Candidate Workshop

Susan Gill
Supervisor Of Elections
www.VoteCitrus.com
Objectives of the Workshop

• Introduce the SOE Candidate Support Team

• The Candidate Process
  • Filing for Office
  • Campaign Treasurer
  • Campaign Depository
  • Qualifying
  • Campaign Finance Reports

• Important Information to Note
  • Political Advertising
  • Voter Reports – Vote by Mail
  • Laws
  • Common Violations in Chapter 106

• Supervisor of Elections’ Resources

• Question & Answer Session
Your Candidate Support Team

Susan Gill – Supervisor of Elections
Elizabeth Atkinson – Candidate Qualifying
Maureen Baird – Data Requests & Vote by Mail Ballots

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Website: www.votecitrus.com
Phone: (352) 341-6740 or (352) 564-7120
Disclaimer:
This workshop is an overview of the rules and laws relating to elections. It is not intended to be a replacement for research on each candidate’s part. All information is subject to change, based on legislation and state-driven directives. Any information in this session which conflicts with the applicable state or municipal law at the time, will be superseded by said law.

Note: Florida Statute 99.061(7)5(c)
The filing officer performs a ministerial function in reviewing Qualifying Papers.
**Filing Documents**

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

**DS-DE 83** Statement of Candidate for Judicial Office

**DS-DE 84** Statement of Candidate
Special District candidates are not required to file a DS-DE 9
Treasurer:

• Shall keep detailed accounts of all contributions and expenditures made by or on behalf of the candidate.
• Must keep accounts current within 2 days after the date of any contribution and/or expenditure.
• Shall deposit all funds received by the end of the 5th business day into the campaign depository.
• Shall preserve all account records for a number of years equal to the term of office to which the candidate seeks election.
• Shall file regular reports of all contributions and expenditures.
• May be fined $1,000 or more or be subjected to criminal penalties for failing to file a campaign report or filing an incomplete/inaccurate report.
Campaign Depository

Depository:

- Is designated at the same time as a treasurer is appointed (via DS-DE 9)
  *Designating a campaign depository is merely naming the financial institution where your campaign funds will be deposited (most banks require an initial deposit to open an account and a contribution cannot be accepted prior to the candidate filing Form DS-DE 9.)

- Must be designated prior to obtaining petition signatures for Candidates seeking to qualify by the petition process.

- Must be separate from any personal or other account and used only for depositing campaign contributions and making expenditures.

- Expenditures must be drawn by a check on this account.
  *Only the treasurer/deputy treasurer can sign a campaign check.
2020 Qualifying

• Qualifying period is a one-week period in which candidates are required, by law, to file additional forms in order to have their name placed on the ballot. Those forms are:
  • Candidate Oath
  • Financial Disclosure Form (Form 1 or Form 6)
  • Qualifying Fee (must be paid with Campaign check) or Alternative Method Petition Certification

• The SOE may accept and hold qualifying papers up to 14 days before qualifying begins; they will be processed after qualifying begins.

<table>
<thead>
<tr>
<th></th>
<th>Judicial Candidates</th>
<th>Non-Judicial Candidates</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOE may accept &amp; hold qualifying papers</td>
<td>Apr 6</td>
<td>May 25</td>
</tr>
<tr>
<td>Qualifying begins</td>
<td>April 20 Noon</td>
<td>Jun 8 Noon</td>
</tr>
<tr>
<td>Qualifying ends</td>
<td>April 24 Noon</td>
<td>Jun 12 Noon</td>
</tr>
</tbody>
</table>
## Qualifying Fee & Petition Information

<table>
<thead>
<tr>
<th>Office</th>
<th>Salary</th>
<th>Filing Fee 3%</th>
<th>Assessmt Fee 1%</th>
<th>Party Assessmt Fee (Dem/Rep) 2%</th>
<th>Total Fees Major Party NPA</th>
<th>Registered Voters- Last Gen Election</th>
<th>Petitions Required 1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerk of the Circuit Court, Property Appraiser, Tax Collector, Superintendent of Schools, Supervisor of Elections</td>
<td>$129,064</td>
<td>$3,871.92</td>
<td>$1,290.64</td>
<td>$2,581.28</td>
<td>$7,743.84</td>
<td>109,388</td>
<td>1,094</td>
</tr>
<tr>
<td>Sheriff</td>
<td>$138,491</td>
<td>$4,154.73</td>
<td>$1,384.91</td>
<td>$2,769.82</td>
<td>$8,309.46</td>
<td>109,388</td>
<td>1,094</td>
</tr>
<tr>
<td>County Commission District 1, 3, &amp; 5</td>
<td>$63,106</td>
<td>$1,893.18</td>
<td>631.06</td>
<td>$1,262.12</td>
<td>$3,786.36</td>
<td>109,388</td>
<td>1,094</td>
</tr>
<tr>
<td>School Board District 2 &amp; 4</td>
<td>$35,378</td>
<td>$1,061.34</td>
<td>$353.78</td>
<td>NA</td>
<td>$1,415.12</td>
<td>109,388</td>
<td>1,094</td>
</tr>
<tr>
<td>Citrus County Community Charitable Found Seat 1</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>$25.00</td>
<td>NA</td>
<td>25</td>
</tr>
<tr>
<td>Mosquito Control Board</td>
<td>$4,800</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>$25.00</td>
<td>NA</td>
<td>25</td>
</tr>
<tr>
<td>Homosassa Special Water District Seats 1, 3, &amp; 5</td>
<td>$4,800</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>$25.00</td>
<td>NA</td>
<td>25</td>
</tr>
</tbody>
</table>
• A candidate may begin collecting petition signatures after the Appointment of Campaign Treasurer Form (DS-DE 9) has been filed with the SOE.  
   *Note: Federal & Special District candidates are not required to file DS-DE 9 first.*
• Petitions are valid only for the qualifying period immediately following filing.
• Petition format **must** adhere to DOE’s Form DS-DE 104 specifications.
• Candidates are required to supply, print or make copies of their own petitions.
• Signatures may be obtained from any registered voter in the area of the office you are seeking, regardless of party affiliation.
• The SOE will determine if the correct number of valid petitions have been collected in order to waive the qualifying fee.
• The cost of verifying petitions is $.10 per petition paid in advance by the candidate.

*If the candidate is unable to pay this, he/she may file the Oath of Undue Burden to have this fee waived.*
<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Candidate</td>
<td>John Doe</td>
</tr>
<tr>
<td>The Office Being Sought</td>
<td></td>
</tr>
<tr>
<td>Party Affiliation</td>
<td>Nonpartisan</td>
</tr>
<tr>
<td>Party</td>
<td></td>
</tr>
<tr>
<td>Date of Birth or Voter Registration Number</td>
<td>05/05/55 OR 123456789</td>
</tr>
<tr>
<td>Address</td>
<td>123 Main St.</td>
</tr>
<tr>
<td>City</td>
<td>Inverness</td>
</tr>
<tr>
<td>County</td>
<td>Citrus</td>
</tr>
<tr>
<td>State</td>
<td>FL</td>
</tr>
<tr>
<td>Zip Code</td>
<td>34450</td>
</tr>
<tr>
<td>Signature of Voter</td>
<td></td>
</tr>
<tr>
<td>Date Signed (MM/DD/YY)</td>
<td></td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>2020</th>
<th>Judicial Candidates</th>
<th>Non-Judicial Candidates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petitions due to SOE</td>
<td>March 23 Noon</td>
<td>May 11 Noon</td>
</tr>
<tr>
<td>SOE may accept &amp; hold qualifying papers</td>
<td>April 6</td>
<td>May 25</td>
</tr>
<tr>
<td>Written resignations due if terms of offices, or any party thereof, run concurrently with each other</td>
<td>April 10</td>
<td>May 29</td>
</tr>
<tr>
<td>Deadline for SOE to certify to the DOE the number of valid signatures for candidates seeking to qualify by the petition method</td>
<td>April 13</td>
<td>June 1</td>
</tr>
<tr>
<td>Qualifying begins</td>
<td>April 20 Noon</td>
<td>June 8 Noon</td>
</tr>
<tr>
<td>Qualifying ends</td>
<td>April 24 Noon</td>
<td>June 12 Noon</td>
</tr>
</tbody>
</table>
Candidate Workshop

Requests for Voter Registration Information

And

Election Night Results
Candidates and Parties campaign to registered voters to ask for their vote.

Available for your convenience is a free CD of the list of registered voters. You may stop by and pick one up or have the file emailed. Please call the SOE office and ask for Maureen “Mo” Baird.

The file includes instructions on the data layout and field information. The file is in a .txt format. If you have Microsoft Excel 10 or higher, this program will hold the entire voter file.

If you have a specific request or you are not sure of what you want please call and speak with Mo directly. She will go over your data request individually with you to ensure you receive the maximum information you need to reach your goal.
Vote-by-Mail Ballots and Candidates

Candidates and Parties target Vote-by-Mail ballots to campaign for votes.

Because...past statistics prove it is likely that a person who requests a Vote-by-Mail ballot will vote and return their ballot.
What is a Vote-by-Mail Ballot?

A Vote-by-Mail ballot is a ballot that is mailed to the voter from the elections office prior to election day.

Any registered voter or immediate family member can request a Vote-by-Mail ballot. **If the ballot is to be sent to an address that is not on file with the SOE, the voter must make the request in writing and sign the request.**

The voter will mark their mail ballot at home and return it to the elections office. To have the ballot count, it must be in the elections office by 7:00 pm election night.

Vote-by-Mail ballots are canvassed and processed prior to and election night up to 7:00 pm.
Who is allowed to receive Vote-by-Mail ballot information?

F.S. 101.62(3) This information shall be confidential and exempt from the provisions of s. 119.07(1) and shall be made available to or reproduced only for the 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 or registered committees of continuous existence, for political purposes only.
How will the candidate receive absentee data?

A candidate will complete an “Affidavit to Obtain Vote by Mail Information”

The affidavit allows you to choose the type of information you want to receive (party, districts).

You will receive a password and log in from the elections office. Your password will not be given to anyone except the candidate.

You will log into our website at www.votecitrus.com each day and extract the file. The file format is .txt file. It is a database format.
• What is in the data file?

• The address in this electronic file is the address to which the voter has requested the ballot be mailed to. It might or might not be the voter’s Citrus County address.

• Mail ballots are mailed out no fewer than 45 days before the election for military and overseas voters and between the 40th and 33rd day for civilian voters. (civilian is the bulk of ballots mailed out)
The first drop of vote by mail ballots is significantly higher than each day thereafter.

The most important aspect of utilizing the vote by mail ballot information is the timeframe we are working within. The elections office has about 4 - 5 weeks to mail out and receive the ballots back for an election.
• A candidate may have the first batch of mail ballot information at any time after qualifying. (the closer to the election the file will contain more voter information)

• The elections office mails out the first batch of mail ballots and each day thereafter until 4 days prior to the election. A daily run of mail ballots will be mailed. An electronic file will be generated after 2pm each day for the candidate and posted on the SOE website for you to log in and extract your file.

• Your goal will be for the voter to receive your mailing piece prior to or (at the latest) the same time as they receive their vote by mail ballot.
What to expect Election Night

• Results will be tabulated shortly after the polls close.
• Printouts of unofficial election results will be available at the elections office and on our website.
• The final Unofficial results will be posted on the Supervisor of Elections website at www.votecitrus.com on election night.
Publications

Citrus County
CANDIDATE GUIDE
2020 Election Cycle

How to File Financial Reports Online

2016 Candidate
& Campaign
Treasurer
Handbook

2020 Candidate
Petition Handbook

The Florida Election Code
Chapters 97 – 106, Florida Statutes
Revised: July 2017
What do I need to create reports online?

• It is **Mandatory** that all candidates filing with the Supervisor of Elections use the Electronic Filing System.

• You will be given a Password, Candidate ID Number, and two (2) Electronic Filing PIN numbers.

• You will need a computer equipped with:
  • An Internet connection.
  • A web browser configured to accept cookies and with pop-up blockers disabled
  • Adobe Acrobat Reader®.
Reporting Schedule

2020 Election Dates

Presidential Preference
Primary
March 17, 2020

Primary Election
August 18, 2020

General Election
November 3, 2020
Here’s an example of a financial report.

First, there’s a summary page.

Then, an itemized list of contributions.

Next, a list of expenditures.
Contribution Limits

• A candidate may not receive more than $1000 per election from any one person or business.

• A candidate’s contributions to his/her own campaign are UNLIMITED.

• Contribution limit for cash or cashier’s check is $50.
Contribution Types

• **Cash or Cashier’s Check**
• **Checks** – Must be made payable to candidate’s campaign account.
• **Debit Cards** – Categorized as a “check” for reporting purposes.
• **Pay Pal** – List the contribution in whole, then list the fee as an expenditure.

Credit cards may be accepted for contributions, if you have the ability to accept them. You may not however, use them for purchases unless you are a statewide candidate.
Political Advertising

A political advertisement is a paid expression in a communication medium prescribed in Section 106.011(4) F.S., which expressly advocates the election or defeat of a candidate.

Disclaimer not required for:

• Candidate petitions
• Items designed to be worn
• Novelty items worth less than $10, and are not in opposition to a candidate.
• Link or graphic that directs the user to a site that does require a disclaimer.
• A message placed on a social networking website
• A text message that is less than 200 characters via a short message service.

More details are in Sec. 106.143 F.S.
Political Advertising

Disclaimers must be verbatim per Sec. 106.143, F.S.

Examples – Non-incumbent partisan candidate running for partisan office:

Elect Jane Doe for County Commission District 5
Paid by Jane Doe, Rep., for County Commission

OR

Elect Jane Doe for County Commission District 5
Political Advertisement paid for and approved by Jane Doe, Rep., for County Commission

Examples – Incumbent partisan candidate running for partisan office:

Re-elect Jane Doe County Commission District 5
Paid by Jane Doe, Rep., for County Commission

OR

Elect Jane Doe County Commission District 5
Political Advertisement paid for and approved by Jane Doe, Rep., for County Commission

Examples – Non-incumbent NPA candidate running for partisan office:

Jane Doe for County Commission District 5
Paid by Jane Doe, NPA, for County Commission

OR

Elect Jane Doe County Commission District 5
Political Advertisement paid for and approved by Jane Doe, NPA, for County Commission
Political Advertising

Disclaimers must be verbatim per Sec. 106.143, F.S.

Examples – Non-incumbent candidate running for nonpartisan office:

Elect Jason Educator for School Board District 2
Paid by Jason Educator, for School Board

OR

Elect Jason Educator for School Board
Political Advertisement paid for and approved by Jason Educator, for School Board

Examples – Incumbent candidate running for nonpartisan office:

Re-elect Ima Teacher School Board District 2
Paid by Ima Teacher for School Board

OR

Elect Ima Teacher School Board
Political Advertisement paid for and approved by Ima Teacher for School Board

• District, group, or seat number is not required in ad or disclaimer.
• Elect or Re-elect is not required.
• Bumper stickers do not require the word “for” in body of ad.
• Tickets or advertising for fund raiser require disclaimer.
Political Advertising

Non-incumbent Advertisements

Required:
• The word "for" must be used in the body of such advertisement between the name of the candidate and the office sought. This does not apply to bumper stickers or items designed to be worn by a person.

Prohibited:
• The word "re-elect" may not be used if the candidate is not the incumbent for the office sought.

F.S. 106.143(6)
Helpful Hint......

Use a more accurate picture of how to vote a ballot when creating mailers. Using a $\checkmark$ is not the correct way to mark a ballot and may not be a valid vote! Ensure votes count by filling in the oval!
## Political Advertising

### Examples of Non-incumbent Advertisements with Disclaimers

#### Non-incumbent Advertisements

<table>
<thead>
<tr>
<th>Elect John Doe</th>
<th>Elect John Doe</th>
</tr>
</thead>
<tbody>
<tr>
<td>For County Commission</td>
<td>For County Commission</td>
</tr>
<tr>
<td>District 5</td>
<td>District 5</td>
</tr>
</tbody>
</table>

- Political Advertisement paid for and approved by John Doe, Green Party of Florida, for County Commission
- Paid by John Doe, Green Party of Florida, for County Commission

**Note:** A candidate running for an office that has a district, group, or seat number does **not** have to indicate the district, group, or seat number in the political advertisement or disclaimer.
Fund Raisers

- A campaign fund raiser is any affair held to raise funds to be used in a campaign for public office. Campaign fund raisers may not be held until the person becomes a candidate. (*Sections 106.011(11) and 106.025, F.S.*)

- Any tickets or advertising for such a campaign fund raiser must comply with the requirements of section 106.143, F.S. (Advertising disclaimer)
Contributions from Fund Raisers

• All monies and contributions received with respect to a campaign fund raiser are campaign contributions. All contributions are subject to the contribution limits contained in Section 106.08, F.S., and are to be accounted for and reported as any other contribution. (Section 106.025, F.S.)

• Name and address will be needed for reporting each contributor.

• $50 limit on cash contributions – example ticket sales

• Any tickets or advertising for a campaign fund raiser must comply with the advertising disclaimer requirement in 106.143.
Expenditures for Fund Raisers

• All expenditures with respect to a campaign fund raiser which are made or reimbursed by a check drawn on the campaign account of the candidate are campaign expenditures. All expenditures must be accounted for and are subject to the same restrictions as other campaign expenditures. *(Section 106.025, F.S.)*
• Disposition of Funds – A candidate who withdraws his candidacy, becomes unopposed, is eliminated or elected to office may only expend funds within 90 days from the campaign account in accordance with 106.141, F.S.

• These funds may only be expended from the campaign account to:
Disposition of Funds

• Purchase “thank you” advertising for up to 75 days after he or she withdraws, becomes unopposed or is eliminated or elected.
• Pay for items which were obligated before he or she withdrew, became unopposed or was eliminated or elected.
• Pay expenditures necessary to close down the campaign office and to prepare final campaign reports.
• Dispose of surplus funds as provided in section 106.141, F.S. F.S. 106.11 (5)(a)(b)(c)(d)
Disposition of Funds

Prior to disposing of surplus funds –

• A candidate who makes a loan to his or her campaign and reports the loan by s106.07 may be reimbursed for the loan at any time the campaign account has sufficient funds to repay the loan and satisfy its other obligations.  F.S. 106.11(6)
Disposition of Funds

- Return pro rata to each contributor the funds which have not been spent or obligated.
- Donate the funds to charitable organizations, which meet the qualifications of 501(c)(3) of the Internal Revenue Code.
- Give not more than $25,000 of the funds that have not been spent or obligated to the political party of which such candidate is a member.
- In the case of a candidate for office of a political subdivision, to such political subdivision to be deposited in the general fund.
Laws to Be Familiar With...

Resign-to-Run *(Section 99.012(3), F.S.)*
Federal Hatch Act *(5 USC § 1501 – 1508)*
Changing Parties for Partisan Offices *(Section 99.021, F.S.)*
Changing the Designation of Office *(Section 106.021(1), F.S.)*
Statement of Solicitation *(Section 106.0701, F.S.)*
Certain Prohibited Acts *(Section 106.15, F.S.)*
Making Contributions in the Name of Another *(Section 106.08(5), F.S.)*
Solicitation from Religious/Charitable/Civic Organizations *(Section 106.08(5), F.S., and Division of Elections Opinion 04-03)*
Making Malicious Statements *(Section 104.271, F.S.)*
Certifying a False Report *(Sections 106.07(5) and 106.19, F.S.)*
Limitations on Political Activity for Judicial Candidates *(Section 105.071, F.S., and Division of Elections Opinion 78-34)*
Common Violations in Chapter 106

• A candidate accepting contributions or making expenditures prior to appointing a campaign treasurer and designating a campaign depository.

• Failure of the treasurer of a candidate to file regular reports of all contributions received, and all expenditures made, by or on behalf of the candidate or political committee.

• Failure of a candidate with opposition in an election or his campaign treasurer to return any contribution received on the day of the election or less than 5 days prior to the day of the election.

• Failure of a person to mark all political advertisements as a "pd. pol. adv." or a "paid political advertisement" and to identify the sponsor.

Source: Florida Elections Commission
http://www.fec.state.fl.us/juris/index.html#106
Supervisor of Elections’ Resources

Office
• Data: Voter Lists
• Computer Access for Financial Reporting

Website
• Candidate Financial Reporting System (Electronic Filing System - Campaign Reports)
• File Access to: Daily Vote by Mail Ballot Status
• Election Day hour-by-hour voter turnout
• Misc. Information: Important Dates/Reporting Dates/Links/FAQs
Candidate Sign Ordinances

- **Florida Statute** 106.1435
- **Citrus County Code**  
  Chapter 9 - 9210
- **City of Inverness**  
- **City of Crystal River**

For questions regarding Citrus County ordinances please contact  
Citrus County Code Enforcement  
524-5350
Citrus County – All political signs shall be removed within seven days following the date of the General Election. Unsuccessful candidates shall be removed within seven days of the Primary.

City of Inverness – All political signs shall be removed within seven days after a candidate ceases to be a candidate for office.

City of Crystal River – Political signs shall be removed within seven days following the election.
Remember...
The Candidate and Campaign Treasurer Handbook is your best friend!
Questions & Answers

• If I want to run as a no party affiliation candidate, can I still be registered to vote as a Republican or Democrat?

Yes. Any registered elector who qualifies for office without party affiliation will have their name placed on the ballot at the general election without party affiliation. (Section 99.0955(1), F.S.)
Questions & Answers

• What if I want to change my campaign treasurer or other officers?

File a reappointment of campaign treasurer (Form DS-DE 9) with the filing officer along with a copy of the letter of resignation or removal.
• When can I start collecting signatures to qualify as a petition candidate?

Before collecting any signatures, all candidates must file the Appointment of Campaign Treasurer and Designation of Campaign Depository (Form DS-DE 9) with the filing officer. Each petition must be submitted before noon, May 11, 2020.
Questions & Answers

- Do I have to itemize small contributions of $5, $10, $50 etc.?

Yes. The law provides no exceptions for the reporting of contribution information, regardless of the size of the contribution. The full name and address of the contributor are also required. (Section 106.07(4)(a) F.S.)
• If my treasurer is out of town, can I have an extension to file my report?

No, the election laws do not provide for an extension under these circumstances. (Section 106.04(4)(b)1; 106.07(2)(b) and (3), F.S.)
• Can a corporation give to a candidate?

Yes. A corporation is under the definition of a “person” in Chapter 106, F.S. (Section 106.011(14), F.S.)
• I was given cash at a rally and have no information on who it is from. What do I do?

Report this contribution on your campaign report but do not spend these funds on the campaign. After the campaign is over, dispose of the funds pursuant to Section 106.141, F.S.
• I have more candidate questions not covered in this presentation, who can help me?

Call our office at any time!

341-6740 or 564-7120