

EXPENDITURE AND CONTRIBUTION STATEMENTS FOR CANDIDATES TO THE BOARD OF EDUCATION

Article 32 of the New York State Education Law contains rules for expenditure and contribution (“E&C”) statements, which must be filed by candidates for election to a school district board of education. These rules were written into law to permit the electorate to know exactly who or what organization is donating or lending campaign contributions to candidates, and to create transparency for campaign-related expenditures.

As a candidate for school board in the Valley Stream Union Free District 24, you must be aware of your obligation to file E&C statements at various times before and after the upcoming election. You must know when E&C statements must be filed, what type of form to submit at each filing interval, and how to accurately classify your campaign’s reportable contributions and expenditures.

If your campaign receives more than \$500 in total donations, *or* if the total approved expenditures on behalf of your campaign are more than \$500, or if both threshold amounts are exceeded, Article 32 of the Education Law mandates that you file itemized E&C statements at three different intervals during the election process. Even if your campaign has not exceeded either of those threshold amounts, Article 32 still requires you to file affidavits at the same intervals attesting that your expenditures and contributions are both below \$500.

These instructions and template forms will be provided to all candidates. They are prepared solely as a convenience for candidates, and they are not intended to constitute legal advice or serve a substitute for Article 32 of the Education Law. All candidates should review Article 32 in its entirety and will be held solely responsible for ensuring proper compliance with all applicable legal requirements.

Schedule for Filing Expenditure & Contribution Statements

All school board candidates must file E&C statements. The type of form you must file depends on the total running amount of your contributions and expenditures.

All E&C statements should be filed by mail with the District Clerk, Jennie Padilla, at 75 Horton Avenue, Valley Stream, NY 11581 on or before the deadlines below. A statement is considered “filed” when it has been postmarked and deposited at a post office or when it has been emailed or hand-delivered to the District Clerk.

All candidates must file E&C statements at three different points during the campaign:

1. **On or before thirty days prior to the election.** Each candidate must file the first E&C statement at least 30 days before the election. This year, the first statement must be postmarked and deposited at a post office on or before April 22, 2024.

2. **On or before five days prior to the election.** Each candidate must file another E&C statement at least five days before the election. This year, the second statement must be postmarked and deposited at a post office on or before May 16, 2024.
3. **Within twenty days after the election.** Each candidate must file a final expenditure sheet within 20 days after the election. This year, the third statement must be postmarked and deposited at a post office on or before June 10, 2024.

A template form to be used for those three submissions is contained within this packet.

One exception to this schedule is if you receive a campaign contribution or loan worth more than \$1,000 within the five-day period immediately preceding the election. If that occurs, you must file a supplemental E&C statement within 24 hours after receiving the contribution or loan. A template form for this type of submission is also contained within this packet.

What Type of E&C Statement Should You Submit?

The type of E&C statement you must file at each interval listed above **depends on whether your campaign has received more than \$500 worth of contributions, and/or has expended more than \$500 on reportable campaign expenses.** If neither of those thresholds has yet been crossed, you must file the attached form titled *Affidavit of Expenses and Contributions Not Exceeding \$500*. If either or both of those \$500 thresholds has been crossed, you must file the attached form titled *Itemized Affidavit of Expenses and Contributions Exceeding \$500*.

Additionally, there is a supplemental *Affidavit of Late Pre-election Contribution* for any contribution or loan in excess of \$1,000, if received after the close of the period to be covered in the last statement filed before the election but before such election, which must be reported, in the same manner as other contributions, within twenty-four hours after receipt..

Campaign contributions are defined to include any money or other valuable items donated to your campaign by other persons, entities, political committees, or by you personally. Campaign expenditures are defined to include any money or valuable items that were paid out, given away, or promised, by you or by someone on your behalf with your approval, in connection with your nomination or election or to aid or influence the defeat of any other candidate.

- A. “Personal expenses” under Education Law § 1528(c)(2), which are expenses directly and personally incurred and paid by the candidate, including,
 - traveling expenses and expenses incidental thereto;
 - costs of writing, printing and preparing for transmission any letter, circular, or other publication not issued at regular intervals, containing a statement of the position or views of the candidate or person upon public or other questions;
 - stationery and postage costs; and
 - telephone and other public messenger services.

- B. Expenditures made by other persons on behalf of your campaign without your approval, provided the amount of the expenditure is limited to \$25 and the third party making the expenditure files a sworn statement with the District Clerk affirming that you did not approve the expenditure.

Any expenditures within exception B above are non-reportable, meaning they do not count toward the monetary threshold, and they do not need to be included on any E&C statements you file.

If you are required to fill out an *Itemized Affidavit of Expenses and Contributions More than \$500*, you must list the following information on the form for each reportable campaign expenditure and contribution to your campaign:

1. Dollar amount of any receipt, contribution or transfer;
2. Fair market value of any receipt, contribution or transfer, which is other than of money;
3. Name and address of the transferor, contributor or person from whom received (including the candidate).
4. If any contributions were received from, or expenditures paid to, a political committee as defined in New York State Election Law § 14-100, you must provide:
 - the name of the political committee;
 - the political unit represented by the committee;
 - the date of receipt of any contribution from the political committee;
 - the dollar amount of every expenditure; and
 - the name and address of the person to whom it was made or the name of and the political unit represented by the committee to which it was made and the date thereof.

If you submit a second or third *Itemized Affidavit of Expenses and Contributions More than \$500* at any point during your campaign, the second or third submission does not need to restate all the individual contributions that were originally listed on prior submissions. However, the second or third submission must contain a summary of the contribution and expenditure amounts listed on any prior submission.

For example, if a candidate submits an E&C statement 30 days before the election, and that form itemizes 10 separate sources of contributions and five specific expenditures, that same information would not need to be duplicated on the candidate's second E&C statement, filed five days before the election. Rather, the candidate's second E&C statement would list only *new* contributions or expenditures since the prior submission. The second form would also be required to contain a general statement that those 10 contributions and five expenditures were previously reported, along with the total amounts (total sum) of the prior contributions and expenditures.

Once the District receives an E&C statement from a candidate, the form must be kept by the school district for a period of *three* years from the date of filing. Because E&C statements constitute a part of the public records of the school district, they are available for public inspection through the New York State Freedom of Information Law.

Fill out and submit this affidavit if your campaign receives a contribution or loan in excess of a monetary amount or fair value of \$1,000 within the five days immediately prior to the election.

VALLEY STREAM UNION FREE SCHOOL DISTRICT 24
TOWN OF VALLEY STREAM

In the Matter of Expenditures and Contributions of

**AFFIDAVIT OF
LATE PRE-
ELECTION
CONTRIBUTION**

(Candidate's Name)

a candidate for the Board of Education of the
VALLEY STREAM UNION FREE SCHOOL DISTRICT 24.

STATE OF NEW YORK)
) ss.:
COUNTY OF NASSAU)

- _____, being duly sworn, deposes and says:
(Candidate's Name)

1. This affidavit is submitted pursuant to the provisions of Education Law §§ 1528 and 1529.
2. I am a candidate for election to a seat on the Board of Education of the Valley Stream Union Free School District 24 in the election to be held on Tuesday, May 21, 2024.
3. The following is an itemized list of reportable contributions of moneys, loans, or other valuable things that I have received in furtherance of my campaign from any other persons, firms, associations, or corporations with a monetary amount exceeding \$1,000 after the close of the period to be covered in the last statement filed before the election but before such election:

	Contributor Name	Contributor Address	Monetary Amount or Fair Market Value	Political Committee (y/n)
1.				
2.				
3.				
4.				

If any contributions were from a political committee, provide: (1) the name of the political committee; (2) the political unit represented by the committee; (3) date the contribution was received; and (4) the name and address of the person to whom it was made or the name of the political unit represented by the committee to which it was made and the date thereof.

4. I affirm that this affidavit is being submitted to the District Clerk of the Valley Stream Union Free School District 24 within 24 hours or less of the receipt of each contribution listed above.
5. This affidavit is made under penalty of perjury.

Candidate's Signature

Sworn to and subscribed before me this
_____th day of _____, 202_

Notary Public

Fill out and submit this affidavit ONLY if:

(1) the total value of all the contributions to your campaign from other persons or entities does not exceed \$500 since the beginning of your campaign,

AND

(2) the total amount of expenditures made on behalf of your campaign (either made by you or by other persons or entities, with your approval) is below \$500 since the beginning of your campaign.

VALLEY STREAM UNION FREE SCHOOL DISTRICT 24
TOWN OF VALLEY STREAM

In the Matter of Expenditures and Contributions of

_____,
(Candidate's Name)

**AFFIDAVIT OF
EXPENSES AND
CONTRIBUTIONS
NOT EXCEEDING
\$500**

a candidate for the Board of Education of the
VALLEY STREAM UNION FREE SCHOOL DISTRICT 24.

STATE OF NEW YORK)
) ss.:
COUNTY OF NASSAU)

- , being duly sworn, deposes and says:
(Candidate's Name)

1. This affidavit is submitted pursuant to the provisions of Education Law §§ 1528 and 1529.
2. I am a candidate for election to a seat on the Board of Education of the Valley Stream Union Free School District 24 in the election to be held on Tuesday, May 21, 2024.
3. This affidavit is submitted to meet the following campaign expenditure & contribution reporting deadline (check one):
 - 1. First Statement: On or before thirty days prior to the election (April 22, 2024)
 - 2. Second Statement: On or before five days prior to the election (May 16, 2024)
 - 3. Third Statement: Within twenty days after the election (June 10, 2024)
4. **Contributions:** I affirm that the total aggregate amount of contributions of moneys or other valuable things that I have received in furtherance of my campaign from any other persons, firms, associations, or corporations, since the beginning of my campaign for Board of Education of the Valley Stream Union Free School District 24, has not yet exceeded \$500.

5. **Expenditures:** I affirm that any expenditures for personal expenses, which when taken together with the total expenditures incurred by others on my behalf and with my approval, do not exceed \$500.

6. This affidavit is made under penalty of perjury.

Candidate's Signature

Sworn to and subscribed before me this
_____th day of _____, 202_

Notary Public

Fill out and submit this affidavit if:

(1) the total aggregate value of all the contributions to your campaign from other persons or entities has exceeded \$500 since the beginning of your campaign,

AND/OR

(2) the total aggregate amount of expenditures made on behalf of your campaign (either made by you or by other persons or entities, with your approval) has exceeded \$500 since the beginning of your campaign.

VALLEY STREAM UNION FREE SCHOOL DISTRICT 24
TOWN OF VALLEY STREAM

In the Matter of Expenditures and Contributions of

**ITEMIZED
AFFIDAVIT OF
EXPENSES AND
CONTRIBUTIONS
EXCEEDING \$500**

(Candidate’s Name)

a candidate for the Board of Education of the
VALLEY STREAM UNION FREE SCHOOL DISTRICT 24.

STATE OF NEW YORK)

) ss.:

COUNTY OF NASSAU)

- _____, being duly sworn, deposes and says:
(Candidate’s Name)

1. This affidavit is submitted pursuant to the provisions of Education Law §§ 1528 and 1529.
2. I am a candidate for election to a seat on the Board of Education of the Valley Stream Union Free School District 24 in the election to be held on Tuesday, May 21, 2024.
3. This affidavit is submitted to meet the following campaign expenditure & contribution reporting deadline (check one):
 - 1. First Statement: On or before thirty days prior to the election (April 22, 2024)
 - 2. Second Statement: On or before five days prior to the election (May 16, 2024)
 - 3. Third Statement: Within twenty days after the election (June 10, 2024)
4. I affirm that:
 - a. **Contributions:** The total aggregate amount of contributions of moneys or other valuable things that I have received in furtherance of my campaign from any other persons, firms, associations, or corporations, since the beginning of my campaign for Board of Education of the Valley Stream Union Free School District 24, has exceeded \$500;

and/or

- b. **Expenditures:** I affirm that any expenditures, which when taken together with the total expenditures incurred by others on my behalf and with my approval, exceed \$500.

- 5. The following is an itemized list of reportable contributions, as defined above in paragraph 4(a), received by my campaign during the reporting period designated above in paragraph 3 (continue on additional sheets if necessary):

	Contributor Name	Contributor Address	Monetary Amount or Fair Market Value	Political Committee (y/n)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				

If any contributions were from a political committee, provide: (1) the name of the political committee; (2) the political unit represented by the committee; (3) date the contribution was received; and (4) the name and address of the person to whom it was made or the name of the political unit represented by the committee to which it was made and the date thereof.

- 6. In prior expenditure & contributions statements for my campaign, I have reported the following contribution amounts for each prior reporting period:

7. The following is an itemized list of reportable expenditures, as defined above in paragraph 4(b), expended by my campaign during the reporting period designated above in paragraph 3 (continue on additional sheets if necessary):

	Expenditure Recipient	Address of Recipient	Monetary Amount or Fair Market Value	Political Committee (y/n)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				

If any expenditures were to a political committee, provide: (1) the name of the political committee; (2) the political unit represented by the committee; (3) date the expenditure was transferred to the political committee; and (4) the name and address of the person to whom it was made or the name of the political unit represented by the committee to which it was made and the date thereof.

8. In prior expenditure & contributions statements for my campaign, I have reported the following expenditure amounts for each prior reporting period:

9. This affidavit is made under penalty of perjury.

Candidate's Signature

Sworn to and subscribed before me this
____th day of _____, 202_

Notary Public