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The Candidate Starter Kit

Every campaign has a beginning.

Checklists and worksheets for people thinking about running for local office: county council, school board, city council, mayor, sheriff and county offices.

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How to use this kit

Keep it in a binder. Fill it in pencil. Update it as you learn.

1. Start with your election office.

Call or visit your county election office and ask for the candidate packet. Use page 3 to write down the answers. Every other page depends on them.

2. Work the checklist in order, roughly.

The checklist on pages 4 and 5 follows the order most local campaigns meet each task. They overlap, so it's fine to work on two phases at once.

3. Put real numbers in the budget.

Get quotes instead of guessing. Add a cushion for surprises. The online budget builder at BeginYourCampaign.com/tools does the math for you.

4. Put every date on one calendar.

Filing, reports, primaries, runoffs and Election Day all go on page 7, then into your phone.

5. Write down who's helping.

A treasurer, a volunteer lead and a few reliable friends are the backbone of a local race. Keep their numbers on page 8.

The free guides at BeginYourCampaign.com explain each step: understanding the office, eligibility and filing, budgets and recordkeeping, your public presence, election calendars and compliance, and connecting with your community.

Questions to ask your election office

Write the answers down. Ask for anything important in writing.

1. What office and district would I file for, and what are the exact district boundaries?

2. What are the age, residency, registration and other eligibility requirements?

3. When does the filing period open and close? What time of day is the deadline?

4. Where do I file, and what forms and ID must I bring?

5. Is there a filing fee, a petition requirement, or a choice of either? How much, or how many signatures?

6. Is this race partisan or nonpartisan? Is there a primary or a runoff?

7. Do I need to form a campaign committee and name a treasurer? Where do I register it?

8. Which campaign finance reports will I file, with whom, and when are they due?

9. Are there contribution limits or rules about who can give?

10. What ethics or financial disclosure forms do I have to file, and when?

11. What disclaimer has to appear on signs, mail and my website?

12. Are there rules about where and when I can place yard signs?

Campaign operations checklist

Check items off as you go. The online version saves your progress.

Decide

- ☐ Read up on the office and attend at least one public meeting
- ☐ Talk it over with family and your employer
- ☐ Check the Hatch Act or employer rules if you work in government
- ☐ Write two sentences on why you're running
- ☐ Take the readiness self-check

Qualify and file

- ☐ Confirm age, residency and registration requirements
- ☐ Get the candidate packet from your election office
- ☐ Find out the filing fee or petition requirement
- ☐ Form your committee and name a treasurer
- ☐ Get an EIN if your bank or state requires it
- ☐ Open a separate campaign bank account
- ☐ Complete ethics or financial disclosure forms
- ☐ File your candidacy before the deadline

Money and records

- ☐ Build a line-item budget
- ☐ Set up a recordkeeping system on day one
- ☐ Learn your contribution limits and reporting rules
- ☐ Make a list of your first 50 potential donors
- ☐ Set up an online donation page

Public presence

- ☐ Register your campaign domain
- ☐ Get good photos taken
- ☐ Launch your website with bio, issues, events and donate
- ☐ Add the paid-for-by disclaimer to everything
- ☐ Set up a campaign social media page and email list

Campaign operations checklist (continued)

Calendar and compliance

- ☐ Put every election and report date on one calendar
- ☐ Set reminders a week before each report is due
- ☐ Work through the first 30 days after filing

Community

- ☐ Recruit a treasurer, volunteer lead and helpers
- ☐ Get your voter list
- ☐ Plan your door-knocking routes
- ☐ Order yard signs and palm cards
- ☐ Hold a kickoff event
- ☐ Collect endorsements from people voters trust
- ☐ Make an Election Day plan for volunteers and poll greeters

After Election Day

- ☐ Thank voters and volunteers
- ☐ File your final reports
- ☐ Pick up yard signs
- ☐ Close or keep your committee under your state's rules

Budget worksheet

Use real quotes. Add a cushion of 10 to 15 percent for surprises.

Line item	Quote or notes	Amount
Filing fee or petition costs	Filing	\$ _____
Copies, notary, postage	Filing	\$ _____
Bank account fees	Filing	\$ _____
Domain name	Online	\$ _____
Website setup	Online	\$ _____
Website hosting and updates	Online	\$ _____
Email list service	Online	\$ _____
Online ads	Online	\$ _____
Yard signs and stakes	Print	\$ _____
Palm cards and door hangers	Print	\$ _____
Mailers and postage	Print	\$ _____
Banners	Print	\$ _____
Kickoff and events	Events	\$ _____
Booth and festival fees	Events	\$ _____
Supplies	Operations	\$ _____
Phone or texting	Operations	\$ _____
Photography	Operations	\$ _____
Donation processing fees	Fundraising	\$ _____
Other		\$ _____
Other		\$ _____
Subtotal		_____
Cushion (____ %)		_____
Total to raise		_____
Months until Election Day		_____
Raise each month (total / months)		_____

Election calendar worksheet

Get these dates from your county or state election office.

Filing period opens

Filing deadline (date and time)

Petition signatures due (if any)

Committee registration due

Ethics or disclosure form due

First campaign finance report due

Second report due

Pre-election report due

Voter registration deadline

Absentee or early voting begins

Primary election

Runoff (if any)

General election

Post-election report due

Final report or committee close-out

Tip: set a phone reminder one week before every report and filing date. Late reports can bring fines in many states.

Team and contacts

Write down who's helping and how to reach them.

Treasurer

Name

Phone or email

Volunteer lead

Name

Phone or email

Door-knocking partner

Name

Phone or email

Sign and literature coordinator

Name

Phone or email

Website and social media

Name

Phone or email

Photographer

Name

Phone or email

County election office

Name

Phone or email

State ethics or campaign finance office

Name

Phone or email

Printer or sign vendor

Name

Phone or email

Bank contact

Name

Phone or email

Notes

Meeting dates, ideas, names to follow up with.