

## Filing Requirements

### Filing Dates

#### Pre-Preliminary Reports

Due eight days prior to an election. Typically, pre-preliminary reports are filed by candidates in city elections, and only if their names appear on the preliminary ballot.

#### Pre-Election Reports

Due eight days prior to an election.

#### Post-Election Reports

Due 30 days after an election (for spring elections in towns).

#### Year-end Reports

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

### Campaign Finance Forms

All forms are available at the OCPF website using the search bar.

**M102:** Campaign finance report.

**M101:** Organizational form. A candidate cannot be his or her own treasurer, but can be chairman.

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

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

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

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



## Reporter 7

Local filers can use R7, OCPF's filing system, to create, print and file reports with their local election officials.

To register for R7, click the "Getting Started" button on the front page of OCPF's website. Step 4 for local offices provides a link to register.

### CONTACT OCPF

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The QR code below takes you to OCPF's "getting started" page, which provides information for new candidates and committees.



# Campaign Finance Guide for Municipal Candidates Who File Locally



**Massachusetts Office of  
Campaign and Political  
Finance**

## Public Employees\*

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

**May not** host a fundraiser

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

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

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

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

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

## Government Buildings

NOT PERMITTED

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

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

**Display** posters or fliers advertising a fundraiser

**Solicitations** to public e-mail addresses

## Public Resources

**Anderson v. City of Boston** (1978): Public resources may not be used for political campaign purposes

### Examples of Public Resources

Phones / Copiers / E-mail / Paper  
Vehicles / Labor and employee time

**Exception:** Equal access

## Basic Campaign Finance Rules

- ✓ **\$1,000 annual limit** from an individual to a candidate or candidate's committee.
- ✓ **Receipts or Expenditures** of more than \$50 must be *itemized on campaign finance reports*.
- ✓ **Contributions of \$200** or more require occupation and employer information
- ✓ **When making a reimbursement**, no person may sign a check to himself or herself.
- ✓ **Raffles** are prohibited.
- ✓ **No anonymous** contributions, including "Passing the Hat" for cash contributions.
- ✓ **Cash** contributions are permitted, limited to \$50 per individual per calendar year (name and address are required).
- ✓ **Records** must be kept by committees for six years after the date of a relevant election.
- ✓ **Corporate, LLC, LLP and partnership contributions** are prohibited, both monetary and in-kind, to candidates, PACs and party committees. *Ballot question committees and independent expenditure PACs* may accept business contributions in all forms.
- ✓ **Expenditures** can be made to enhance the political future of a candidate, or to enhance the purpose for which a non-candidate committee was organized.
- ✓ **Expenditures** cannot primarily be for anyone person's personal use.

## Out-of-Pocket Expenditures

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

1. Report a receipt from the candidate to the campaign on Schedule A on the M102 form.
2. Report an expenditure to the vendor on Schedule B on the M102 form.
3. If a loan, report the amount spent on Schedule D on the D102 form (a debt owed from the campaign to the candidate).

## SUMMARY

1. **All new candidates must submit a CPF M101 organizational form.**
2. **Open a bank account. Most banks require an IRS EIN.**
3. **Recordkeeping: Names and addresses for all donors, and keep all paper records, including invoices.**
4. **File campaign finance reports on time using M102 forms.**