

## Hansen, Patty

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**From:** Sophie Lehman <sophie@techandciviclife.org>  
**Sent:** Thursday, September 14, 2023 3:39 PM  
**To:** Sophie Lehman  
**Subject:** September Alliance Call on 9/27

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Hello!

[Register now](#) for the Alliance monthly call on Wednesday, September 27 from 12:00pm - 1:30pm Pacific / 3:00pm - 4:30pm Eastern. This monthly Zoom call will bring together Alliance partners and Centers to provide updates and create space for small group discussions. This month we'll be celebrating and reflecting on the development of poll worker standards and resources before we transition to a new topic – communications.

All staff are welcome to join and [registration is required](#).

Hope to see you then!  
Sophie

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Sophie Lehman (she/her)  
Associate Director  
Center for Tech and Civic Life  
[www.techandciviclife.org](http://www.techandciviclife.org)



## Hansen, Patty

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**From:** Sophie Lehman <sophie@techandcivicliflife.org>  
**Sent:** Thursday, October 5, 2023 11:09 AM  
**To:** Hansen, Patty  
**Subject:** Alliance Convening RSVP and Details

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Hi Patty,

I'm excited to share details for our November 29 - December 1 convening in Chicago! The convening will begin Wednesday morning, so plan to travel on Tuesday, November 28. We will conclude on Friday, December 1 at 2pm. Virtual attendance options are available. [Learn more about cost, travel, and event logistics.](#)

At the convening, we'll be wrapping up communications and moving into audits, ballot accounting, and chain of custody. I'll share a more detailed agenda in the coming weeks.

Please [complete this RSVP form](#) by October 26.

We can't wait to see you in Chicago!

Best,  
Sophie



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Associate Director  
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## Hansen, Patty

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**From:** Sophie Lehman <sophie@techandcivicliflife.org>  
**Sent:** Tuesday, October 10, 2023 8:52 AM  
**To:** Sophie Lehman  
**Cc:** Whitney May  
**Subject:** October Alliance Call on 10/25

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

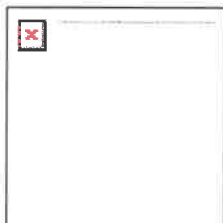
Hello!

[Register now](#) for the October Alliance call on Wednesday, October 25 from 12:00pm - 1:30pm Pacific / 3:00pm - 4:30pm Eastern. This monthly Zoom call brings Alliance partners and Centers together to provide updates and connect with each other. This month we'll be cheering on Centers with November elections, learning more about communications standards and resources, and practicing standards codevelopment in small groups.

All staff are welcome to join and [registration is required](#).

Hope to see you then!  
Sophie

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## Hansen, Patty

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**From:** Sophie Lehman <[sophie@techandcivicliflife.org](mailto:sophie@techandcivicliflife.org)>  
**Sent:** Monday, October 30, 2023 11:50 AM  
**To:** Hansen, Patty  
**Subject:** Re: Alliance Convening RSVP and Details

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Hi Patty,

I hope you're doing well! I'm checking in to see if you know your plans yet for the Chicago convening next month as we work on finalizing food, etc. Can you [complete this RSVP form](#)?

I also wanted to flag that tomorrow is the last day to [book a hotel room using the event rate](#).

Let me know if you have questions!

Thanks!  
Sophie

On Thu, Oct 5, 2023 at 11:09 AM Sophie Lehman <[sophie@techandcivicliflife.org](mailto:sophie@techandcivicliflife.org)> wrote:  
Hi Patty,

I'm excited to share details for our November 29 - December 1 convening in Chicago! The convening will begin Wednesday morning, so plan to travel on Tuesday, November 28. We will conclude on Friday, December 1 at 2pm. Virtual attendance options are available. [Learn more about cost, travel, and event logistics](#).

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## Hansen, Patty

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**From:** Sophie Lehman <sophie@techandcivicle.org>  
**Sent:** Monday, November 20, 2023 1:16 PM  
**To:** Hansen, Patty  
**Subject:** Final Alliance Convening Details

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Hi Patty!

We're excited to see you in Chicago soon!

Before you depart, I wanted to highlight a few things. Additional details can be found in the [event document](#).

1. To help make the most of our time together, we've compiled a couple requests for you to complete prior to the start of the convening. [Details are in the document](#) and should take less than 20 minutes to complete.
2. The [agenda](#) has been added to the document. If you'd like any staff to join a session remotely, please let me know.
3. If your travel plans allow, join us on Tuesday evening at Amuse (downstairs in Swissotel) from 6-8pm for an informal hello.

Please let me know what questions I can answer.

Safe travels and see you soon!

Sophie

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[www.techandcivicle.org](http://www.techandcivicle.org)



## Hansen, Patty

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**From:** Sophie Lehman <[sophie@techandcivicliflife.org](mailto:sophie@techandcivicliflife.org)>  
**Sent:** Monday, November 27, 2023 9:45 AM  
**To:** Hansen, Patty  
**Subject:** Re: Final Alliance Convening Details

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Wonderful, can't wait!

On Wed, Nov 22, 2023 at 3:43 PM Hansen, Patty <[phansen@coconino.az.gov](mailto:phansen@coconino.az.gov)> wrote:

Sophie,

I've completed the forms and am bringing some of our past voter guides to hand out. I'm very excited to attend the meeting.

Take care and have a very Happy Thanksgiving holiday weekend.

Patty

**From:** Sophie Lehman <[sophie@techandcivicliflife.org](mailto:sophie@techandcivicliflife.org)>  
**Sent:** Monday, November 20, 2023 1:16 PM  
**To:** Hansen, Patty <[phansen@coconino.az.gov](mailto:phansen@coconino.az.gov)>  
**Subject:** Final Alliance Convening Details

**[EXTERNAL EMAIL]**

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Hi Patty!



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## Hansen, Patty

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**From:** Sophie Lehman <sophie@techandcivicliflife.org>  
**Sent:** Monday, December 4, 2023 9:28 AM  
**To:** Hansen, Patty  
**Subject:** 2024 Membership Agreement  
**Attachments:** 2024AllianceMembershipAgreementCoconino.pdf

**[EXTERNAL EMAIL]**

Use caution before clicking on links, opening attachments, or responding. DO NOT CLICK unless you recognize the sender and know the content is safe.

Hi Patty!

It was so great to see you last week! I hope you had an easy trip home and a restful weekend. We will send you an invoice for the convening later this week.

In the meantime, here is the 2024 Alliance membership agreement for your review. Please let me know if you have questions.

Thanks!  
Sophie

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Associate Director  
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# U.S. Alliance for Election Excellence

## U.S. Alliance for Election Excellence

### Membership Agreement

We're thrilled you're here. This document lays out the rules and guidelines for participation in the U.S. Alliance for Election Excellence (the "Alliance"). The Alliance is a project of the Center for Technology and Civic Life, an Illinois not-for-profit corporation. This is a legal document. Please read it carefully, and please ask any questions you may have. You must consult your legal counsel to ensure that your participation complies with all applicable laws in your jurisdiction. If you have any questions for us, please feel free to reach out to our team to discuss in more detail.

#### **Alliance Goals and Purpose:**

The Alliance is here to learn from election officials, inspire them to excellence, and celebrate their success. To accomplish these goals, the Alliance will develop and establish a nonpartisan, nationwide certification program so that jurisdictions meeting certain performance standards may hold themselves out as Centers for Excellence.

#### **Commitment to Nonpartisanship:**

We are dedicated to supporting election officials and local governments of all size, partisanship, and geography by providing tools and resources that allow officials to conduct safe, secure, trustworthy, and inclusive elections. Our commitment to nonpartisanship is total. We will never attempt to influence the outcome of any election. Period.

#### **In addition, Alliance partners will never:**

- Touch live ballots or ballot tabulating equipment
- Give legal advice
- Require you to implement specific advice or recommendations

### **Benefits of Membership:**

At this point in time, centers can choose to join the Alliance at the basic membership level or premium membership level. Both tiers reflect a paid membership model.

#### **Basic Membership:**

- Curated access to a selection of off-the-shelf, publicly-accessible election administration resources, document templates, and training materials
- Center-specific consulting from select Alliance partners, in the form of a \$800 credit towards the fair market value of Alliance partners' hourly consulting services
- Access to numerous multi-center group coaching sessions hosted by select Alliance partners on an hourly basis
- Invitations to numerous live and recorded trainings and demos hosted by select Alliance partners, as well as facilitated discussions among centers concerning topics related to best practices in election administration

**Premium Membership:** Includes all of the coaching, training, and facilitated discussion among centers included in Basic Membership, plus:

- Center-specific consulting from select Alliance partners, in the form of a \$4,000 credit towards the fair market value of Alliance partners' consulting services on an hourly basis

### **Obligations of Membership:**

Centers agree to pay annual membership dues to the Alliance and to make non-monetary (but highly significant) contributions to the broader activities of the Alliance. These non-monetary contributions are key components of Alliance membership, and—in addition to membership dues—are offered as *bona fide* consideration in exchange for the fair market value of Alliance partners' services.

#### **Non-Monetary Contributions**

A core purpose of the Alliance is to promote the exchange of information about best practices in all directions: from the Alliance partners to centers, between centers, and from centers to the Alliance. One outcome of this exchange of information will be the creation of Values and Standards for Election Excellence (“the Standards”), which reflect nonpartisan excellence in election administration for local election departments across the county. Centers agree to contribute to the creation of the Standards by:

- Attending and participating in events hosted by the Alliance for the purpose of defining and developing the Standards;
- Attending and participating in events hosted by the Alliance for the purpose of developing measurements, tools, trainings, and materials to help election jurisdictions achieve the Standards;
- Providing written and verbal feedback on documents, forms, templates, and trainings generated by the Alliance that are related to the Standards;
- Sharing local best practices and, where permissible, non-confidential forms, templates, and documents with the Alliance to be used as models for other election jurisdictions seeking to achieve the Standards;
- Offering advice and support to Alliance partners and other centers;
- Sharing non-sensitive, non-confidential technical data and usage statistics and providing feedback about any Standards-related digital tools offered by Alliance partners and implemented by the center; and

### **Membership Dues**

In addition to the participation requirements detailed above, centers agree to pay yearly dues to the Alliance in the following amounts:

- Basic Membership: \$1,600/year
- Premium Membership: \$4,800/year

Membership is valid for one calendar year and is renewable on an annual basis. If desired, you may pre-pay for more than one year of membership; simply contact us for arrangements.

In some jurisdictions, state or local law may prohibit the use of private funds to pay for Alliance membership dues. By signing below, you agree not to use private funds to pay your membership dues unless doing so is permitted in your jurisdiction, and you certify your compliance with applicable legal requirements (you should consult your legal counsel).

### **Termination:**

Participation can be terminated by any party for any reason. Refunds of Alliance member dues will be offered on a pro-rated basis based upon the Alliance partner services utilized as of the termination date.

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If you agree to the above terms of membership, please sign and date below.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Signed on behalf of: \_\_\_\_\_

Legal counsel to signatory:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Signed on behalf of: \_\_\_\_\_