Shaping The Future:
IRC Candidate Workshop 2022

IMPORTANT: Information in this presentation is subject to change upon passage of new legislation

This Power Point presentation is available on the Indian River County Supervisor of Elections website:

www.voteindianriver.com

Review your handout for
2022 Elections Dates Calendar

2022 Elections

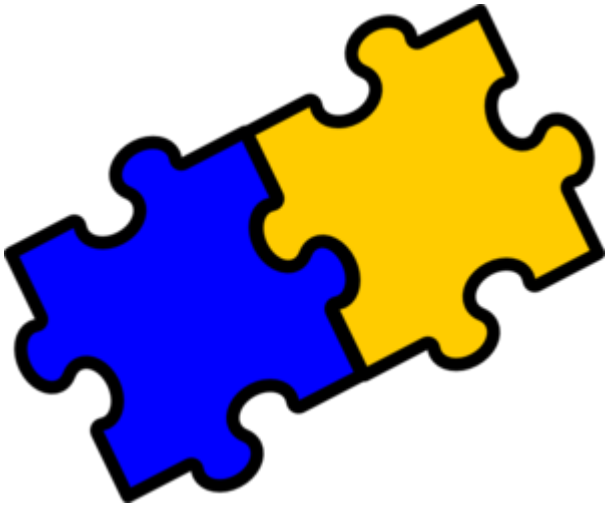
Primary Election: Aug. 23, 2022
Book Closing: July 25, 2022

General Election: Nov. 8, 2022
Book Closing: Oct. 11, 2022

Becoming a Candidate

Becoming a candidate is a two-part process:

- ✓**Filing for office**
- ✓**Qualifying for office**



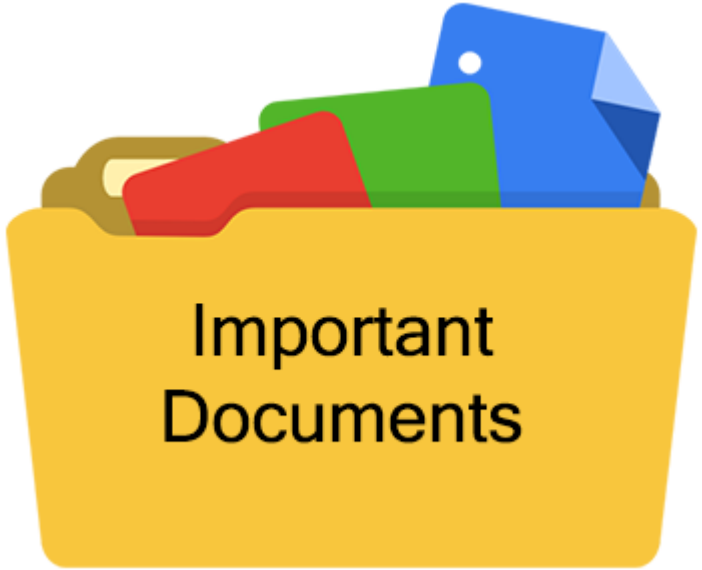
Becoming a Candidate

Two forms are required to become a candidate:

- **DS-DE 9: Appointment of Campaign Treasurer Designation of Campaign Depository for Candidates**

- **DS-DE 84: Statement of Candidate**

FILING FOR OFFICE



Filing Officer: SOE

The SOE is the local filing officer

***Exception*: Municipal candidates**

IRC Candidate Requirements

Prior to submitting the DS-DE 9 form, IRC candidates must be:

- **Registered voter in IRC**
- **Legal resident of the district they are representing when assuming office**

Exception: **School Board and write-in candidates must be legal residents of their district at qualifying**

DS-DE 9 Form:

Appointment of Campaign Treasurer Designation of Campaign Depository for Candidates

Candidates <u>must</u>:

- **Designate a primary campaign depository**
- **Appoint a treasurer and/or deputy treasurer(s)**
- **File with the SOE office *<u>prior</u>* to opening a bank account (Banks require a clocked-in copy of the form)**

Prior to Submission of DS-DE 9

DO NOT:

- Accept contributions
- Make expenditures
- Accept signed petitions

PLEASE LOOK AT YOUR NEXT HANDOUT PAGE

Who signs the DS-DE 9?

- Candidate
- Campaign Treasurer
- Deputy Treasurer(s)

APPOINTMENT OF CAMPAIGN TREASURER AND DESIGNATION OF CAMPAIGN DEPOSITORY FOR CANDIDATES
(Section 106.021(1), F.S.)

(PLEASE PRINT OR TYPE)

NOTE: This form must be on file with the qualifying officer before opening the campaign account.

OFFICE USE ONLY

1. CHECK APPROPRIATE BOX(ES):
☐ Initial Filing of Form Re-filing to Change: ☐ Treasurer/Deputy ☐ Depository ☐ Office ☐ Party

2. **Name of Candidate** (in this order: First, Middle, Last)

3. Address (include post office box or street, city, state, zip code)

4. Telephone ( )

5. E-mail address

6. **Office sought** (include district, circuit, group number)

7. **If a candidate for a nonpartisan office, check if applicable:**
☐ My intent is to run as a Write-In candidate.

8. **If a candidate for a partisan office, check block and fill in name of party as applicable:** My intent is to run as a
☐ Write-In ☐ No Party Affiliation ☐ _____ Party candidate.

9. **I have appointed the following person to act as my** ☐ Campaign Treasurer ☐ Deputy Treasurer

10. Name of Treasurer or Deputy Treasurer

11. Mailing Address

12. Telephone ( )

13. City

14. County

15. State

16. Zip Code

17. E-mail address

18. **I have designated the following bank as my** ☐ Primary Depository ☐ Secondary Depository

19. Name of Bank

20. Address

21. City

22. County

23. State

24. Zip Code

UNDER PENALTIES OF PERJURY, I DECLARE THAT I HAVE READ THE FOREGOING FORM FOR APPOINTMENT OF CAMPAIGN TREASURER AND DESIGNATION OF CAMPAIGN DEPOSITORY AND THAT THE FACTS STATED IN IT ARE TRUE.

25. Date

26. Signature of Candidate
X

27. **Treasurer's Acceptance of Appointment** (fill in the blanks and check the appropriate block)

I, _____, do hereby accept the appointment
(Please Print or Type Name)

designated above as: ☐ Campaign Treasurer ☐ Deputy Treasurer.

_____ X _____
Date Signature of Campaign Treasurer or Deputy Treasurer

DS-DE 9 (Rev. 10/10) **Rule 1S-2.0001, F.A.C.**

Filling Out the DS-DE 9

- Form must be signed and dated by the candidate and treasurers (no more than 3 deputy treasurers)
- Depository must be a Florida authorized bank, savings & loan, or credit union
- May open a separate interest-bearing account

Candidates: Consider being a treasurer or deputy treasurer in order to sign campaign checks

What if my treasurer resigns?

Resignation or removal of a treasurer and/or deputy treasurer:

- **Must be in writing**
- **Not effective until filed with the SOE**

PLEASE LOOK AT YOUR NEXT HANDOUT PAGE

DS-DE 84 Form
Statement of Candidate

STATEMENT OF CANDIDATE

(Section 106.023, F.S.)

(Please print or type)

OFFICE USE ONLY

I, _____ ,

candidate for the office of _____ ;

have been provided access to read and understand the requirements of

Chapter 106, Florida Statutes.

X _____ _____

Signature of Candidate Date

Each candidate must file a statement with the qualifying officer within 10 days after the Appointment of Campaign Treasurer and Designation of Campaign Depository is filed. Willful failure to file this form is a first degree misdemeanor and a civil violation of the Campaign Financing Act which may result in a fine of up to $1,000, (ss. 106.19(1)(c), 106.265(1), Florida Statutes).

DS-DE 84 (05/11)

Statement of Candidate, Form DS-DE 84

This statement acknowledges that the candidate has been provided access to read and understand the requirements of Chapter 106, F.S. (campaign finance)

Must be filed with the supervisor of elections(SOE) within 10 days of filing DS-DE 9

-Although the DS-DE84 is not a requirement for qualifying, failure to file the form within 10 days is a violation subject to referral to the Florida Elections Commission.

QUALIFYING FOR OFFICE

3 Ways to Qualify as a Candidate

- Pay a qualifying fee
- Petition process
- Write-in candidate

Qualifying Officer: SOE

- Responsibility is ministerial in nature only
- Examines the face of qualifying papers
- Reviews documents to determine they are properly completed
- May not determine whether contents of papers are accurate
- Accepts documents if in proper order

April Pre-Qualifying & Qualifying Weeks

Offices that qualify with the Florida Division of Elections:

- **US Senator**
- **US Representative**
- **State Attorney**
- **Public Defender**
- **Judicial candidates (except County Court Judges)**

Office that qualifies with IRC SOE:

- **County Court Judges**

April 2022						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

<u>Pre-qualifying</u>: April 11 through April 22, 2022

<u>Qualifying</u>: Noon, April 25 through Noon, April 29, 2022

June Pre-Qualifying & Qualifying Weeks

Offices that Qualify with the Florida Division of Elections:

- **Statewide**
- **Multi-County candidates (Sebastian Inlet Taxing District)**

Offices that Qualify with IRC SOE:

- **Constitutional Officers**
- **County Commissioners**
- **School Board**
- **IRC Hospital District**
- **IRC Soil & Water Management**
- **IRC Mosquito Control**

June 2022

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

<u>Pre-qualifying</u>: May 31 through June 10, 2022

<u>Qualifying</u>: Noon, June 13 through Noon, June 17, 2022

Laws that may affect candidates

Resign to Run

Affects a current officer who is seeking another public office if both terms overlap, officer must resign from current office

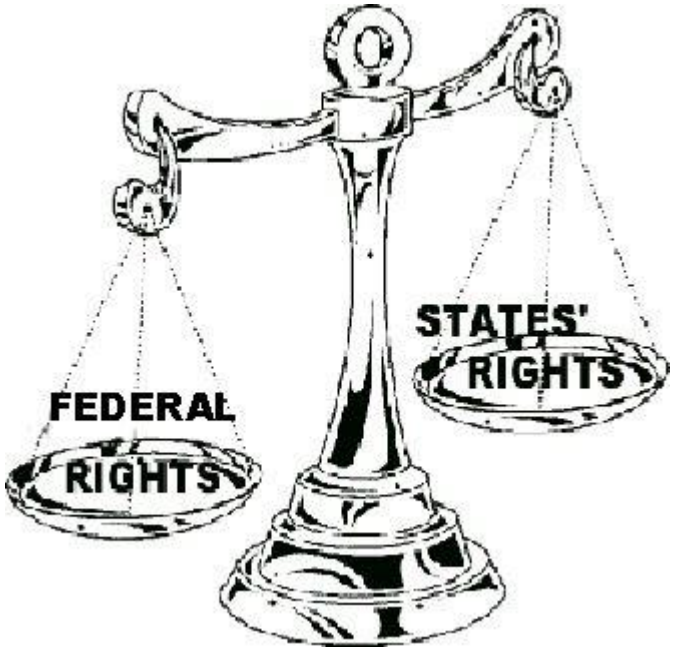
- **seek DOE opinion**

Federal Hatch Act

Restricts political activity if the employee's entire salary is completely funded from federal dollars

Employee is precluded from being a candidate for public office in a partisan race

- **seek DOE opinion**



Political Party Candidates

May not have been a registered member of any other political party for:

365 days before the beginning of qualifying preceding the general election for which the person seeks to qualify

May run as a no-party affiliate without changing party affiliation

Qualifying Fees

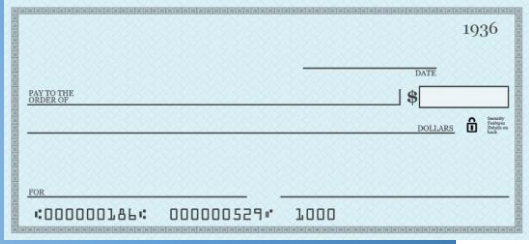
Based on salary of office sought as of preceding July 1st

- **Partisan candidates: 6%**
- **Non-partisan candidates: 4%**

***Exception*: Fee is $25 for special district candidates**

How do I pay fees?

Campaign check signed by the campaign treasurer or deputy treasurer



Candidates may sign the check

if they are a treasurer or deputy treasurer

Not acceptable: Cashiers check, personal check or money order

Exception: Personal check is OK for special district candidates

Returned fees

Fees are returned if the candidate:

- **Withdraws prior to last date to qualify**
- **Deceases prior to the last date to qualify, then the candidate's beneficiary is entitled to the fee**
- **Fails to qualify**

Petition Process

- **No qualifying fee**
- **1,246 valid petitions**
  (Based on 1% of active voters in the 2020 general election)
- **Submit petitions to:**

<u>Local candidates</u>: IRC SOE office

<u>Multi-county candidates</u>: County where voter is registered

Candidate is responsible for submitting petitions to the correct county

Petition Verification Fees

- Fee is 10 cents per petition
- Fee can be paid by:
  - Campaign check
  - Petty cash
  - Third party, reimbursed by campaign
- Candidate is responsible for providing an accurate count
- Payment is required when submitting petitions
- All petitions submitted to SOE are verified

Petition Due Date

Deadlines for submitting petitions for verification:

- ✓ **April qualifying: Noon, March 28, 2022**
- ✓ **June qualifying: Noon, May 16, 2022**

PLEASE LOOK AT YOUR NEXT HANDOUT PAGE

Petitions:
Form DS-DE 104

Petitions must contain:

- **Name of candidate**
- **Party designation**
- **Office, including district, circuit, group or seat number, if applicable**

Petition Requirements

Valid petitions must be signed by registered voters and include:

- ✓ **Name**
- ✓ **Date of birth or voter registration number**
- ✓ **Address, including city and county**
- ✓ **Signature and date signed**

DS-DE 104

CANDIDATE PETITION

Notes: - *All information on this form becomes a public record upon receipt by the Supervisor of Elections.*
- *It is a crime to knowingly sign more than one petition for a candidate. [Section 104.185, Florida Statutes]*
- *If all requested information on this form is not completed, the form will not be valid as a Candidate Petition form.*

I, _____ the undersigned, a registered voter
(print name as it appears on your voter information card)

in said state and county, petition to have the name of _____

placed on the Primary/General Election Ballot as a: [*check/complete box, as applicable*]

☐ Nonpartisan ☐ No party affiliation ☐ _____ Party candidate for the office of

_____
(insert title of office and include district, circuit, group, seat number, if applicable)

Date of Birth (MM/DD/YY)	or Voter Registration Number	Address	
City	County Indian River	State FL.	Zip Code

Signature of Voter	Date Signed (MM/DD/YY) [*to be completed by Voter*]

Rule 1S-2.045, F.A.C.

DS-DE 104 (Eff. 09/11)

Be sure to verify the date of birth for accuracy

Certificate of Petition Qualifying

Leslie R. Swan
Supervisor of Elections
Indian River County

PETITION CERTIFICATION
FOR
PETITION PROCESS OF QUALIFYING

STATE OF FLORIDA
COUNTY OF INDIAN RIVER

DATE: _____

I, Leslie Swan, Supervisor of Elections of Indian River County, Florida, do hereby certify that

_____, Candidate for Indian River County _____, submitted

_____petition signatures.

I further certify that _____ of those signatures were qualified electors in Indian River County.

_____
Leslie Rossway Swan
Supervisor of Elections

Issued when required # of valid petitions are verified

Oath of Undue Burden:

DS-DE 19A

AFFIDAVIT OF UNDUE BURDEN
(Section 99.097(4), Florida Statutes)

IMPORTANT: (1) Paying signature gatherers will preclude or invalidate the filing of an undue burden oath. Section 99.097(6), Florida Statutes, provides: (a) If any person is paid to solicit signatures on a petition, an undue burden oath may not subsequently be filed in lieu of paying the fee to have signatures verified for that petition. (b) If an undue burden oath has been filed and payment is subsequently made to any person to solicit signatures on a petition, the undue burden oath is no longer valid and a fee for all signatures previously submitted to the supervisor of elections and any submitted thereafter shall be paid by the candidate, person, or organization that submitted the undue burden oath. If contributions as defined in s. 106.011 are received, any monetary contributions must first be used to reimburse the supervisor of elections for any signature verification fees that were not paid because of the filing of the undue burden oath. [Note: The second sentence in (b) applies only when payment is made to a signature gatherer after an undue burden oath had been filed.]
(2) Upon a candidate terminating the campaign, any candidate who qualified by the petition process and who has surplus funds, must first apply the surplus funds to the reimbursement of the signature verification fee (if applicable). *See* s. 106.141(7), Florida Statutes.

****

I certify under oath that I intend to qualify as a candidate for the office of _____ and that I am unable to pay the fee for verification of petition signatures for that office without imposing an undue burden on my personal resources or on resources otherwise available to me.

X _____ _____
Signature of Candidate **Print Candidate's Name**

_____ _____
Address **City**

_____ _____ ( )_____
State **Zip** **Telephone Number**

State of Florida
County of _____

Sworn to (or affirmed) and subscribed before me this _____ **day of** _____, **20**___
by _____.

Personally Known: _____ or

Produced Identification: _____

Type of Identification Produced:

_____

_____
Signature of Notary Public – State of Florida
Print, Type or Stamp Commissioned Name of Notary Public

DS-DE 19A (Rev. 6/15)

Candidate must file "Oath of Undue Burden"

No charge for verification of signatures

Write-In Candidate

- Not required to pay a qualifying fee or submit petitions
- Must comply with finance laws
- Must reside in the district at qualifying
- Qualify for general election ballot only
- Name will <u>not</u> appear on ballot

Qualifying Forms

- Candidate oath (SOE will provide correct oath)
- Name on oath is name printed on the ballot
- Party affiliation
- Properly notarized

Nickname on Candidate Oath

- First name, shortened version of first name or nickname:

✓ Rob" instead of "Robert" is OK
✓ Robert "Rob" Smith is OK
✓ Robert "Buzz" Smith is OK

- May <u>not</u> use descriptive information, such as esquire, doctor, reverend, etc.

Financial Disclosure Forms:

Form 1 and Form 6

- **SOE will provide proper form**
- **Form 1: requires less information**
- **Form 6: requires detailed information**

Why Financial Disclosure Forms?

- Only a snap shot of “financial situation” to disclose certain assets and sources of income

- Not the same as a “financial statement”
- Monitors potential conflicts of interest
- Deters activity that may result in conflict of interest

Candidate Information Checklist

- Public test notification
- Poll watcher information
- Political signage information
- Candidate handbook
- Canvassing board dates

Qualifying ends and the fun begins

- Qualifying ends June 17, 2022 at noon
- Qualifying for judicial candidates ends April 29, 2022 at noon

No corrections can be made to qualifying papers after the close of qualifying

CAMPAIGN FINANCE RULES

Common FEC Violations

- Taking contributions or making expenditures before filing the DS-DE 9 Form

- Giving incomplete or false information on campaign reports (others are watching)

Campaign Treasurer

- Campaign treasurer should have some basic bookkeeping and computer skills
- It is imperative that the campaign treasurer reviews every bank statement when it is received
- Maintain accurate record keeping

Treasurer's Duties

Keep Detailed Accounts

- **Deposit funds within 5 business days**
- **Bank slip <u>must</u> include the name of each contributor**
- **Preserve accounts (term of office = years preserved)**

Record all Transactions

All transactions must be recorded in the campaign finance report:

- **Contribution**
- **Expenditures**
- **Bank fees**
- **Other fees, such as Pay Pal service fees**

Be Aware

Campaign reports must be filed on time by the treasurer or deputy treasurer

Fined for:

- **Not filing a report**

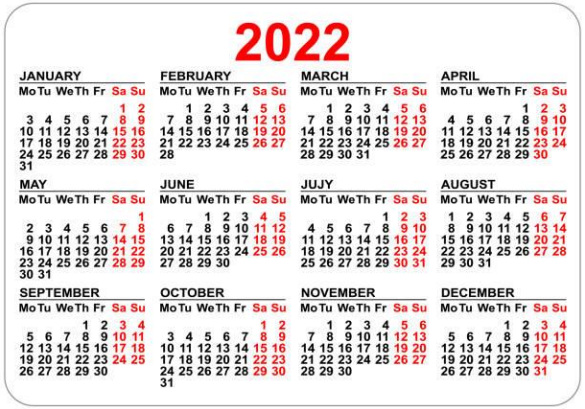
Fines must be paid from candidate's personal funds

Campaign accounts can be inspected before, during or after an election by a DOE or FEC representative.

When are reports due?

- Reports are due on the **10th** day following the end of each calendar month after filing for office

- Frequency of reports increases <u>after</u> the qualifying period:
  - ✓ Non-election year: 12 reports are due
  - ✓ Election year: 20 reports are due



Fines are Hefty for Late Reports

First 3 days: $50 per day

After first 3 days: $500 per day

Reports immediately preceding primary and general elections: $500 per day

Fines cannot exceed 25% of total receipts or expenditures, whichever is greater.

Fines must be paid within 20 days of notice of payment due.

No contributions or expenditures in reporting period?

Required to file a "Waiver of Report"

WAIVER OF REPORT
(Section 106.07(7), F.S.)

(PLEASE TYPE)

OFFICE USE ONLY

Name | Office Sought

Address | City | State | Zip Code

☐ Candidate ☐ Political Committee ☐ Party Executive Committee

NOTE: This form does not apply to an electioneering communications organization (ECO). An ECO must file a report (not a waiver) that no reportable contributions or expenditures were made during the reporting period (s. 106.0703(6), F.S.).

☐ Check here if address has changed since last report. ☐ Check here if PC has DISBANDED and will no longer file reports.

TYPE OF REPORT (Check Appropriate Box and Complete Applicable Line beneath Box)

☐ MONTHLY REPORT ☐ PRIMARY ELECTION ☐ GENERAL ELECTION ☐ OTHER REPORT TYPE

Indicate report # M_____ | Indicate report # P_____ | Indicate report # G_____ | Indicate report type and # as applicable: _____

☐ TERMINATION REPORT ☐ SPECIAL ELECTION

NOTIFICATION OF NO ACTIVITY IN CAMPAIGN ACCOUNT FOR THE REPORTING PERIOD OF

_____ THROUGH _____

X _____ Signature | _____ Date

X _____ Signature | _____ Date

REQUIRED SIGNATURES FOR:
Candidates: Candidate and Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.)
Political Committees: Chairman and Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.)
Party Executive Committees: Treasurer and Chairman (s. 106.29(2), F.S.)

Except as noted above for an ECO, in any reporting period when there has been no activity in the account (no funds expended or received) the filing of the required report is waived. However, the filing officer must be notified in writing on the prescribed reporting date that no report is being filed.

DS-DE 87 (Rev. 06/15)

Incomplete Reports

- All reports are accepted on a conditional basis
- We will notify you if a report is incomplete
- Amended report is due within 7 days
- Amended report must include updated information to complete the report

CAMPAIGN FINANCE: CONTRIBUTIONS

What is considered a contribution?

A gift, subscription, conveyance, deposit, loan, payment or distribution of money or anything of value, including contributions in-kind, made for the purpose of influencing the results of an election

Contribution exceptions

Exceptions include:

- ✓ **Services by volunteers (no compensation)**
- ✓ **Editorial endorsements**

All contributions <u>must</u> be reported, regardless of whether it's 50 cents or $1,000

Reporting Contributions

Reporting for each contribution. must list:

- Full name
- Address
- Specific occupation (individual), if contribution is more than $100
- Principal type of business (corporation), if contribution is more than $100
- Amount
- Date

Be sure to report any transfer of funds or loans

Contribution limits for candidates

- **<u>$3,000</u> per candidate for statewide office, retention as a Justice of the Supreme Court**
- **<u>$1,000</u> for a:**

  - ✓ **Candidate**
  - ✓ **Retention as a Judge of a District Court of Appeal**
    County Court Judge or Circuit Judge
  - ✓ **Legislative office**
  - ✓ **Multicounty office**
  - ✓ **Countywide office**
  - ✓ **Any election conducted on less than a countywide basis**

When to Stop Accepting Contributions

Candidates may not accept contributions after:

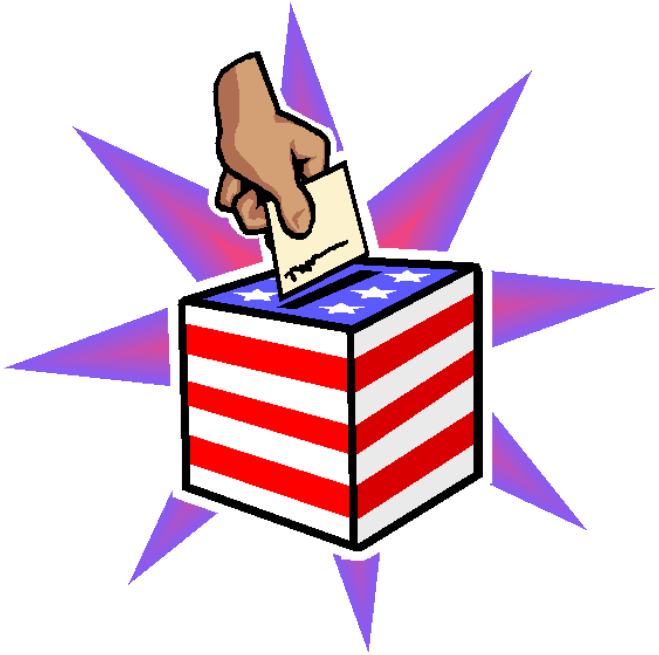
- The date the candidate withdraws his or her candidacy
- Is defeated
- Becomes unopposed
- Is elected

Contribution Limits

Exception: Contribution limits do not apply to contributions by a candidate to his or her own campaign

REMEMBER!

The primary and general elections are separate elections



Debit and Credit Card Contributions

A candidate may accept contributions via:

- Credit card
- Debit card
- Money order

Categorized as a “check” for reporting purposes

Cash Contributions

A cash contribution may not exceed $50 per election

Note: Money orders and traveler's checks are not considered "cash"

In-kind Contributions

Anything of value made for the purpose of influencing the results of an election

Candidates may give unlimited in-kind donations to their own campaign

In-kind contributions:

- **Must be reported using a fair market value**
- **Are subject to contribution limits**

Exceptions to In-kind Contributions

- **Personal services provided without compensation by volunteers**

- **Independent expenditures, as defined in Section 106.011(5)F.S.**

- **Endorsements of 3 or more candidates by political committees or parties**

Anonymous Contributions

- **Must be reported as an anonymous contribution**
- **A letter should be submitted to the filing officer explaining the circumstances surrounding acceptance of an anonymous contribution**
- **Candidate <u>cannot</u> spend the anonymous contribution, but at the end of the campaign, can donate funds to the appropriate entity under 106.141 F.S.**

Joint Accounts

When a candidate receives a contribution in the form of a check drawn on a joint account, the person signing the check is considered the contributor

Fundraisers

- All monies and contributions received from campaign fundraisers are campaign contributions

- Subject to contribution limits

Unauthorized Contributions

Any contribution received on the day of the election or less than 5 days before the day of the election <u>must</u> be returned to the contributor and <u>may not</u> be used or expended by or on behalf of the candidate

Form DS-DE 2: Returning Contributions

If the contribution has been deposited into the campaign account:

- **Report the contribution returned on Form DS-DE 2**
- **Write a check from the campaign account to the contributor for the amount of the contribution**

CONTRIBUTIONS RETURNED

(Section 106.07(4)(c), F.S.)

(PLEASE TYPE)

OFFICE USE ONLY

This report applies only to contributions received by any candidate, committee, or organization but returned to the contributor before being deposited in the campaign account.

☐ Candidate ☐ Committee or Organization

Full Name: _____

Full Address: _____

Full Name and Address of Contributor:	Full Name and Address of Contributor:
Amount of Contribution: $ _____	Amount of Contribution: $ _____
Date Received: _____	Date Received: _____
Date Returned: _____	Date Returned: _____
Full Name and Address of Contributor:	Full Name and Address of Contributor:
Amount of Contribution: $ _____	Amount of Contribution: $ _____
Date Received: _____	Date Received: _____
Date Returned: _____	Date Returned: _____

I CERTIFY THAT I HAVE EXAMINED THIS REPORT AND IT IS TRUE, CORRECT AND COMPLETE.

_____

Type or Print Name of Candidate, Treasurer or Chairman

X _____

Signature

DS-DE 2 (Rev. 12/19)

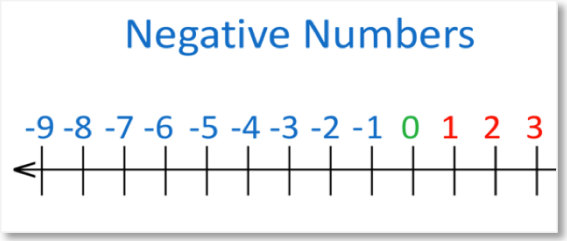
RESET PRINT

Returning Contributions

- Report returned contributions

- Use the itemized contribution report to record the contribution type as "refund"

- Returned contributions are reported as a negative



Candidates Changing Designated Office

If a candidate changes the designated office for which they are a candidate:

- **<u>Must</u> submit a new Form DS-DE 9 and a written statement to SOE filing officer**
- **<u>Must</u> notify all contributors in writing of intent to seek a different office**
- **<u>Must</u> offer to return pro rata and, upon request, return the contribution within 30 days of the notification**

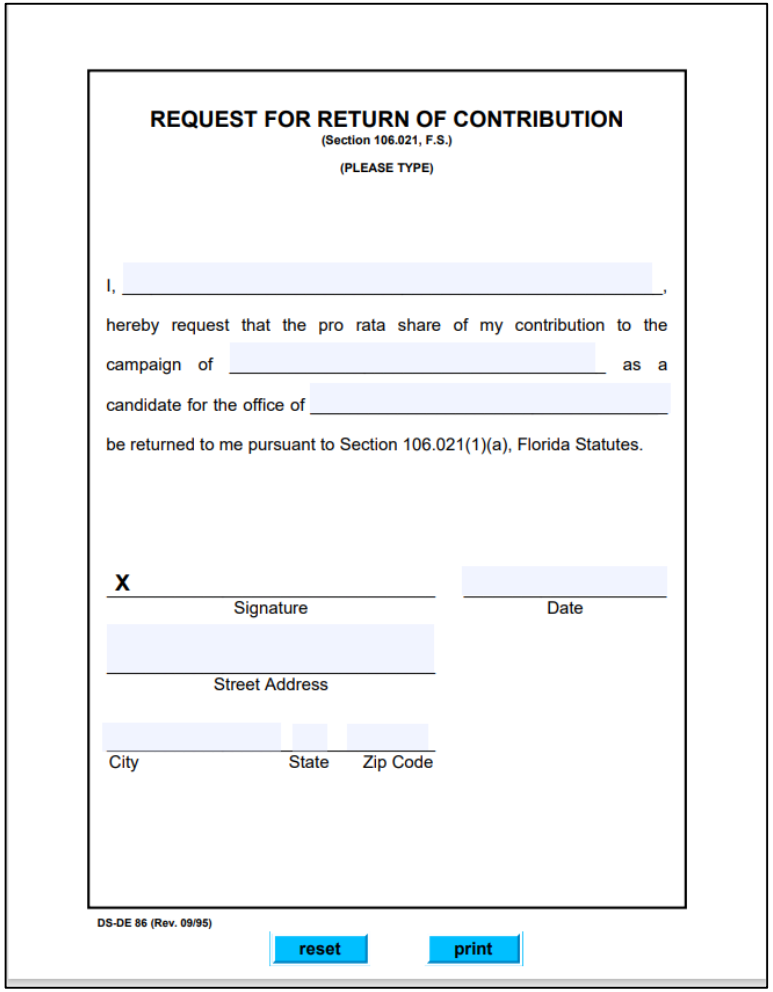
Candidates Changing Designated Office

- **May use the contribution if the donor does not request the contribution be returned within the 30-day period**

- **The amount of the prior contribution for the former office counts toward the contribution limit for the new office**

Form DS-DE 86:

Request for Return of Contribution



REQUEST FOR RETURN OF CONTRIBUTION
(Section 106.021, F.S.)

(PLEASE TYPE)

I, _____,

hereby request that the pro rata share of my contribution to the campaign of _____ as a candidate for the office of _____

be returned to me pursuant to Section 106.021(1)(a), Florida Statutes.

X _____ Signature

_____ Date

_____ Street Address

_____ City _____ State _____ Zip Code

DS-DE 86 (Rev. 09/95)

reset print

If a contributor would like a refund, use the DS-DE 86 form to request the return of the contribution

Loans

- **Loans are considered contributions and are subject to contribution limitations**

  <u>Exception</u>: Loans made by a candidate to his or her own campaign are not subject to contribution limits

- **A candidate making a loan to his or her campaign may be reimbursed for the loan at any time the campaign account has sufficient funds**

- **Loans must be reported on the campaign treasurer's report**

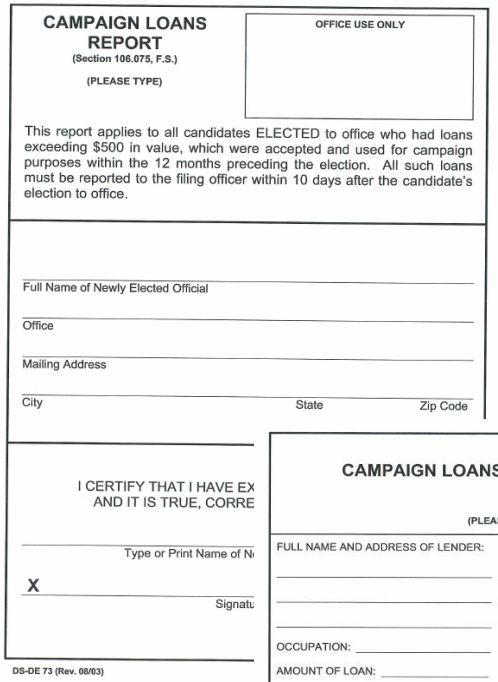
Treasurer Report

Form DS-DE 73:

Campaign Loans Report

All personal loans <u>exceeding</u> $500 in value, made in the 12 months preceding a candidate's election to office, must file the DS-DE 73 form

Any person who makes a contribution to pay all or part of a loan incurred in the 12 months preceding the election, to be used for the campaign, may not contribute more than the amount allowed by law



CAMPAIGN LOANS REPORT
(Section 106.075, F.S.)
(PLEASE TYPE)

OFFICE USE ONLY

This report applies to all candidates ELECTED to office who had loans exceeding $500 in value, which were accepted and used for campaign purposes within the 12 months preceding the election. All such loans must be reported to the filing officer within 10 days after the candidate's election to office.

Full Name of Newly Elected Official

Office

Mailing Address

City State Zip Code

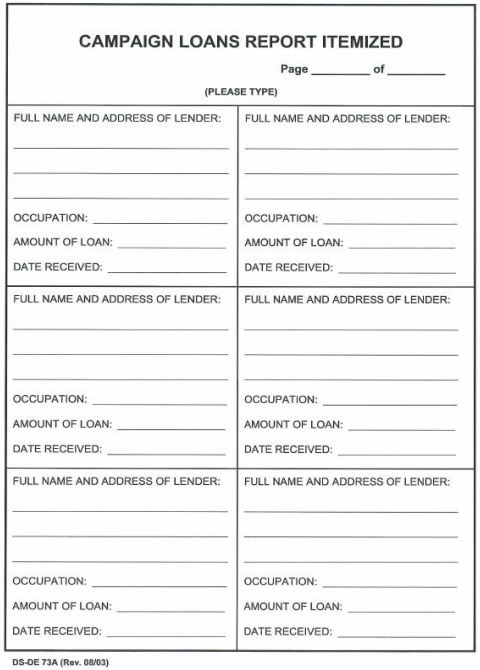
I CERTIFY THAT I HAVE EX
AND IT IS TRUE, CORRE

Type or Print Name of N

X

Signatu

DS-DE 73 (Rev. 08/03)



CAMPAIGN LOANS REPORT ITEMIZED

Page _____ of _____

(PLEASE TYPE)

FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
DATE RECEIVED:

FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
DATE RECEIVED:

FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
DATE RECEIVED:

FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
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FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
DATE RECEIVED:

FULL NAME AND ADDRESS OF LENDER:
OCCUPATION:
AMOUNT OF LOAN:
DATE RECEIVED:

DS-DE 73A (Rev. 08/03)

CAMPAIGN FINANCE: EXPENDITURES

Campaign Finance: Expenditures

An expenditure is a purchase, payment, distribution, loan, advance or transfer of funds for the purpose of influencing the results of an election

Campaign Expenditures

A candidate must:

- **Pay all campaign expenditures with a campaign check (except petty cash)**
- **Pay all expenses upon final delivery and acceptance of goods and services**
- **Pay for public utilities when bill is received(utility companies must charge a deposit to meet all anticipated charges during a billing period)**

Campaign Account

Campaign checks must contain:

- **Name of the candidate or committee**
- **Name of bank**
- **Account number**
- **Exact amount of expenditure**
- **Signature of campaign treasurer/deputy treasurer**
- **Exact purpose of expenditure**
- **Name of the payee**

Information may be typed or hand printed on starter checks provided by the bank until printed checks arrive

Name of the campaign account of the candidate or political committee

April 6, 2018

Pay To The Order of

A-1 Sign Company $ 150.00

One Hundred and Fifty and 00/100 Dollars

Hometown Bank

Hometown, FL 01234

FOR Sign Materials *Signature of Campaign Treasurer*

Debit cards

Debit cards may be used for campaign expenditures:

- **<u>Must</u> be from the same bank as the designated primary depository**
- **<u>Must</u> be issued in the name of the treasurer, deputy treasurer or authorized user**
- **<u>Must</u> contain the name of the candidate**
- **No more than <u>three</u> debit cards shall be issued**
- **<u>Cannot</u> receive cash back**

Debit Card Receipts

All debit card receipts <u>must</u> contain:

- **Last four digits of the debit card number**
- **Exact amount of the expenditure**
- **Name of payees**
- **Signature of authorized user (treasurer, etc.)**
- **Exact purpose of expenditure**
- **If not included on the receipt, information may be handwritten**

Credit Cards

Candidates for statewide office, such as governor, cabinet and supreme court justice, may obtain and use credit cards for travel related campaign expenditures

Expenditures

IMPORTANT: No candidate, campaign manager, treasurer or deputy treasurer shall authorize any expenses, unless:

- **There are sufficient funds on deposit in the primary depository account to pay the full amount of the expenditure**
- **Sufficient funds to honor all other checks drawn on the account**
- **All expenses previously authorized but not yet paid**

Reporting Expenditures

Each report must contain:

- **Full name**
- **Address**
- **Amount**
- **Date**
- **Purpose of expenditure**
- **Total amount withdrawn from total spent from petty cash**
- **Total sum of expenditures during the reporting period**

Reimbursing Expenses

Reimbursement for authorized expenses made in connection with the campaign

For example:

Candidate Smith paid for printing of campaign signs with his own money

Reimbursing Expenses

This type of reimbursement will require <u>two entries</u>

Entry #1: ITEMIZED EXPENDITURES

A check to reimburse Mr. Smith for the cost for printing campaign signs would be recorded as a reimbursement

Entering Expenditures

For Reimbursement

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

(1) Name _____ (2) I.D. Number _____

(3) Cover Period ____/____/____ through ____/____/____ (4) Page _____ of _____

(5) Date / (6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
/ /					
/ /					
/ /					
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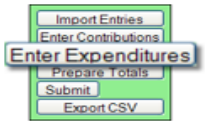
/ /					

DS-DE 14 (Rev. 11/13) SEE REVERSE FOR INSTRUCTIONS AND CODE VALUES

Click



to bring up a list of the expenditures recorded so far:

Campaign Treasurer's Report - Itemized Expenditures

Election : **County 2015 (2015-11-04)**
Report Date : **2015-6**
(2015-06-01 - 2015-06-30)
Add Expenditure Return to Report List

	Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Edit Delete	1	6/4/2015	Swan, Leslie	Campaign Signs	RM		$3,101.00
					Total		$3,101.00

Add Expenditure Return to Report List

Click **Edit** to modify details on an existing expenditure.

Click **Delete** to remove the entry altogether.

Takes you back to the Report List.

Click **Add Expenditures** to bring up the form for entering expenditures.

Date	5 / 22 / 2009	Date of item (mm/dd/yyyy)
Vendor Last Name	Last First Middle	Enter last name or company name if a business
Address 1		
Address 2		
City	ST Zip	
Amount $		
Purpose		Type the purpose of the expenditure.
Expenditure type	Monetary	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

Submit Cancel

Reimbursing Expenses

Entry #2: Distributions

This entry would designate information regarding the entity who was paid for the campaign signs

Entering Distribution

Corresponds to Reimbursement

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS

(1) Name _____ (2) I.D. Number _____

(3) Cover Period ___/___/___ through ___/___/___ (4) Page _____ of _____

(5) Date / (6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amendment	(11) Amount	(12) Distribution Type
/ /						
/ /						
/ /						
/ /						
/ /						
/ /						
/ /						
/ /						

DS-DE 14A (Rev. 11/13) SEE REVERSE FOR INSTRUCTIONS AND CODE VALUES

To record a distribution:

Click

to bring up a page with describing the requirements for a distribution transaction.

Click Proceed with Distribution to see this page:

Campaign Treasurer's Report - Itemized Distributions

Election : **County 2015 (2015-11-04)**
Report Date : **2015-6**
(2015-06-01 - 2015-06-30)
Add Distribution Return to Report List

	Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
					Total		$0.00

Add Distribution Return to Report List

Click **Add Distribution** to bring up the form for entering distributions.

If the entity receiving the distribution is an organization rather than an individual, enter the organization name in the **Last** field.

Enter the date the distribution occurred. This date does not have to be within the current reporting period.

Enter the amount and the purpose of the distribution. If the distribution is a contribution to a candidate, be sure to indicate the office they are running for.

If the distribution is related to a previously reported expenditure, enter:

- The year when the expenditure was reported.
- The *Report Type* from the first page of the report (example, M4).
- The *Sequence Number* (from the first column of the report's expenditures page.

Date 10 / 1 / 2009

Vendor Name Last First Middle

Address 1

Address 2

City St Zip

Amount $

Purpose

Related Expenditures Year Report Line

Submit Cancel

List Vendors

When you've completed the form, click **Submit** to save the information. After the distribution is saved, you'll get another blank distribution form.

Click **Cancel** when you've saved the last distribution you have right now. You'll see the distributions you added highlighted in yellow, as in the example below.

Campaign Treasurer's Report - Itemized Distributions

Election : **County 2015 (2015-11-04)**
Report Date : **2015-6**
(2015-06-01 - 2015-06-30)
Add Distribution Return to Report List

	Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
Edit Delete	1	6/4/2015	Eric Wu Campaign Account 222 South Street Tallahassee, F 32432	Mailouts	2015~2015-6~2		$3,101.00
					Total		$3,101.00

Add Distribution Return to Report List

Note

A distribution transaction does not add to your report totals. The distribution line item only explains the reason for the purchase

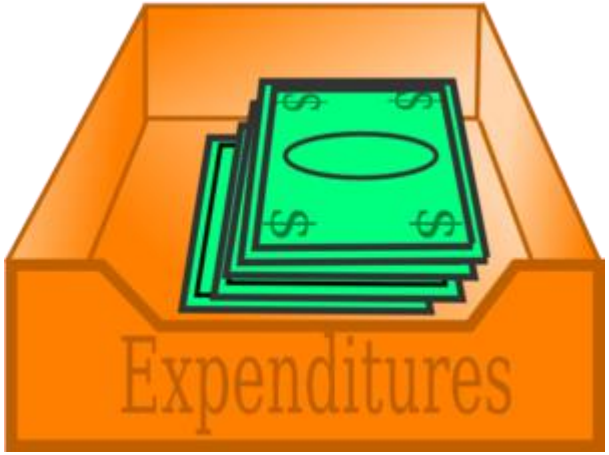
Reimbursement

A candidate or other individual may be reimbursed for expenses by a check drawn on the campaign account

Reimbursement <u>must</u> be reported

Fundraisers

All expenses incurred from a campaign fundraiser are campaign expenditures



Living Expenses

A candidate and/or spouse of a candidate may not use campaign funds to defray normal living expenses

Only expenses incurred during the campaign for transportation, meals, and lodging may be reimbursed

Petty Cash Funds

- Campaign treasurer may provide a petty cash fund
- Campaign treasurer must write a check drawn on the primary campaign account for petty cash
- Petty cash may only be used for office supplies, transportation expenses, and other necessities

Petty Cash Limits

A candidate must:

- **Spend petty cash only in amounts less than $100**
- **Report total amount withdrawn or spent from petty cash per report period**
- **Keep complete records of petty cash**

Reporting Petty Cash Expenditures

- Each expenditure does not have to be reported individually
- Do not mix cash contributions with petty cash
- Do not use petty cash for the purchase of time, space or services from any communications media

Petty Cash Maximums

From the date a candidate appoints his or her campaign treasurer, until the last day of qualifying for the office:

Petty cash maximum is $500 per calendar quarter

<u>After</u> qualifying is over and until the election:

Petty cash maximum is $100 per week for local candidates

Using Campaign Funds After Election

Campaign funds may be used after election night as long as the candidate obligates the funds before election night

Otherwise, the candidate would have to use his or her own funds (for example, to hold a victory party)

Disposing Surplus Funds

Any candidate required to dispose of funds may, before such disposition, be reimbursed by the campaign, in full or in part, for any reported:

- **Contributions to the campaign by the candidate**
- **Loans to the campaign by the candidate**

Expending Surplus Funds

Once a candidate withdraws, becomes unopposed, is eliminated or elected to office, he or she may only expend funds from the campaign account by:

- **Purchasing "thank you" advertising for up to 75 days after candidate withdraws, becomes unopposed, eliminated or elected to office**
- **Paying for items that were obligated before candidate withdrew, became unopposed, was eliminated, or elected to office**

Expending Surplus Funds

Expend surplus funds by:

- **Paying for expenditures necessary to close down the campaign office and prepare final campaign reports**

Surplus Funds and Termination Reports

Within 90 days of withdrawing as a candidate, becoming unopposed, elected or eliminated:

- **A termination report must be filed**
- **Funds must be dispersed**
- **Account must be closed**

Dispersing Funds

Funds may be dispersed of by any of the following means, or a combination of:

- **Return pro rata to each contributor the funds that have not been spent or obligated**
- **Donate the excess funds to a 501(c)(3) charity or organization**
- **Give the funds to the candidate's political party (max $25,000)**

Dispersing Funds

Give the Funds to:

- **Candidate for state office, to the state to be deposited in the General Revenue Fund**

- **Candidate for office of a political subdivision, to such political subdivision, to be deposited in their general fund**

See 106.141F.S.

Dispersing Funds

Transfer some funds to an office account and file quarterly reports until all funds are depleted

Note: A candidate elected to state office may retain up to $20,000 in a campaign account for use in next campaign for the same office

Refund Checks

If a refund check is received after all surplus funds have been disposed of:

- **The check may be endorsed by the candidate and the refund disposed of pursuant to Section 106.141 F.S.**

- **An amended termination report must be filed with the filing officer**

Affidavit of Undue Burden Reimbursement

If a candidate filed an Affidavit of Undue Burden(unable to pay the fee for petition verification), he or she <u>must</u> reimburse any waived petition verification fees to the state or local government

AFFIDAVIT OF UNDUE BURDEN
(Section 99.097(4), Florida Statutes)

IMPORTANT: (1) Paying signature gatherers will preclude or invalidate the filing of an undue burden oath. Section 99.097(6), Florida Statutes, provides: (a) If any person is paid to solicit signatures on a petition, an undue burden oath may not subsequently be filed in lieu of paying the fee to have signatures verified for that petition. (b) If an undue burden oath has been filed and payment is subsequently made to any person to solicit signatures on a petition, the undue burden oath is no longer valid and a fee for all signatures previously submitted to the supervisor of elections and any submitted thereafter shall be paid by the candidate, person, or organization that submitted the undue burden oath. If contributions as defined in s. 106.011 are received, any monetary contributions must first be used to reimburse the supervisor of elections for any signature verification fees that were not paid because of the filing of the undue burden oath. [Note: The second sentence in (b) applies only when payment is made to a signature gatherer after an undue burden oath had been filed.]
(2) Upon a candidate terminating the campaign, any candidate who qualified by the petition process and who has surplus funds, must first apply the surplus funds to the reimbursement of the signature verification fee (if applicable). *See* s. 106.141(7), Florida Statutes.

****

I certify under oath that I intend to qualify as a candidate for the office of _____ and that I am unable to pay the fee for verification of petition signatures for that office without imposing an undue burden on my personal resources or on resources otherwise available to me.

X _____ _____
Signature of Candidate **Print Candidate's Name**

_____ _____
Address **City**

_____ _____ ( )_____
State **Zip** **Telephone Number**

State of Florida
County of _____

Sworn to (or affirmed) and subscribed before me this _____ **day of** _____, **20**___
by _____.

Personally Known: _____ or

Produced Identification: _____

Type of Identification Produced:

_____

_____
Signature of Notary Public – State of Florida
Print, Type or Stamp Commissioned Name of Notary Public

DS-DE 19A (Rev. 6/15)

CANDIDATE FINANCE REPORTING

Filing Campaign Reports

- Start by keeping your bank statements current and balanced
- Keep current with your campaign contributions and expenditures in the campaign reporting module

Do not forget to list on your campaign finance reports any bank charges or other expenses that are automatically deducted from your account

Filing Candidate Reports Online

- Reports must be submitted via SOE website
- When data entry is complete, report is submitted using electronic signature(s)
- Reports will be released on voteindianriver.com when accepted by SOE

Filing Candidate Reports Online

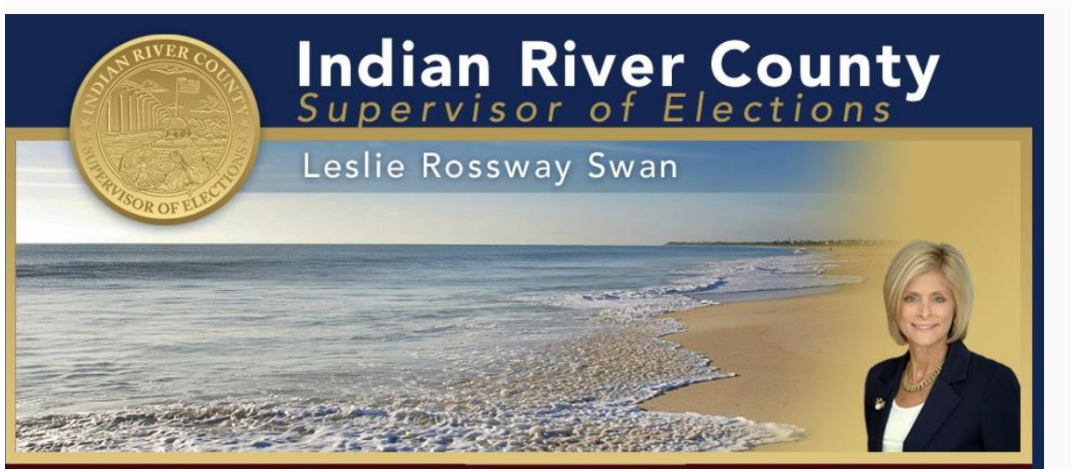
When you file for office, you will be provided with:

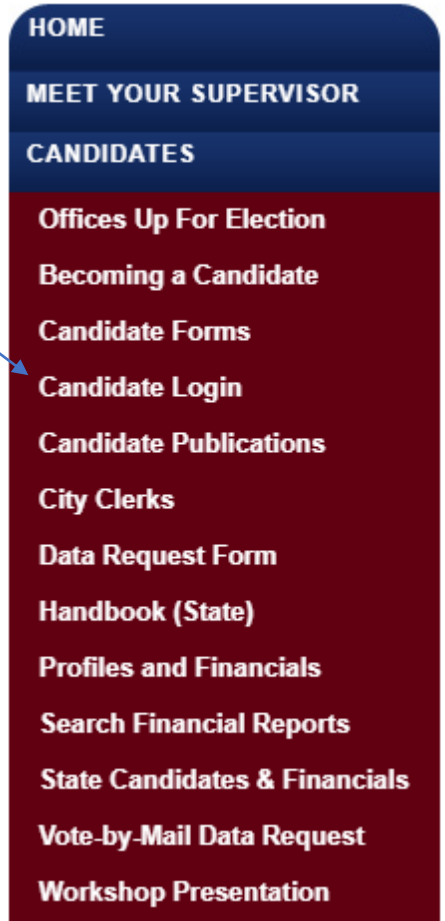
- **Candidate ID number**
- **Candidate password**
- **Candidate PIN (for electronic signature)**
- **Treasurer PIN (for electronic signature)**
- **“How to File Financial Reports” Manual**

Filing Reports

- **Go to SOE website: voteindianriver.com**

- **Click on: Candidate Login**





Candidate/Committee Log In

Don't forget that the report IS NOT LEGALLY FILED until the electronically filed and electronically signed report is received by the elections office. This **must** be done on or before the due date of the report. **If the report is delinquent, you are subject to a fine.**

Once the report is electronically received by the elections office, the elections office will publish the data entered by you on the web site.

Using the system is very easy and there is no cost to you.

Use the Candidate ID, Candidate Password, Candidate/Treasurer signature PIN number provided by the Supervisor of Elections office to log in to the Financial Reporting System.

Numeric ID (no leading zeros) [ ] Password [ ] Login

Entering contributions and expenditures

Export All Transactions CSV

Help

Press Help for information on using the new 'Import Entries' feature.

Candidate Reports				
Election : General Election (2018-11-06)				
Past Reporting Periods Current Reporting Periods Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2017-M12 (12/01/2017 - 12/31/2017) 1/10/2018	-	-	No Data Entered	Import Entries Enter Contributions Enter Transfers Enter Expenditures Enter Distributions Prepare Totals Create Waiver Report

- Choose the reporting period
- Enter contributions, expenditures, distributions, etc.
- NOTE: The RED Help button is a step-by-step tutorial for “How to File Finance Reports Online”

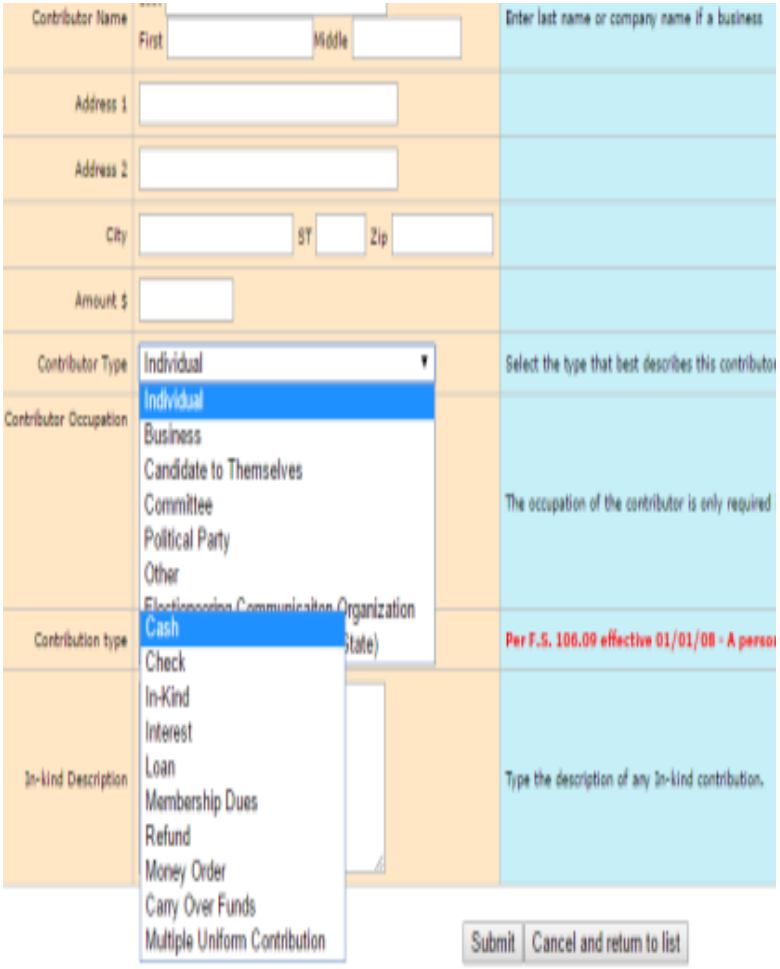
Entering Contributions

Date	12 / 15 / 2017	Date of item (mm/dd/yyyy)
Contributor Name	Last First Middle	Enter last name or company name if a business
Address 1		
Address 2		
City	ST Zip	
Amount $		
Contributor Type	Individual	Select the type that best describes this contributor
Contributor Occupation		The occupation of the contributor is only required **if the amount is over $100**
Contribution type	Cash	**Per F.S. 106.09 effective 01/01/08 - A person may not make or accept a cash contribution in excess of $50.**
In-kind Description		Type the description of any In-kind contribution.

Submitting Entries

Click “submit” after each entry

When finished with all entries for your session, select “cancel and return to list”

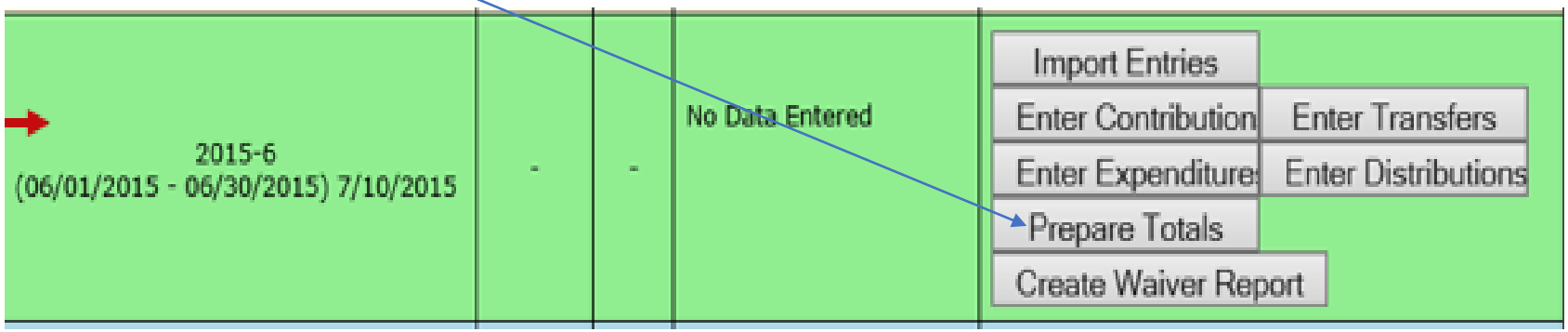


Entering Expenditures

Date	12 / 15 / 2017	Date of item (mm/dd/yyyy)
Vendor Name	Last First Middle	Enter last name or company name if a business
Address 1		
Address 2		
City	ST Zip	
Amount $		
Purpose		Type the purpose of the expenditure.
Expenditure type	Monetary	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

Finalizing the report

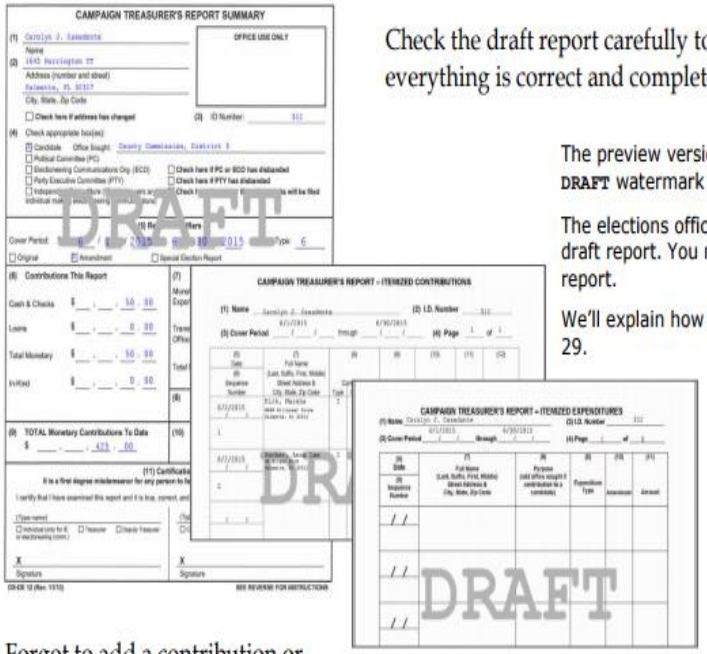
When done entering all information for the reporting period, select "prepare totals"



Previewing the Report

Preview a report -

Draft



Check the draft report carefully to verify everything is correct and complete.

The preview version of the report has a **DRAFT** watermark on each page.

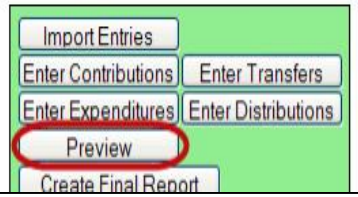
The elections office cannot accept a draft report. You must submit a final report.

We'll explain how to do this on page 29.

Forgot to add a contribution or expenditure?

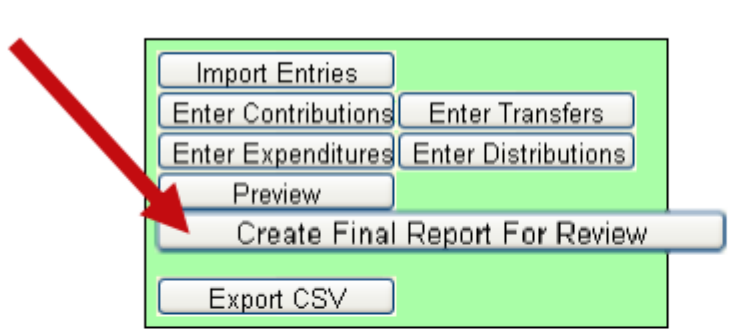
That's OK: You can continue to add them after doing the preview.

On the Report List, notice that the **Prepare Totals** button is now labeled **Preview**.

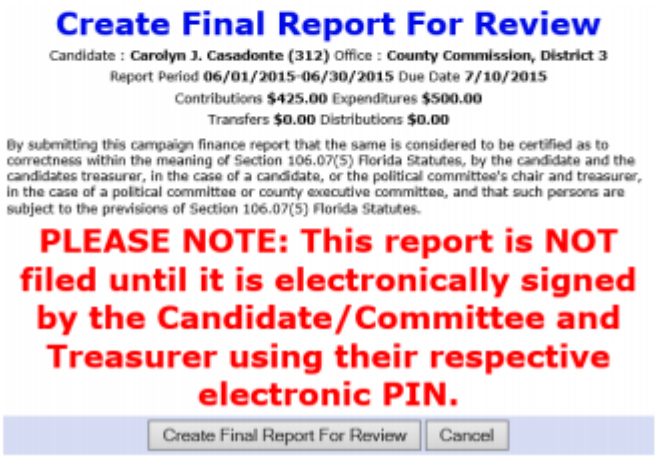


To finalize the report:

Click



to bring up instructions:



Create Final Report For Review

Candidate : **Carolyn J. Casadonte (312)** Office : **County Commission, District 3**

Report Period **06/01/2015-06/30/2015** Due Date **7/10/2015**

Contributions **$425.00** Expenditures **$500.00**

Transfers **$0.00** Distributions **$0.00**

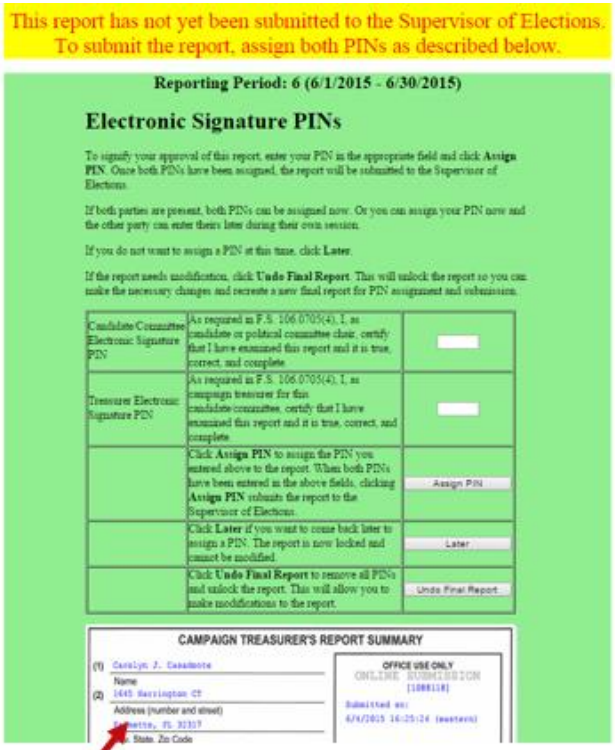
By submitting this campaign finance report that the same is considered to be certified as to correctness within the meaning of Section 106.07(5) Florida Statutes, by the candidate and the candidates treasurer, in the case of a candidate, or the political committee's chair and treasurer, in the case of a political committee or county executive committee, and that such persons are subject to the previsions of Section 106.07(5) Florida Statutes.

PLEASE NOTE: This report is NOT filed until it is electronically signed by the Candidate/Committee and Treasurer using their respective electronic PIN.

Create Final Report For Review | Cancel

Electronic Signature

Use your PIN, which is an electronic signature



This report has not yet been submitted to the Supervisor of Elections.
To submit the report, assign both PINs as described below.

Reporting Period: 6 (6/1/2015 - 6/30/2015)

Electronic Signature PINs

To signify your approval of this report, enter your PIN in the appropriate field and click **Assign PIN**. Once both PINs have been assigned, the report will be submitted to the Supervisor of Elections.

If both parties are present, both PINs can be assigned now. Or you can assign your PIN now and the other party can enter theirs later during their own session.

If you do not want to assign a PIN at this time, click **Later**.

If the report needs modification, click **Undo Final Report**. This will unlock the report so you can make the necessary changes and recreate a new final report for PIN assignment and submission.

Candidate/Committee Electronic Signature PIN	As required in F.S. 106.0705(4), I, as candidate or political committee chair, certify that I have examined this report and it is true, correct, and complete.	
Treasurer Electronic Signature PIN	As required in F.S. 106.0705(4), I, as campaign treasurer for this candidate/committee, certify that I have examined this report and it is true, correct, and complete.	
	Click **Assign PIN** to assign the PIN you entered above to the report. When both PINs have been entered in the above fields, clicking **Assign PIN** submits the report to the Supervisor of Elections.	Assign PIN
	Click **Later** if you want to come back later to assign a PIN. The report is now locked and cannot be modified.	Later
	Click **Undo Final Report** to remove all PINs and unlock the report. This will allow you to make modifications to the report.	Undo Final Report

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Carolyn J. Casadmote
Name

(2) 1445 Harrington Ct
Address (number and street)

Lafayette, FL 32317
City, State, Zip Code

OFFICE USE ONLY
ONLINE SUBMISSION
[1088118]

Submitted on:
6/4/2015 16:25:24 (eastern)

...followed by an online view of the report.

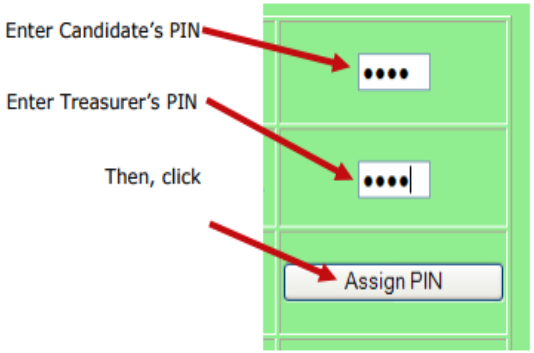
Electronic signature

You must enter:

- **Candidate's PIN**
- **Treasurer's PIN**

Always select "Assign PIN"

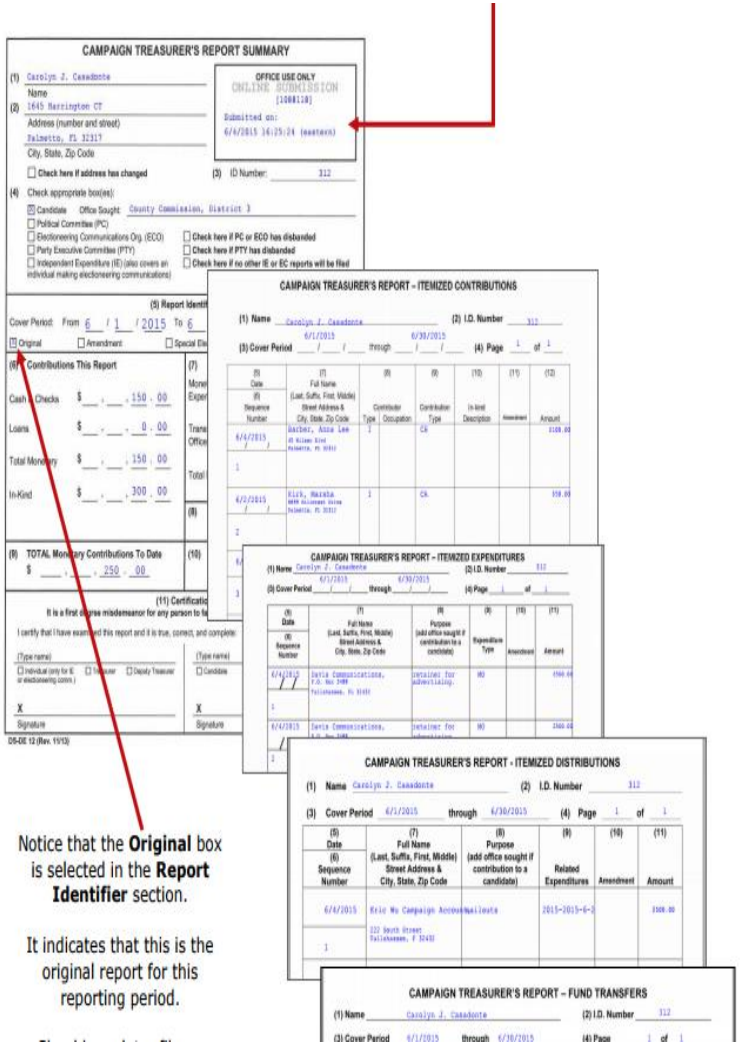
- Enter both PINs in the space provided and click **Assign PIN** to submit the report to the Supervisor of Elections.



Creating a Final Report

Final report appears and "draft" is gone

Notice the submitted date and time

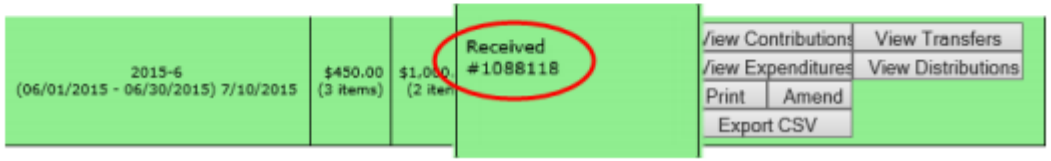


Report Received

Notice that report has been received on the reports page

When will my report appear on the elections website?

That depends on your county's procedures. Most counties reserve the right to review reports before releasing them to the public. Typically, when the report status changes to **Received**, the report is available on the website, but this can vary, so check with your county to find out what you can expect.



Upon SOE approval, report will be released on SOE website

Modifying a report

You can always change a report by filing an amended report for a current or a past reporting period

AMENDED

Campaign Finance Resources

- **Chapter 106, F.S.**
- **Online Handbooks**:
  - -Candidate and Campaign Treasurer Handbook
  - -Electioneering Communications Organization Handbook
  - -Political Committee Handbook

Florida Department of State/Division of Elections

- Administers ch.106, F.S.
- Operates state level electronic filing system
- Maintains campaign documents, candidate, and committee databases
- Oversees registration and dissolution of political entities
- Issues advisory opinions
- Assesses statutory fines
- Conducts Audits

Florida Elections Commission

- Enforces ch.106, F.S.
- Investigates sworn complaints
- Decides appeals of automatic fines and revocations of political entities
- Determines violations of chapters 104 and 106, F.S.
- Imposes fines for violations of chapters 104 and 106, F.S.
- Issues final orders

POLITICAL ADVERTISING

Political Advertising

A political advertisement is a paid expression in a communications media prescribed in Section 106.011(15) F.S., which expressly advocates the election or defeat of a candidate or the approval or rejection of an issue

Political advertisements include radio, TV, newspaper, campaign literature, mail or messages other than the spoken word in direct conversation

Advertising Disclaimers

Advertising disclaimers are required for political ads that are paid for by a candidate and published or circulated

Disclaimers must be verbatim per Section 106.143 F.S.

Reminder: All candidates receive a copy of the Florida Election Code when filing

Political Ads Paid for by Candidate

If published, displayed or circulated before or on election day, political advertisements must state:

- **"Political advertisement paid for and approved by name of candidate, party affiliation, for office sought,"** ***or***

- **"Paid for by name of candidate, party affiliation, for office sought"**

Section 106.143(1)(a)(1), F.S

Disclaimer Exceptions

There are many exceptions to disclaimer requirements in advertising under Section 106.143 (1-10) F.S., such as items designed to be worn by a person, which do not require a disclaimer

Disclaimer Exceptions

Any candidate running for an office with a district, group or seat number does not have to indicate the district, group or seat number in a political advertisement

Refer to 106.143 (1-10) F.S. for all disclaimer requirements

Definitions

Incumbent: Candidate who is currently holding office

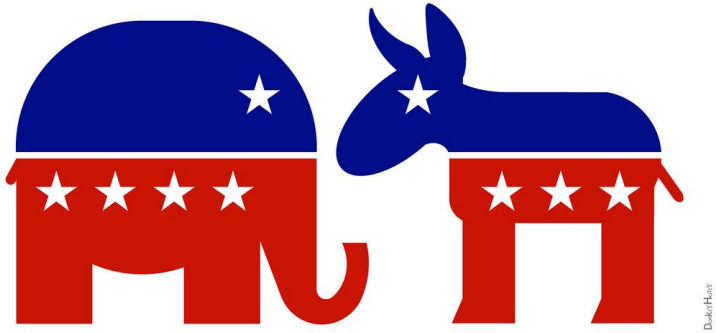
Non Incumbent: Candidate who is running for an office and does not currently hold the position

Partisan candidate: Candidate who can campaign and qualify for office with a political party affiliation

Non Partisan candidate: Candidate who is prohibited from campaigning and qualifying for office with a political party affiliation

Running for a Partisan Office?

Candidate shall state the name of the political party of which candidate is seeking in the advertisement



Section 106.143(3) F.S.

Incumbent Candidates

The word "re-elect" in an advertisement may only be used for an incumbent candidate:

Example: **Re-elect Jane Doe for …**

Section 106.143(6)F.S.

Non-incumbent Candidates

- **Non-incumbent candidates <u>must</u> use the word "<u>for</u>" in advertisements so that incumbency is not implied**

Example: **Elect Jane Doe <u>for</u> …**

Section 106.143(6)F.S.

No-Party Candidates

- **Candidates for a partisan office running with no party affiliation must state that the candidate has no party affiliation**

Example: **Jane Doe, no party affiliation, for…**

Section 106.143(3) F.S

Write-in Candidates

- **Write-in candidates <u>must</u> state "write-in candidate" in advertisements**

  Example: **Jane Doe, write-in candidate for…**

Section 106.143(1) F.S

Fundraisers

Any tickets or advertising for campaign fundraisers must comply with the disclaimer requirements in Section 106.143 F.S.

Political Advertisement Endorsements

An ad placed by an organization in support of a candidate must be approved by the candidate

Since the organization paid for the ad, it is considered an in-kind donation to the candidate, and must:

- **State who supported and paid for the ad**
- **Include "in-kind" in the ad**
- **Be approved by the candidate, who must provide a written statement of authorization**

- **Section 106.143(5) F.S.**

Political Advertisement Endorsements

This does not apply to an editorial endorsement by any:

- **Newspaper**
- **Radio**
- **TV station**
- **Other recognized news medium publication by a party committee**

- **Section 106.143(4)(a) F.S.**

Independent Expenditure

An expenditure made for the purpose of expressly advocating the election or defeat of a candidate and cannot be coordinated with any candidate

Must state:
“Paid political advertisement paid for by name of organization. This advertisement was not approved by any candidate”

Must provide a written statement that no candidate has approved the advertisement to the advertising medium

Section 106.143(5)(b) F.S.

Advertising in Another Language

May provide any disclaimers required in the language used in the advertisement

Section 106.143(9) F.S.

Closed Captioning

Each candidate, political party and political committee <u>must use</u> closed captioning and descriptive narrative, <u>or must</u> file a written statement with the qualifying SOE officer with reason for excluding these items

Section 106.165, F.S.

Telephone Solicitation

- **Caller must identify the persons or organization sponsoring the call by stating “paid for by” or “paid for on behalf of”**

- **No telephone call shall state or imply that the caller represents any organization unless given the approval in writing**

Section 106.147, F.S.

PLEASE LOOK AT YOUR NEXT HANDOUT PAGE

Q & A

Q. A candidate running for a partisan office is placing and paying for an advertisement in a local newspaper to promote his/her campaign. What disclaimer is necessary in the ad?

Q & A

A. "Political advertisement paid for and approved by name of candidate, party affiliation, office sought"

OR

"Paid by name of candidate, party affiliation, office sought"

Campaign Signage

- Each municipality and the county has sign ordinances

- On election day, sign-related complaints (outside the 150' no-solicitation zone) must be directed to the code enforcement unit assigned to the specific voting area

- The SOE is not be responsible for any signs left or posted outside the 150' no-solicitation zone

More about signage

Code enforcement officers can provide information on local permits and/or sign regulations for:

- **Fellsmere**
- **Indian River County**
- **Indian River Shores**
- **Sebastian**
- **Town of Orchid**
- **Vero Beach**

POLL WATCHERS

Poll Watchers

- Candidates and political parties may have one poll watcher in each polling room or early voting site at any one time
- All members of the public may observe opening and closing procedures
- Deadlines for Election Day poll watcher designations must be submitted prior to noon of the second Tuesday preceding the election

Poll Watchers

- **For early voting sites, designations must be submitted prior to noon, at least 14 days before early voting begins**

- **Poll watchers shall be approved by the SOE no later than 7 days before early voting begins or election day**

VOTE-BY-MAIL BALLOTS

Vote-by-Mail Ballots

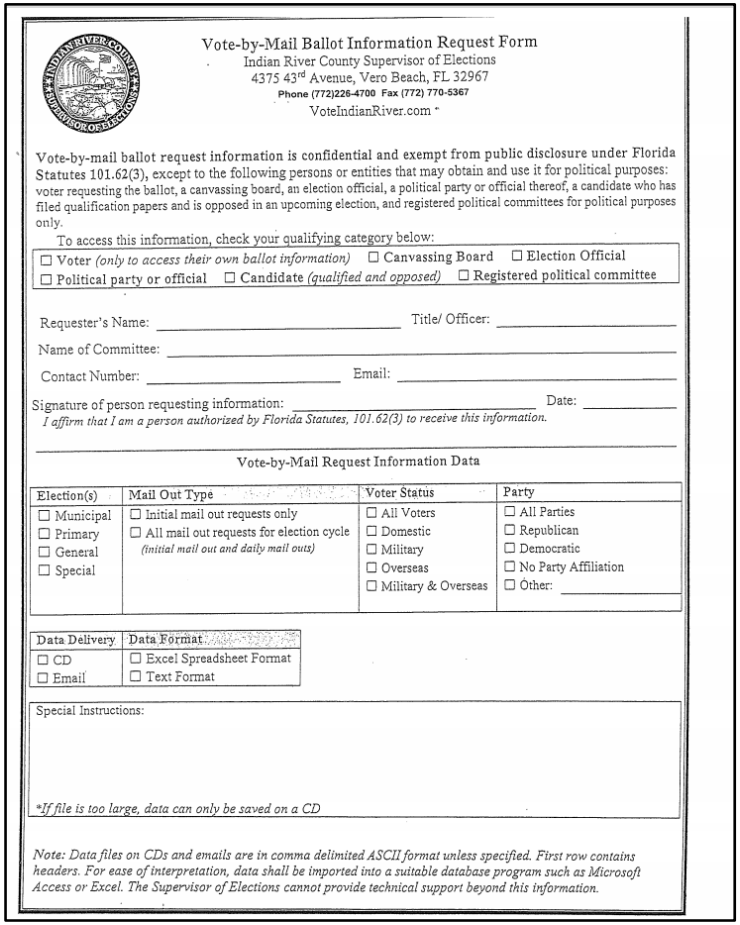
Can I obtain a list of who has requested a vote-by-mail ballot?

Vote-by-mail ballot request information is confidential and exempt from public disclosure, unless you are one of the following:

- **Canvassing board member**
- **Election official**
- **Political party or official thereof**
- **Qualified candidate who is opposed in an upcoming election**
- **Registered political committee**

Section 101.62(3) F.S.

Look at your next handout



Vote-by-Mail Ballot Information Request Form
Indian River County Supervisor of Elections
4375 43rd Avenue, Vero Beach, FL 32967
Phone (772)226-4700 Fax (772) 770-5367
VoteIndianRiver.com

Vote-by-mail ballot request information is confidential and exempt from public disclosure under Florida Statutes 101.62(3), except to the following persons or entities that may obtain and use it for political purposes: voter requesting the ballot, a canvassing board, an election official, a political party or official thereof, a candidate who has filed qualification papers and is opposed in an upcoming election, and registered political committees for political purposes only.

To access this information, check your qualifying category below:

☐ Voter *(only to access their own ballot information)* ☐ Canvassing Board ☐ Election Official
☐ Political party or official ☐ Candidate *(qualified and opposed)* ☐ Registered political committee

Requester's Name: _____ Title/ Officer: _____

Name of Committee: _____

Contact Number: _____ Email: _____

Signature of person requesting information: _____ Date: _____

I affirm that I am a person authorized by Florida Statutes, 101.62(3) to receive this information.

Vote-by-Mail Request Information Data

Election(s)	Mail Out Type	Voter Status	Party
☐ Municipal ☐ Primary ☐ General ☐ Special	☐ Initial mail out requests only ☐ All mail out requests for election cycle *(initial mail out and daily mail outs)*	☐ All Voters ☐ Domestic ☐ Military ☐ Overseas ☐ Military & Overseas	☐ All Parties ☐ Republican ☐ Democratic ☐ No Party Affiliation ☐ Other: _____

Data Delivery	Data Format
☐ CD ☐ Email	☐ Excel Spreadsheet Format ☐ Text Format

Special Instructions:

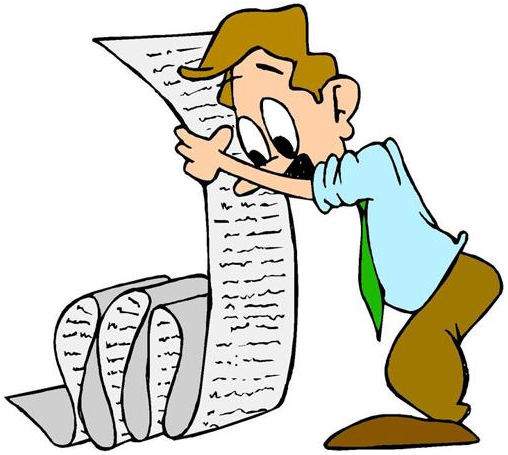
**If file is too large, data can only be saved on a CD*

Note: Data files on CDs and emails are in comma delimited ASCII format unless specified. First row contains headers. For ease of interpretation, data shall be imported into a suitable database program such as Microsoft Access or Excel. The Supervisor of Elections cannot provide technical support beyond this information.

Requesting Registered Voter Information

- **Payment for any requested list must be paid by cash or check**

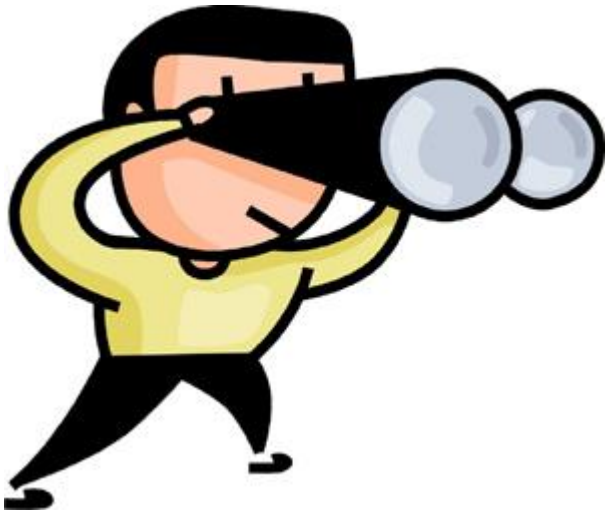
- **We do not accept credit cards or debit cards for payment**

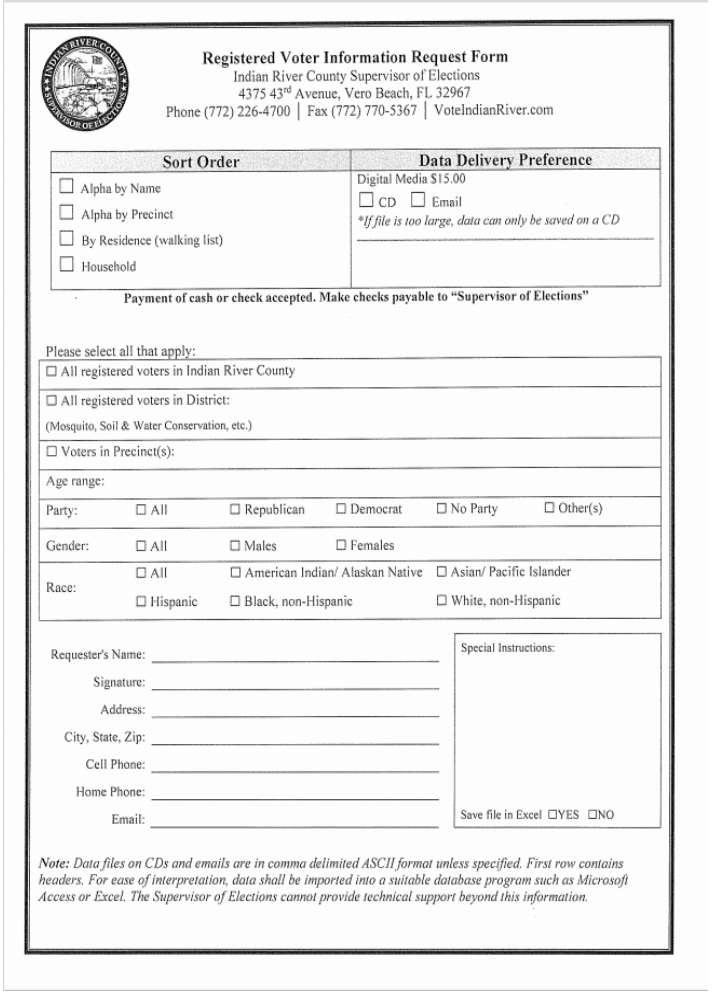


Why would I need this list?

- Walk a neighborhood house-by-house
- Send flyers to registered voters
- Send flyers to households
- Review previous voting history

Look at your next handout





Registered Voter Information Request Form
Indian River County Supervisor of Elections
4375 43rd Avenue, Vero Beach, FL 32967
Phone (772) 226-4700 | Fax (772) 770-5367 | VoteIndianRiver.com

Sort Order	Data Delivery Preference
☐ Alpha by Name ☐ Alpha by Precinct ☐ By Residence (walking list) ☐ Household	Digital Media $15.00 ☐ CD ☐ Email **If file is too large, data can only be saved on a CD*

Payment of cash or check accepted. Make checks payable to "Supervisor of Elections"

Please select all that apply:

☐ All registered voters in Indian River County					
☐ All registered voters in District: (Mosquito, Soil & Water Conservation, etc.)					
☐ Voters in Precinct(s):					
Age range:					
Party:	☐ All	☐ Republican	☐ Democrat	☐ No Party	☐ Other(s)
Gender:	☐ All	☐ Males	☐ Females		
Race:	☐ All ☐ Hispanic	☐ American Indian/ Alaskan Native ☐ Black, non-Hispanic	☐ Asian/ Pacific Islander ☐ White, non-Hispanic		

Requester's Name: _____
Signature: _____
Address: _____
City, State, Zip: _____
Cell Phone: _____
Home Phone: _____
Email: _____

Special Instructions:

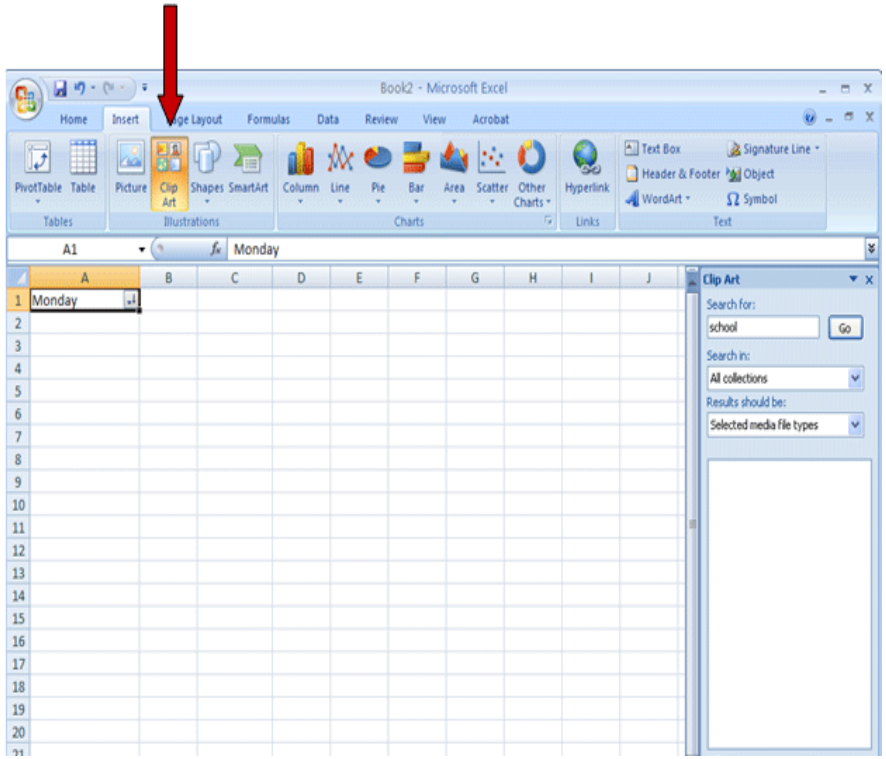
Save file in Excel ☐YES ☐NO

Note: *Data files on CDs and emails are in comma delimited ASCII format unless specified. First row contains headers. For ease of interpretation, data shall be imported into a suitable database program such as Microsoft Access or Excel. The Supervisor of Elections cannot provide technical support beyond this information.*

List Categories

Lists of registered voters from Indian River County are formatted in Excel and can be sorted by:

- **Name**
- **Precinct**
- **Residence**
- **Household**
- **Specific district**
- **Specific age range**
- **Gender**
- **Race**
- **Party**



ETHICAL CONDUCT

Speaking at Public Meetings

- **Candidates <u>may not</u> pay money or give anything of value for speaking at a political meeting to further their candidacy**

- **Candidates <u>may not</u> make any contribution in the name of another, directly or indirectly**

Contribution Solicitation

Candidates may not solicit contributions from or make contributions in exchange for political support to any religious, charitable, political party, civic or other organizations established primarily for the public good

Use of Campaign Funds

A candidate may use campaign funds to purchase tickets, admission to events, or advertisements from the following groups:

- **Religious**
- **Charitable**
- **Political party**
- **Civic**

Memberships

Candidates may continue membership in and, if they have been a member for more than six months, make donations to the following groups:

- **Religious**
- **Charitable**
- **Political party**
- **Civic**

Malicious Statements

A candidate may not, with actual malice, make any false statement about an opposing candidate

This is a felony of the third degree per Section 104.271 F.S.

Judicial Candidate Limitations

Judicial candidates shall not participate in any partisan political party activities except:

- **Register to vote as a member of any political party**
- **Voting in any party primary contest**

Judicial Candidate Limitations

Limitations on political activity:

- **Campaign as a member of any political party**

- **Publicly represent or advertise herself/himself as a political party member**

- **Make political speeches other than in the candidate's own behalf**

Judicial Candidate Limitations

A candidate for judicial office shall not:

- **Make contributions to a political party fund**
- **Solicit or accept contributions for any political party**

Judicial Candidate Limitations

A candidate for judicial office <u>shall not</u>:

- **Accept or retain a place on any political party committee**
- **Make any contributions to (person, group, or organization) for its endorsement to judicial office**
- **Agree to pay all or any part of an advertisement sponsored by any person, group or organization where the candidate may be endorsed for judicial office**

VOTE
ELECTION
NIGHT
LIVE

Election Night Results

Election night voting results are released after the polls are closed:

- **Early voting totals and vote-by-mail ballot totals are released within approximately 30 minutes**
- **Election day results are updated approximately every 45 minutes thereafter**

Candidate Responsibilities

As the candidate, you are responsible for all aspects of your campaign

Polling Place Etiquette

Candidates and campaign volunteers, please take time to look around the polling sites before you leave on election day and pick up any remaining signs, flyers, trash, etc.

Our office is very fortunate to have such nice facilities available for us to rent on election day

Thank You and
Good Luck!