

CHECKING IN

OCPF's monthly newsletter for local election officials

MARCH 2022

OCPF

617-979-8300

www.ocpf.us

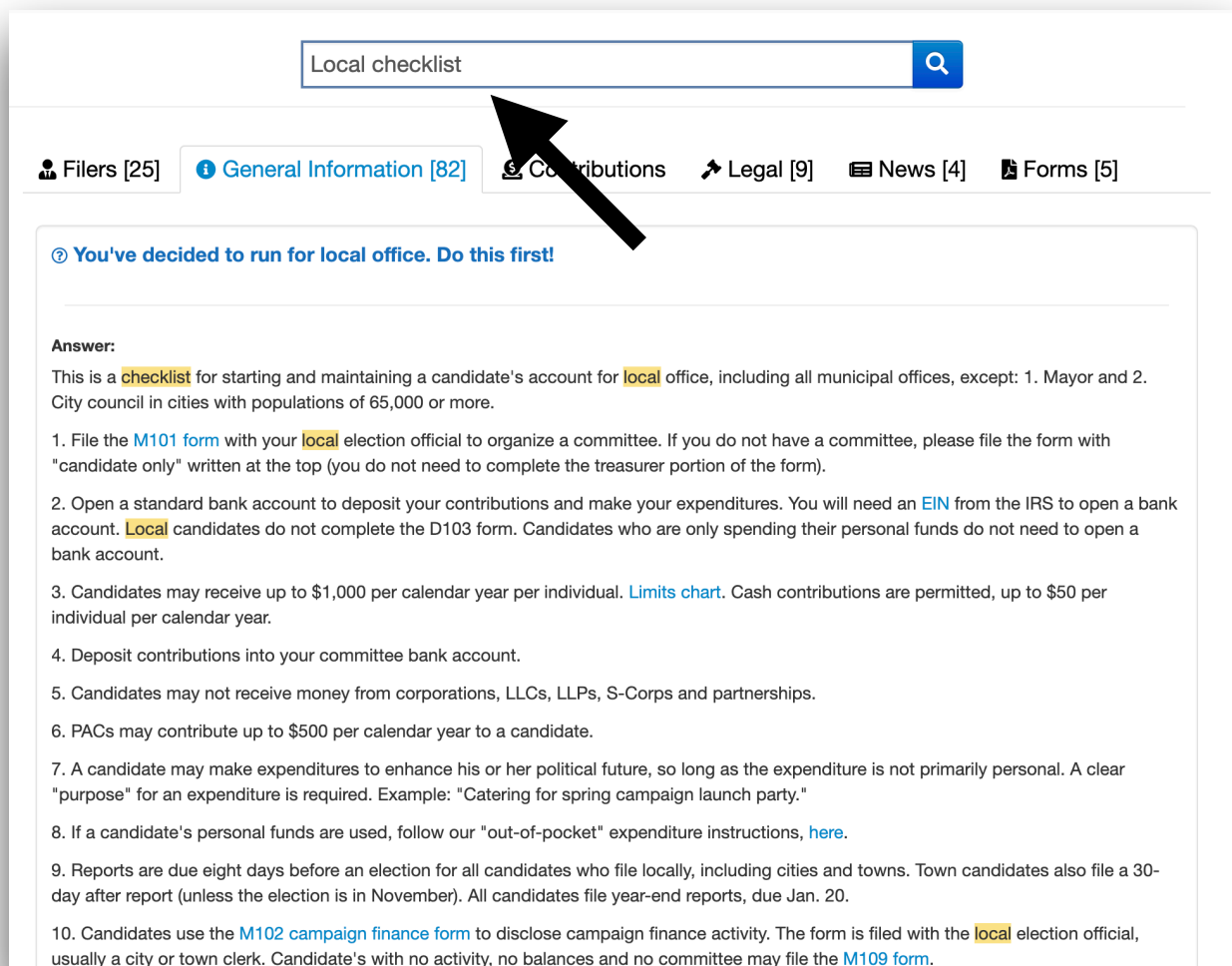
[Clerk Support](#)

What's the fastest way to direct local candidates to forms and guides?

Ask them to type "Local Checklist" into OCPF's search engine at www.ocpf.us

The checklist provides candidates with information on how to operate and maintain a campaign account, with links to the guides and forms they need. It's a one-stop-shop for municipal candidates.

The checklist is for candidates who file with local election officials, such as school committee and select board. It does not apply to mayoral candidates, or city council candidates in cities with populations of more than 65,000, who file with OCPF.



The screenshot shows the OCPF website's search results for the query "Local checklist". A black arrow points to the search bar. The results page features a navigation bar with links to Filers [25], General Information [82], Contributions, Legal [9], News [4], and Forms [5]. The main content area displays a heading "You've decided to run for local office. Do this first!" followed by an "Answer:" section. The answer provides a checklist of steps for candidates, including filing forms, opening bank accounts, and adhering to contribution limits.

Local checklist

Filers [25] General Information [82] Contributions Legal [9] News [4] Forms [5]

You've decided to run for local office. Do this first!

Answer:

This is a **checklist** for starting and maintaining a candidate's account for **local** office, including all municipal offices, except: 1. Mayor and 2. City council in cities with populations of 65,000 or more.

1. File the **M101 form** with your **local** election official to organize a committee. If you do not have a committee, please file the form with "candidate only" written at the top (you do not need to complete the treasurer portion of the form).
2. Open a standard bank account to deposit your contributions and make your expenditures. You will need an **EIN** from the IRS to open a bank account. **Local** candidates do not complete the D103 form. Candidates who are only spending their personal funds do not need to open a bank account.
3. Candidates may receive up to \$1,000 per calendar year per individual. **Limits chart**. Cash contributions are permitted, up to \$50 per individual per calendar year.
4. Deposit contributions into your committee bank account.
5. Candidates may not receive money from corporations, LLCs, LLPs, S-Corps and partnerships.
6. PACs may contribute up to \$500 per calendar year to a candidate.
7. A candidate may make expenditures to enhance his or her political future, so long as the expenditure is not primarily personal. A clear "purpose" for an expenditure is required. Example: "Catering for spring campaign launch party."
8. If a candidate's personal funds are used, follow our "out-of-pocket" expenditure instructions, [here](#).
9. Reports are due eight days before an election for all candidates who file locally, including cities and towns. Town candidates also file a 30-day after report (unless the election is in November). All candidates file year-end reports, due Jan. 20.
10. Candidates use the **M102 campaign finance form** to disclose campaign finance activity. The form is filed with the **local** election official, usually a city or town clerk. Candidate's with no activity, no balances and no committee may file the **M109 form**.



RECENT QUESTIONS ASKED BY CITY AND TOWN CLERKS

Q: Can candidates e-mail their completed campaign finance forms to my office?

A: Yes. Campaign finance forms can be signed, scanned and e-mailed to your office.

Q: What are the campaign finance reporting dates for our spring elections?

A: Please use OCPF's [calculator](#) to determine reporting periods and due dates.

Q: Can a family member be treasurer of a candidate's committee?

A: Yes, so long as the treasurer is not an appointed public employee.

Q: If an appointed board member in town earns a stipend, is he or she considered a public employee?

A: Yes. Appointed board members who receive stipends are considered public employees and may not solicit or receive campaign contributions.

OCPF REQUEST

When new candidates for state or county office communicate with your office about running this year, please direct them to OCPF.

An important first step is to [organize](#) with OCPF, prior to raising and spending money for the 2022 election. You can assist us by asking them to contact OCPF.

Potential candidates should e-mail OCPF at OCPF@cpf.state.ma.us for information.

CPF M109

We recently debuted this form for local candidates, so we thought it would be helpful to explain its use again.

Instead of filing the M102 or M102-0 forms before and after an election, the M109 form can be filed by a local candidate with no activity, no balances and no committee. It's a declaration that a candidate has no money, and he or she has no plans on raising or spending during the election.

[Click here](#) for the form, which has additional information.

WINTER CONFERENCE - ICED OUT!

We were looking forward to seeing everyone at Devens. However, after consulting with leadership, we thought it best to let members get on the road home early and avoid the slippery highways. We will arrange another session and hopefully see you when it's warmer!
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