a current list of the registered Democrats of the county with telephone numbers,
  - 7) Forward a list of all precinct and county officials to district and State secretaries,
  - 8) Notify the district secretary of Party activities in the county.
- D) The State delegates shall:
- 1) Attend meetings of the County, Congressional District and State Conventions and represent their constituents,
  - 2) Communicate with their constituents,
  - 3) Assist the county officers with such tasks as the chair may direct.

#### **Section 4: Congressional District Officers –**

- A) The Congressional District Chair shall:
- 1) Preside at the meetings of the Congressional District Convention and the Congressional District Central Committee or designate a person to preside,
  - 2) Be the sole spokesperson for the Democratic Party in the congressional district unless he or she delegates that responsibility in writing to another person,
  - 3) Be the chief executive and inspirational leader of the Democratic Party in the congressional district,
  - 4) Be principally responsible for informing the county officers of upcoming events and policy decisions being made by the Congressional District Central Committee and the State Central Committee,

- 5) Be responsible for county officials and for directing, advising and assisting them in the administration of their duties,
  - 6) Interview prospective candidates and recruit candidates to run for Congress when there is no Democratic incumbent,
  - 7) Coordinate candidate recruitment efforts of the county chairs in multiple county legislative districts,
  - 8) Supply county officials with Democratic Party materials and forms,
  - 9) Be responsible for raising and disbursing funds and for depositing them in an account in the name of the Congressional District Party,
  - 10) Appoint the members of meeting committees with approval of the Congressional District Central Committee.
  - 11) And in addition may appoint a convention secretary, sergeants-at-arms and tally clerks for each convention that is called. The district party secretary may be appointed as the convention secretary.
- B) The Congressional District Vice-chair shall:
- 1) Preside at meetings when the chair is absent, is unable to preside and has failed to designate a person to preside,
  - 2) Act for the chair when the chair is absent,
  - 3) Assist the chair with such tasks as the chair may direct,
  - 4) Maintain financial records of the Congressional District Party, file financial reports required by law and Party rule, and generally act as treasurer of the Congressional District Party,
  - 5) Assist the chair in raising funds,
  - 6) Assist the chair in training, directing, advising and assisting county officials in the administration of their duties,
  - 7) Sign all checks drawn on an account in the name of the Congressional District Party
  - 8) Train, assist and advise the county vice-chairs of the district in filing financial reports required by law or Party rule,
  - 9) Insure that all county vice-chairs file required financial reports in a correct and timely manner,
  - 10) Prepare and submit a financial statement of the district Party which shall include the financial reports of the county parties in the district to the State Treasurer by March 1 of each year.
- C) The Congressional District Secretary shall:
- 1) Take minutes of all Congressional District Convention and Congressional District Central Committee meetings and forward a copy to the State Secretary,
  - 2) Maintain all records deemed necessary by the chair,
  - 3) Assist the chair and vice-chair as the chair may direct,
  - 4) Assist the chair in publicizing the Congressional District Party and the Democratic nominee for congress,
  - 5) Regularly canvass county secretaries about county party activities and report the activities to the State Central Committee.



Banking Information:

EIN: \_\_\_\_\_

Bank Name	Bank Account #	Balance	Note

Monthly Expenses:

Utility	Provider	Account #	Avg. Monthly Fee	Avg. Due Date
Rent/Lease Mortgage*				
Internet				
Electricity				
Water				
Phone				
Insurance				
Refuse				
Water				
Storage				
Security				
Cleaning				
Copier				
Payroll				

Ethics/Compliance:

	Oklahoma Ethics Commission	Federal Ethics Commission
Login		
Compliance Attorney		
Compliance Atty. Contact Number		
Compliance Atty. Contact Email		
Treasurer of Record		





Active Federations:

Federation	Chair/President	Phone	Email
African American			
Disability			
LatinX			
Native American			
Stonewall			
Veteran's			
Women's			

Annual Events:

Event	When Held	Type (Fundraisers, Recruitment, Registration, Holiday)

Frequently Used Vendors: (Printers/Paid Canvassers, etc.)

Vendor	Service	Phone	Email



Primary Media Contacts:

Affiliate	Type (Newspaper/TV/Radio)	Phone	Email

Social Media:

Affiliate	Type (Newspaper/TV/Radio)	Phone
Facebook – Open		
Facebook – Closed Group		
Twitter		
Instagram		
TikTok		
Twitch		

Attached:

- Bank Statements
- Copy of Lease
- Insurance Documents