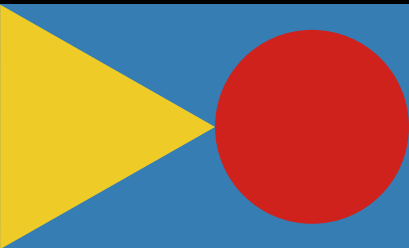


Candidate Packets

Frances Aguilar, TRMC, MMC
City Secretary, Pearland

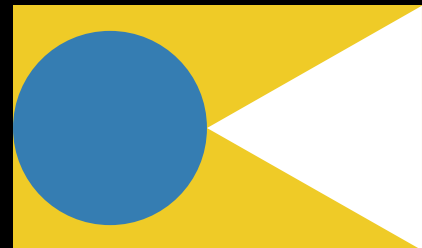
Noemi Garcia
Elections Administrator, GCCISD

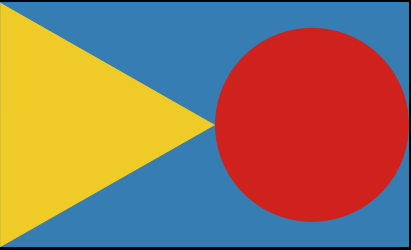
Leticia Brysch
Assistant City Manager, Friendswood



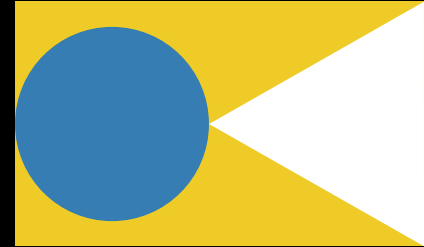
WHOA!

There are lots of attorneys at this conference, but we are not attorneys. Please do not construe anything in this presentation to be legal advice. It's not.





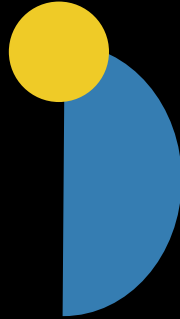
What's the Lingo?




- EC – Texas Election Code
- SoS – Help! Secretary of State
- TML – Texas Municipal League
- TMCA – Texas Municipal Clerks Association
- TEC – Texas Ethics Commission **or** Texas Education Code



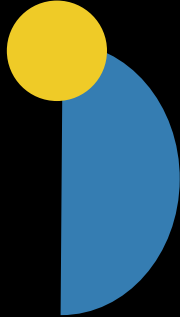
01. What's a candidate packet?




It's a way to provide accurate information & forms to persons interested in running as a candidate (but can be a great teaching tool for anyone!).

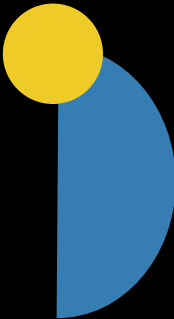


02. What's the statutory reference for candidate packets?



There's not one. Candidate packets are not a requirement unless your entity itself requires them. There are no requirements for what to include.





02. What's the statutory reference for candidate packets?

However, the Tx. Elec. Code 1.010 says authorities will furnish printed forms as needed, without charge. That's the only part the entity must do and the only time there is a requirement for printing.

What are your Responsibilities?

You are responsible for:

- Providing candidates with paper copies of the necessary forms at no charge as required under EC§1.010, Title 15, & Charter, if applicable.
- Accepting documents from Candidates, Officeholders & Political Action Committees (PAC) as required under the EC, Title 15 & Charter, if applicable.
- Maintaining accurate records by date/time stamping filed forms.
- Filing, maintaining, redacting & posting filed forms in compliance with EC & Title 15.

You are not responsible for:

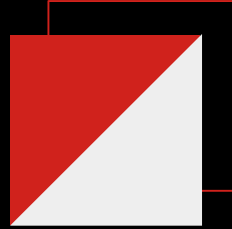
- Ensuring that the forms are filed at all or filed timely. Reminders are not required & are optional.
- Explaining the forms, helping complete the forms, or complete the forms on their behalf.
- Receiving complaints about filings; however, it is always good to check with your legal counsel should one be received.

So, why create a candidate packet?



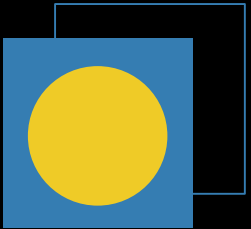
Communicate

Competence. Here, in writing, is a record of the information that has been provided to the recipient. Ensure accuracy & understanding of packet info.



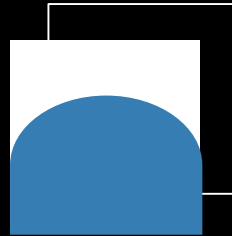
Communicate

Trust. A packet is an opportunity to set expectations & show transparency. It's a continuing educational opportunity with the public & candidates.



Communicate

Service. This may be a citizen's first interaction with your organization. Some candidates may be shy, or not know what to ask. Your packet gives everyone access to the same info. All are treated the same.



Communicate

Lasting Impressions. Your packet will be viewed by the public, elected officials & perhaps a future boss. Showcase your professional writing & organization skills. It's your calling card.

So, How to get started?

Plan to start early!!!

- Give yourself enough time to research, compile & double check your packet in order to have the finalized packet ready at least one month prior to the filing period.
- ALWAYS have another set of eyes look over your packet because you will miss something.



Identify Election Tasks & Deadlines



Election Calendars

Compile important election dates from Secretary of State. (Always up early)

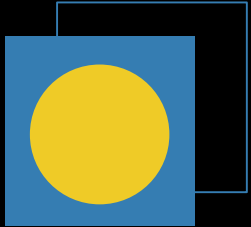
TMCCCP Election Law Calendar for Municipalities

Texas Association of School Boards

Texas Ethics Commission Filing Schedule

County specific election calendars & deadline. (Joint Elections or Contracting Services)

Entity specific election deadlines (Charter)



Useful Tools & Resources:

Free online calendar calculator – helps you to count forward and back from Election Day

Free online access to Texas Constitution & Statutes – Election Code, Education Code, etc.

Free SoS election resources & legal library - legislative updates, advisories, training, etc.

IDENTIFY DEADLINES & INPUT INTO CALENDARS

Outlook, AI Calendars (Motion AI), Old School Paper Calendars
(large, small, desk, personal planners, white boards)

DECIDE: One Big, One Small or Two Smalls?

One **BIG** packet contains everything a candidate need throughout the entire election process. ([Friendswood](#), [Pearland](#), [GCCISD](#))

One **SMALL** packet contains only the basic forms, filing deadlines & requirements for a candidate. ([La Porte](#))

Two **SMALL** packets provide a more focused approach: (1) Applicant Packet: application, qualifications, Campaign Treasurer Appointment (CTA) &
(2) Candidate Packet: campaign filing forms, calendars, all other election details.



What should be included?



Items
necessary
to file for
office

A blue triangle containing the text "Jurisdiction - specific" in white, bold, sans-serif font.

**Jurisdiction
- specific**

Documents that
provide more
information on local
requirements and/or
restrictions



Campaign
finance-
related
materials

FILING BASICS

Campaign Treasurer Appointment

- <https://www.ethics.state.tx.us/forms/coh/cohfrm.php>
- TEC vs. local filers; local elections are local filers
- filing fees are campaign expenses, so candidates must file the CTA first
- candidates for certain races/population levels are also required to file tax returns and other personal financial information

Ballot Application

- <https://www.SoS.texas.gov/elections/forms/pol> - [sub/index.shtml](#)
- entity type; general vs. special election; ballot vs. write - in candidacy

Filing Fee or Filing Petition (if any)

- Tx. Elec. Code—state/county 142; other entities Ch. 144
- home-rule cities w/filing fees must offer petition options, generally, 143.005

Jurisdiction - specific materials

Additional candidate qualifications

- Basic qualifications are in state statute, but your entity may have others, particularly found in bylaws, a city charter or Board Policy (BBA) for School Districts and Colleges.

Entity requirements or restrictions

- sign placements – entities have right to reasonable limits
- Other – ex. Baytown's former filing for the Mayor's designee & Friendswood's additional requirements – *Recollections may differ!*
- language requirements for election materials (Spanish, Vietnamese, etc.)

Educate early and set everyone up for success!

Texas Ethics Commission

Ethics.state.tx.us

- filing schedule, forms, and instructions for candidates, officeholders, political committees, political parties, and lobbyists

Note: pursuant to EC 254.0401, if your governing body has a website, you must post candidate financial reports no later than the 10th business day after the date the report is received.

- guides for political fundraising and political advertising
- campaign reference guides (<https://www.ethics.state.tx.us/resources/guides/>)
- TEC advisory opinions on use of contributions (https://www.ethics.state.tx.us/resources/cf/Personal_Use_Of_Contributions.php)


Other



- Welcome letter from you!
 - Election calendars with important dates
 - Maps – wards/districts
 - Code of Fair Campaign Practices (in TEC forms - cannot require it)
 - Links to budget, ACFR, Popular ACFR, other key financial docs
 - Resources and links, especially to your entity's primary documents – bylaws, charter, rules of procedure, ethics policy and Board Policy for School Districts and Colleges.
-

Other



- Information on duties of the position, best practices
 - Forms to complete if your entity puts up a webpage with candidate information, bio, photo, etc.
 - Election education material on photo ID, serving as an election worker, student election worker, being a deputy voter registrar, etc.
 - What would you want to receive if you were a candidate?
- 
-

Paper, electronic, or BOTH?

Do you want an electronic copy?

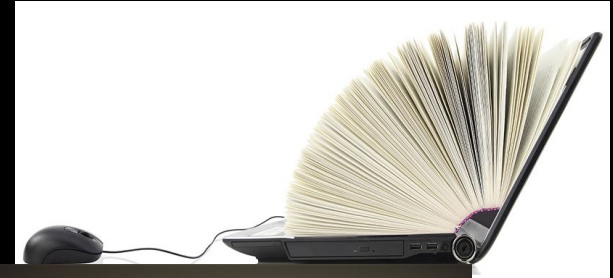
-Thumb drives and/or online facilitates a large amount of reading materials & allows for fillable PDF forms. Online packets, allow for the candidate to review, save, & print items as desired. Consider large PDF packet and/or Webpage with materials listed to allow for quick selection of items.

Do you want paper copy of packet?

-Hard copies of required forms are required, if requested. Have printed forms on hand for quick retrieval or provide a printed binder of the entire packet. Recommend a table of contents for large information packets.

Do you want both?

-Attached thumb drive with the packet to a printed memo & important forms for distribution to walk-in customers. Also, post packet online.



Samples



Goose Creek CISD - <https://www.gccisd.net/page/2025Election>

Friendswood - <https://www.ci.friendswood.tx.us/702/2025-Candidate-Packet>

Irving - <https://www.cityofirving.org/DocumentCenter/View/60332/Electronic-Packet>

Clint ISD - <https://www.clintweb.net/Page/8075>

La Porte - <https://www.laportetx.gov/160/Candidate-Information>



Questions?





thanks!

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