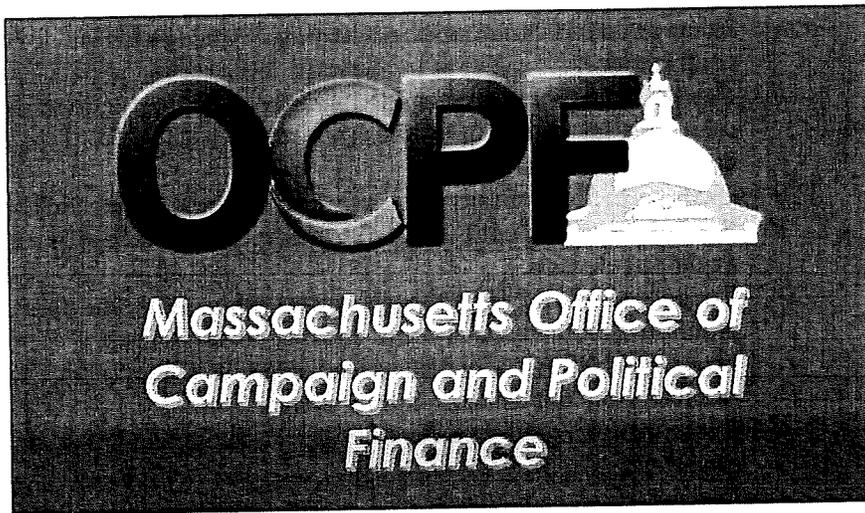


# **CAMPAIGN FINANCE GUIDE FOR MUNICIPAL CANDIDATES WHO FILE LOCALLY**



All municipal candidates file locally, except: 1. Mayoral candidates. 2. City council candidates in cities with populations of more than 65,000.

[WWW.OCPF.US](http://WWW.OCPF.US)  
617-979-8300  
[OCPF@MASS.GOV](mailto:OCPF@MASS.GOV)

One Ashburton Place, Room 411  
Boston, MA 02108

## Basic Campaign Finance Rules

- ✓ **\$1,000 annual limit** from an individual to a candidate or candidate's committee.
- ✓ **Receipts or Expenditures** of more than \$50 must be *itemized on campaign finance reports (the M102 form)*.
- ✓ **Contributions of \$200** or more require occupation and employer information
- ✓ **When making a reimbursement**; no person may sign a check to himself or herself.
- ✓ **Raffles** are prohibited.
- ✓ **No anonymous** contributions, including "Passing the Hat" for cash contributions.
- ✓ **Cash** contributions are permitted, limited to \$50 per individual per calendar year (name and address are required). The \$50 limit also applies to the candidate.
- ✓ **Cash App**: \$50 limit per year (name and address are required).
- ✓ **Records** must be kept by committees for six years after the date of a relevant election.
- ✓ **Corporate, LLC, LLP and partnership contributions** are prohibited, both monetary and in-kind, to candidates, PACs and party committees. A candidates must pay for goods or services received from the business entities above.
- ✓ **Expenditures** can be made to enhance the political future of a candidate.
- ✓ **Expenditures** cannot primarily be for anyone person's personal use.
- ✓ **Provide a detailed purpose** for each expenditure on campaign finance reports. Such as: "Food and drink for volunteers holding signs."

## Out-of-Pocket Expenditures

Many local candidates spend their personal funds when running for municipal office. If a candidate uses his or her personal funds to pay a vendor directly, follow these reporting steps:

1. Report the expenditure on Schedule E of the M102 campaign finance report.
2. If a loan, report the amount spent on Schedule D (a debt owed from the campaign to the candidate).

## SUMMARY OF THE STEPS

1. All new candidates must submit a CPF M101 organizational form.
2. Open a bank account. Most banks require an IRS EIN.
3. Recordkeeping: Names and addresses for all donors, and keep all paper records, including invoices.
4. File campaign finance reports on time using M102 forms or Reporter 7 software. To register for Reporter 7 software, e-mail OCPF. Submit reports to the municipal election official.
5. All incumbents file year-end reports each January, as well as non-incumbents with balances or activity.
6. Communicate with your local election official (clerk) for reporting requirements.

## GROUND RULES

### Public Employees\*

**May not** solicit (verbal or written), collect money or sell tickets to a fundraiser

**May not** host a fundraiser

**May not** help identify people to be targeted for fundraising

**May not** serve as treasurers of any political committee

**May** work for a campaign in a non-fundraising capacity (holding signs, stuffing envelopes, serving food at a fundraiser)

**May** make contributions to candidates and political committees

*\*Anyone employed for compensation by the state, a county or a municipality, full or part time. Elected officials are exempt.*

### Government Buildings

#### NOT PERMITTED

**Solicit or receive** contributions in a public building

**Send invitations** to a fundraiser to a government building address

**Display** posters or fliers advertising a fundraiser

**Solicitations** to public e-mail addresses

## **Filing Requirements**

### **Pre-Preliminary Reports**

Due eight days prior to an election. Pre-preliminary reports are filed by candidates if their names appear on the preliminary ballot.

### **Pre-Election Reports**

Due eight days prior to an election.

### **Post-Election Reports**

Due 30 days after an election (for town elections that are not in November).

### **Year-end Reports**

Due every Jan. 20. All incumbents file a year-end report, as well as non-incumbents with activity during the reporting period, a balance or liabilities.

## **Campaign Finance Forms**

All forms are available at the OCPF website typing the form name into the search bar.

**M102:** Campaign finance report. This is the standard form used by all candidates.

**M101:** Organizational form. A candidate cannot be his or her own treasurer, but can be chair. Every candidate completes the M101.

**M102-0:** This campaign finance form can be signed by a candidate who has no activity, no balances and not committee.

**M109:** This form allows a candidate to declare, for a calendar year, that no money will be raised or spent, and the candidate has no balances.

**CPF 102A:** Amendment form. This form is used to clarify or correct previously filed campaign finance reports.

**CPF R-1:** Reimbursement form to itemize reimbursements.