

OCPF REPORTS

Massachusetts Office of Campaign and Political Finance

From the Director: William C. Campbell

Running for Office in 2022?

Every year is election year in Massachusetts. It is expected that 2022 will be particularly busy for OCPF with candidates and ballot questions appearing on the state and local ballots across the Commonwealth. If you or someone you know will be involved in a campaign in 2022, the starting point is www.ocpf.us.

The purpose of the campaign finance law is to provide disclosure to the public of money raised and spent by candidates and committees. Legislation sets the parameters for reporting periods and the methods of reporting. OCPF accomplishes its mandate through reporting systems targeted to the particular office, including traditional paper, depository bank and e-filed reports.

Some candidates and committees file reports through the [depository bank system](#).

THE 2022 STATE ELECTION YEAR

OCPF's central focus in the 2022 state election year will be to assist candidates and committees with disclosing campaign finance activity on our website. We anticipate that more than 30,000 campaign finance reports will be filed by candidates and committees during the year, for statewide, legislative and county candidates, as well as PACs, independent expenditure PACs, parties and statewide ballot question committees.

Candidates and PACs: Reports will be filed monthly by their banks to disclose expenditures, as candidates disclose contributions by filing deposit reports after making deposits at the bank.

Statewide ballot questions: The first report disclosing 2022 activity will be filed Sept. 9.

IEPACs: Also known as Super PACs, these committees file reports when they distribute communications to support or oppose candidates.

Local Parties: Will file three reports: pre-primary, pre-election and year-end.

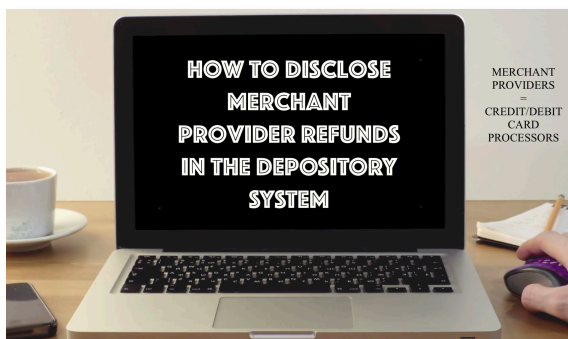
New candidates who run for office in 2022, and PACs and state ballot question committees, should contact OCPF **prior to raising or spending money**. [Click here](#) for access to campaign finance guides, and [here](#) for OCPF's "contact us" page.

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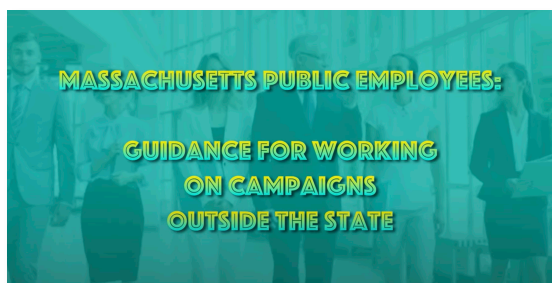
New Educational Videos



Candidates and committees often ask how they can create a database of their past donors. It's easy to do on OCPF's website. [CLICK HERE](#) for a short demonstration.



If your merchant provider refunded a contribution without your knowledge, [watch this video](#) to learn how to disclose that activity. A merchant provider is a company that processes credit and debit card contributions.



Massachusetts public employees sometimes work on federal campaigns. [This video](#) provides guidance for such employees.

Twitter: [@OCPFreports](#)

2021 PAC totals

Traditional political action committees reported raising \$5.2 million and spending \$4.1 million in 2021, a municipal election year.

A PAC is able to contribute up to \$500 per calendar year to a candidate, and accept up to \$500 per calendar year from an individual.

PACs may also make independent expenditures to support or oppose candidates, without limit, so long as the committee does not coordinate its efforts with candidates.

Heading into the 2022 state election year, 255 PACs* reported starting Jan. 1 with \$13.2 million.

The PACs with the largest balances to start 2022:

1. 1199 SEIU MA - \$3,079,052
2. MA & Northern NE Laborers' - \$1,818,191
3. Local 509 Service Employees - \$769,750
4. MA Assoc. of Realtors - \$657,877
5. North Atlantic States Regional Council of Carpenters - \$546,687
6. Massachusetts Dental Society - \$483,136
7. Ironworkers Union Local 7 - \$448,919
8. MA Police Association - \$366,115
9. Boston Police Patrolmens Association - \$359,308
10. Pipefitters Local #537 - \$327,169

PAC reports are available [here](#).

YEAR	RECEIPTS	EXPENDITURES
2021	\$5.2 million	\$4.1 million
2020	\$5.1 million	\$4.5 million
2019	\$5.2 million	\$3.7 million
2018	\$5.9 million	\$4.9 million

*Not including independent expenditure PACs.

Recent Cases and Rulings

OCPF audits all campaign finance reports and reviews all complaints alleging violations of the campaign finance law. These audits and reviews may result in enforcement actions or rulings (below). The identity of any complainant is kept confidential. [Click here for PDF copies of the public resolution letters below.](#)

Public Resolution Letters

A public resolution letter may be issued in instances where the office found “no reason to believe” a violation occurred; where “no further action” or investigation is warranted; or where a subject “did not comply” with the law but, in OCPF’s view, the case is able to be settled in an informal fashion with an educational letter or a requirement that some corrective action be taken. A public resolution letter does not necessarily imply a wrongdoing on the part of a subject and does not require agreement by a subject.

CPF-21-91: Jennifer Macksey, North Adams. Did not comply (public employee); 11/6/2021. Macksey, a candidate for mayor and a public employee, signed a letter encouraging people to attend a fundraiser benefitting her political committee. Public employees may not solicit campaign funds, directly or indirectly. Once Macksey was made aware of the issue, she promptly refunded contributions that were offered in response to the invitations and refused to accept contributions at the event.

CPF-21-143: William Sittig, West Roxbury. No further action (public employee); 11/30/2021. Sittig, a Boston Public Schools employee, shared a fundraising post on his personal Facebook page. Public employees may not solicit campaign funds, directly or indirectly.

CPF-21-69: Leonard Lee, Dorchester. No reason to believe (disclosure); 11/30/2021. Lee, a candidate for Boston City Council, leased two billboards for his candidacy. The owner of the billboards did not immediately bill the Lee Committee, creating the appearance that an expenditure was not disclosed to the public. Once made aware of the issue, the billboard owner billed the committee and the expenditure was disclosed in August.

CPF-21-82: Malo Brown, Springfield. Did not comply (public employee); 12/16/2021. Brown, a Springfield city councilor and public employee, shared fundraising materials on his personal Facebook page for his own committee. Public employees may not solicit campaign funds, directly or indirectly. To resolve the issue, the committee made a donation of \$1,000 to a charity of the candidate’s choice.

**Contact OCPF’s legal team at
617-979-8300 or OCPF@cpf.state.ma.us**



Every function you see on the our website, and every detail within Reporter 7, is developed and maintained in-house by OCPF's tech team - Al Grimes, Xiaoyi An and Hao Feng.

These are some of the features you can or will see this year:

- Calculator for determining reporting periods and due dates on the local level has recently been launched for town and city clerks, and local candidates, [here](#).
- Coming: The ability for local filers to register for Reporter 7 on-line.
- Coming: Gubernatorial race charts on the front page of the OCPF website.
- Coming: Municipal-specific disclosure pages. Each city and town in the state will have a platform where candidate reports can be posted by local election officials, to assist with the statutory requirement to display reports online.

TOWN CANDIDATE TRAINING CLASSES

OCPF is hosting several training classes for town candidates, to review the fundraising, spending and filing rules. The classes are recommended for all town candidates with campaign finance activity.

To attend, e-mail Jason at jtait@cpf.state.ma.us to request a Zoom invitation to the date of your choice.

TOWN CLERKS: Please forward these dates to your candidates. New town clerks and their staffs are also encouraged to attend.

Tuesday, Jan. 25, noon / Monday, Feb. 7, 6 p.m. / Friday, Feb. 25, 9 a.m.
Thursday, March 10, 6 p.m. / Friday, March 18, noon / Tuesday, April 5, noon

2022 FILING SCHEDULE FOR HOUSE AND SENATE CANDIDATES

A candidate's bank will file reports by the 5th of each month, disclosing the deposit total for the month and the itemization of expenditures.

Candidates must itemize contributions (deposits) by filing deposit reports. **OCPF highly recommends filing deposit reports within three days of deposit.** However, the statutory schedule for filing deposit reports is as follows:

Due by April 20, covering Jan. 1 through March 31

Due by July 20, covering April 1 through June 30

Due eight days before the primary election*

Due Oct. 31, eight days before the Nov. 8 general election

*The primary election date has not yet been finalized.



OCPF is holding a training class for traditional political action committees, focusing on issues that arise during a state election year. Individuals who want to learn more about PACs and how they operate and report can e-mail us at OCPF@cpf.state.ma.us to request an invitation to the Zoom training class:
FRIDAY, JAN. 14, Noon

The one-hour class will be helpful for new PAC officers and experienced PAC operators.

Continued: From the Director

The depository candidate offices on the 2022 state election ballot include governor, lieutenant governor, attorney general, secretary of state, state treasurer, state auditor, governor's council, state senator, state representative, district attorney, sheriff and county commissioner. [State ballot question committees](#) register and e-file reports with OCPF. Although not on the ballot, political action committees ([PACs](#)), people's committees and the state parties also report through the depository bank system. Independent expenditure PACs ([IEPACs](#)) file reports as they make expenditures. All of these candidates and their committees must organize with OCPF before raising or spending money on their campaigns. Congressional candidates will be on the ballot in 2022, however their reports are filed with the [Federal Election Commission \(FEC\)](#).

In addition, scores of races will appear on local ballots at annual town elections. These candidates will file with their municipal clerk or election official. Although candidates can file hand-prepared reports, they are encouraged to register and report using the web-based [R7 reporting system](#). This will simplify record keeping and provide printed reports for the candidates to sign and file locally. [Local ballot question committees](#) must register and file reports with their local election official before raising or spending money.

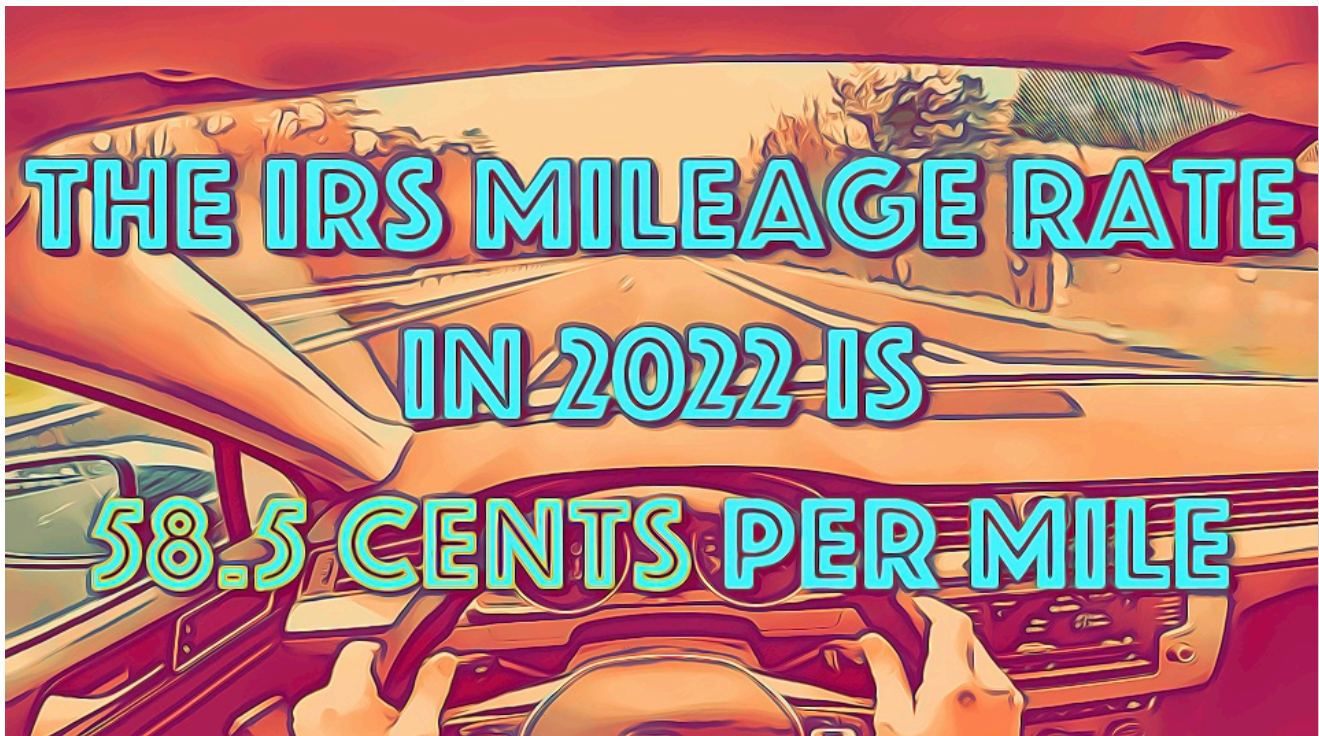
Whichever office is sought or ballot question proposed, starting at the OCPF website will provide candidates and committees with all the information they need to comply with the campaign finance law. OCPF staff are also available by telephone and email to assist you in navigating the requirements for your campaign.

William C. Campbell
Director



Candidates and committees who file campaign finance reports on the local level must provide specific reporting periods, and file by certain deadlines. OCPF has created a calculator that will provide those dates for local election officials, candidates and committees. [CLICK HERE](#) for the calculator.





Candidates and committees may reimburse individuals for the use of their personal vehicles for political purposes at the IRS mileage rate.

The rate in 2022 is 58.5 cents, up from 56 cents in 2021.

When a candidate or committee reimburses an individual for miles, please include a specific purpose for the expenditure in the memo section of the check. Example:

"Mileage reimbursement for travel to Veteran's Day event in Springfield."

Records of miles driven and the purpose should be kept internally by the candidate or committee (mileage log).

Indexing amounts for 2022-23

The campaign finance law requires OCPF to adjust two specific contribution limits every two years based on the Consumer Price Index for the Greater Boston area. The first is the limit on the amount an individual may contribute to a people's committee during a calendar year. The second is the amount of any individual contribution that may be collected (bundled) by regulated intermediaries or conduits.

OCPF has computed the new limit for both at \$191, effective Jan. 1, 2022. [Click here](#) for the full memo.

OCPF Q&A

QUESTION:

**MAY I USE
THE CAMPAIGN
DEBIT CARD
TO FUEL
MY PERSONAL VEHICLE?**

ANSWER:

**NO.
COMMITTEES SHOULD
USE THE IRS
MILEAGE
REIMBURSEMENT RATE
FOR THE USE OF
PERSONAL VEHICLES
FOR CAMPAIGN PURPOSES.**

**I'M AN ELECTED OFFICIAL.
CAN MY CAMPAIGN BUY FLOWERS
FOR AN EVENT AT THE HIGH SCHOOL
TO HONOR TOP STUDENTS?**

**YES. PROVIDING FLOWERS AT A PUBLIC EVENT
ENHANCES A CANDIDATE'S POLITICAL FUTURE
AND IS NOT PRIMARILY PERSONAL.**

OCPF RECEIPTS REMINDER

**CANDIDATES, PARTIES AND PACS MAY NOT
ACCEPT CONTRIBUTIONS (MONETARY OR
IN-KIND) FROM BUSINESSES, SUCH AS
CORPORATIONS, S-CORPS, LLCs, LLPs
AND PARTNERSHIPS.**

**BUSINESSES MAY CONTRIBUTE TO BALLOT
QUESTION COMMITTEES, INDEPENDENT
EXPENDITURE PACS AND SEGREGATED
FUNDS, SUCH AS INAUGURAL FUNDS.**

Sterling, Cooper, Draper & Pryce, LLC
12345 Main Street
Anytown, MA 01234

Date: 6/6/2022

Pay to
The order of: Richard Whitman Committee

\$ \$1,000

One thousand dollars

Dollars

For:

Larry Pryce

Authorized Signature

2022 Public Finance Program

OCPF anticipates that approximately \$1 million will be available for the 2022 election cycle.

- Available only to eligible statewide candidates.
- By statute, gubernatorial candidates are funded first and remaining funds, if any, are distributed to other candidates.
- To qualify, candidates must agree to statutory expenditure limits:

<u>Limit in the primary election campaign:</u>		<u>Limit in the general election campaign:</u>	
Governor	\$1,500,000	Governor and Lieutenant Governor	\$1,500,000
Lieutenant Governor	625,000	Attorney General	625,000
Attorney General	625,000	Secretary	375,000
Secretary	375,000	Treasurer and Receiver General	375,000
Treasurer and Receiver General	375,000	Auditor	375,000
Auditor	375,000		

To be eligible to receive matching funds, participating candidates must also reach **minimum fundraising thresholds**:

Primary Election: Governor - \$75,000 / Lt. Gov - \$15,000 / Attorney General - \$37,500 / Secretary - \$15,000 / Treasurer - \$15,000 / Auditor - \$15,000

General Election: Governor & Lt. Gov. - \$125,000 / Attorney General - \$62,500 / Secretary - \$25,000 / Treasurer - \$25,000 / Auditor - \$25,000

Only the first \$250 of an individual's contributions from 2021 and 2022 can be considered a qualifying contribution.

- **IMPORTANT:** Every statewide candidate, whether they plan to participate in the public finance program or not, **MUST** file a statement with OCPF declaring their intention to either agree to spending limits or not agree to spending limits. **CANDIDATES THAT DO NOT FILE THIS STATEMENT WILL NOT APPEAR ON THE PRIMARY OR GENERAL ELECTION BALLOT.** For candidates enrolled in a political party, this statement will be due by June 7, 2022. Candidates not enrolled in a political party will be required to file the statement by Aug. 30, 2022. OCPF will provide each candidate with the statement and will assist candidates and their committees to ensure timely filing.
- Click [here](#) for an overview of the 2022 public finance program.

NEW FORM FOR TOWN/CITY CANDIDATES WITH NO ACTIVITY (LOCAL FILERS)



Commonwealth
of Massachusetts

File with: Local Election Official (City or Town Clerk)

Form CPF M109: Statement of Municipal Candidate Not Raising or Expending Campaign Funds Office of Campaign and Political Finance

The new CPF [M109](#) form is for candidates who file locally and have no financial activity, no balances and no committee.

Some candidates, especially in towns, may never raise or spend money, but are still required to file campaign finance reports with "zero" activity each reporting period.

This form is filed in lieu of the pre-preliminary, pre-election and post-election reports.

Candidates are still required to file the year-end report, due each Jan. 20, even if they had no activity and filed the CPF M109 form.

Candidate's Name:			
Office Sought:			
Residential Address:			
City / State / Zip:			
E-Mail Address:		Phone Number:	

I hereby certify that I have not opened a campaign bank account for campaign funds because I do not intend to accept contributions or in-kind contributions, make expenditures, **including expenditures of my own funds**, or incur liabilities for any campaign-related purpose, **nor do I currently have any outstanding liabilities for prior campaign-related activity**. I submit the following as my campaign report for all bank reporting periods in this calendar year as provided for in Chapter 55 of the Massachusetts General Laws:

1. Ending balance from previous report	ZERO
2. Total receipts for reporting period	ZERO
3. Subtotal	ZERO
4. Total Expenditures for reporting period	ZERO
5. Ending balance	ZERO

After filing this statement, **if I decide to raise, accept, or expend funds, or incur liabilities, for a campaign-related purpose, I will immediately notify my local election official in writing**, and will file periodic campaign finance reports according to the statutory filing schedule.

Until such notice is on file with the local election official, I certify that the above Zero report will be in effect for each reporting period, **in the calendar year in which it is filed**, required by Chapter 55 of the Massachusetts General Laws.

This form is valid through December 31 of the year in which it was signed.

SIGNED UNDER THE PENALTIES OF PERJURY:

Candidate's signature: _____

Date: _____

M109 12/21

LOCAL PARTY COMMITTEE TRAINING DATES

OCPF will host three special training classes for local party committee treasurers and officers.

The optional one-hour class will review how to raise and spend money, and how to file reports with OCPF.

This class is recommended for anyone involved in operating a local party committee.

Please e-mail jtait@cpf.state.ma.us for a Zoom invitation.

Tuesday, March 8, 6 p.m.

Monday, March 14, 9 a.m.

Thursday, March 24, 6 p.m.

Changes to the state's campaign finance regulations

OCPF will propose changes to the state's campaign finance regulations this winter.

The proposed changes will be posted to the OCPF website at www.ocpf.us, with additional information on the agency social media pages.

Jan. 25: The proposed regulations will be posted to the website, and a notice for a public hearing published in a newspaper.

Feb. 15: Public hearing, 2 p.m. via Zoom.

Recent changes in the campaign finance law (Chapter 123 of the Acts of 2019) modified reporting requirements for candidates and political committees. The revised regulations will make the regulations consistent with the statute. In addition, the revised regulations will clarify existing regulations, address changes in agency practice, and respond to frequently raised questions.

Contact Jason Tait at jtait@cpf.state.ma.us for an invitation to the Zoom meeting.

WHAT'S THIS?



OCPF Reporter 7 Home Reports Tools

12/20/2021 Deposit (#454) *Tank Dep Committee (40024)*

This report is a draft. It will not be considered e-filed until it is complete and file it.

Summary Deposit Items Fees CC Contribution Refunds

Export to PDF Upload Data Delete

OCPF's depository filers may have noticed a new tab on the summary page of their deposit reports.

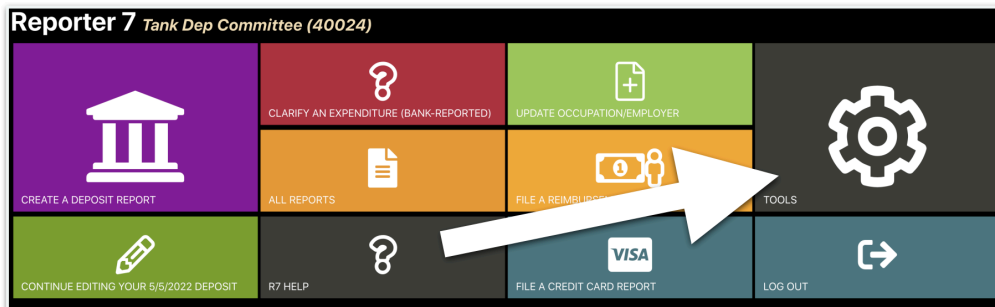
This new tool allows a candidate or committee to accurately reflect contributions that have been refunded directly by merchant providers, the entities that collect credit and debit card contributions.

[CLICK HERE](#) for a demo video on how to disclose contributions that were directly refunded to a contributor by a merchant provider.

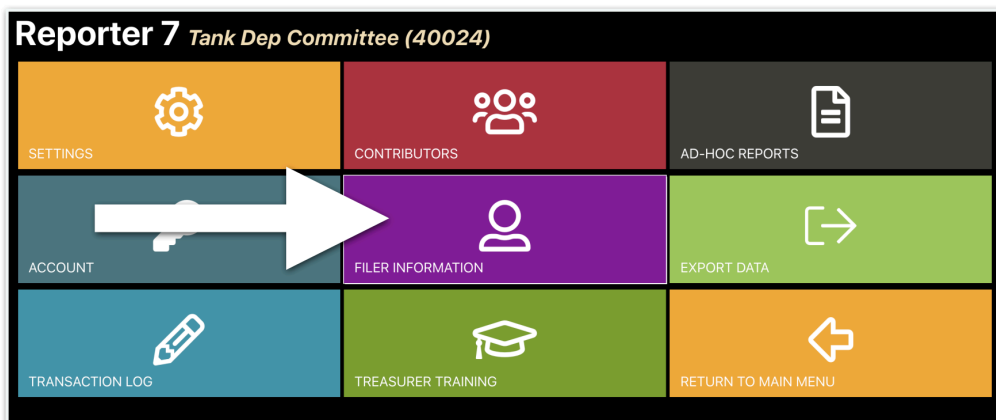
You may need direct assistance the first few times you use the tool. Please contact an OCPF auditor at 617-979-8300, and he or she can talk you through the process.

How do I update my e-mail address with OCPF?

1. Log into Reporter 7 and click the “tools” tile



2. Click the “filer information” tile



3. Update the e-mail address and click the save button at the bottom of the page

 A screenshot of the 'Candidate Information' form. The form contains several input fields: 'Name' (with 'Committee' and 'Depository' dropdowns), 'Address' (with 'Street Address', 'City', 'State' (set to MA), and 'Zip' dropdowns), 'Phone #' (with 'Candidate Phone #' dropdown), 'E-mail Address' (with the text 'jasonforcitycouncil@gmail.com'), 'Party Affiliation' (with 'Democratic' dropdown), and 'Office/District' (with 'N/A, N/A' text). A white arrow points to the 'E-mail Address' field. There is also an 'Upload filer photo' button at the top.

Nearly all of OCPF's communications with candidates and committees are by e-mail.

It is very important that candidates and committees provide OCPF with e-mail addresses that are checked frequently.

Please ensure that correct and frequently-checked e-mail addresses are on file with OCPF.

We also ask that OCPF is marked as a “safe sender” so our e-mails are not blocked by SPAM filters.