

First Steps for Candidates Running for School Board Trustee

This quick-start guide for candidates is not intended to provide comprehensive information. For more details, including information on political advertising requirements, fundraising rules, and filing schedules, see the Texas Ethics Commission's (TEC) website at www.ethics.state.tx.us.

1. All candidates must file a Campaign Treasurer Appointment (Form CTA)

All candidates must file Form CTA even if you do not intend to raise or spend any money. Form CTA is required to be filed before you file an application for a place on the ballot, raise or spend any money for your campaign, or announce your candidacy. You can find this form and its instructions on this web page: www.ethics.state.tx.us/filinginfo/filing_treasurer_appointment.html. File Form CTA with the school board clerk or school board secretary, as applicable.

2. Opposed Candidates: Will you accept or spend more than \$500 for the election?

- **YES:**
 - You do not qualify to file on the modified reporting schedule. (See "Modified Reporting" in "[Campaign Finance Guide for Candidates and Officeholders Who File with Local Filing Authorities](#)".)
 - You are **required** to file pre-election campaign finance reports using Form C/OH if you have an opponent on the ballot. For Form C/OH and instructions for filling out this form, see www.ethics.state.tx.us/filinginfo/cohfrm.htm.
 - Pre-election reports are due 30 days and 8 days prior to each election. To be timely filed, pre-election reports must be received by the school board clerk or school board secretary no later than the due date.
- **NO:**
 - You can elect to file on the modified reporting schedule by completing the *Modified Reporting Declaration* on page two of Form CTA. File Form CTA with the school board clerk or school board secretary. (See "Modified Reporting" in "[Campaign Finance Guide for Candidates and Officeholders Who File with Local Filing Authorities](#)".)
 - If you elect to file on the modified reporting schedule, you do not have to file pre-election campaign finance reports due 30 days and 8 days prior to the election.
- **Exceed \$500:** If you elect to file on the modified reporting schedule but later exceed \$500 in either contributions or expenditures, what reports you will be required to file depends upon when you exceed \$500.
 - If you exceed \$500 prior to the 30th day before the election, you are **required** to file pre-election campaign finance reports due 30 days and 8 days prior to an election using Form C/OH. To be timely filed, pre-election reports must be received by the school board clerk or school board secretary no later than the due date. For Form C/OH and instructions for filling out this form, see www.ethics.state.tx.us/filinginfo/cohfrm.htm.
 - If you exceed \$500 after the 30th day before the election, you are **required** to file an Exceeded \$500 Limit report using Form C/OH. To be timely filed, this report must be filed with the school board clerk or school board secretary within 48 hours of exceeding \$500. For Form C/OH and instructions for filling out this form, see www.ethics.state.tx.us/filinginfo/cohfrm.htm.
 - If you exceed \$500 prior to the 8th day before the election, you are **required** to file a pre-election campaign finance report due 8 days prior to an election using Form C/OH. To be timely filed, the pre-election report must be received by the school board clerk or school board secretary no later than the due date. For Form C/OH and instructions for filling out this form, see www.ethics.state.tx.us/filinginfo/cohfrm.htm.

3. Unopposed Candidates

If you do not have an opponent whose name will appear on the ballot in the election, you are an unopposed candidate and are not required to file pre-election campaign finance reports prior to that election.

4. All candidates must file semiannual campaign finance reports (Form C/OH)

All candidates are **required** to file semiannual reports using Form C/OH even if you have no campaign activity or were unsuccessful in the election. Semiannual reports are due on January 15th and July 15th and must be filed with the school board clerk or school board secretary. To end your filing obligations, you must cease campaign activity and file a Final report using Form C/OH and attaching Form C/OH-FR (Designation of Final Report). For Form C/OH and instructions for filling out this form, see www.ethics.state.tx.us/filinginfo/cohfrm.htm. For more information, see the Ending Your Campaign FAQ located at www.ethics.state.tx.us/whatsnew/EndingYourCampaign.pdf.

5. All candidates can use the TEC's Filing Application to prepare campaign finance reports (Form C/OH)

You can use the TEC's Filing Application at www.ethics.state.tx.us/File/ to prepare a PDF version of your campaign finance report (Form C/OH). Select "Local Authority" and follow the steps to set up an account and login to the application. Once you have completed your report, print out a copy, get it notarized, and file it with the school board clerk or school board secretary by the appropriate deadline.

6. Need More Information?

TEC has published a campaign finance guide for local candidates and officeholders located at www.ethics.state.tx.us/guides/coh_local_guide.pdf. Also, you can visit our website at www.ethics.state.tx.us to find forms, instructions, common reporting errors (under "Hot Topics"), political advertising and fundraising guides, and other information you may find useful.