



OKLAHOMA ETHICS COMMISSION

REGISTERING FOR AN INDEPENDENT SCHOOL BOARD & TECHNOLOGY CENTER DISTRICTS CAMPAIGN COMMITTEE

Read through the checklist before completing any items and use it with the Guide for Candidates (School District)

ITEM	DESCRIPTION
<input type="checkbox"/>	<p>Read the Guide for Candidates (School District)</p> <ul style="list-style-type: none"> The Guide for Candidates (School District) summarizes the Ethics Rules that apply to school district/technology center candidates. Available at www.ethics.ok.gov under the “Campaigns” tab, “Local Candidates” link.
<input type="checkbox"/>	<p>Prior Committee Information</p> <p>Does this candidate have an <u>active</u> School District/Technology Center campaign committee for a prior election?</p> <p>YES: Discontinue with this Checklist and use the “Local Transition Checklist” available at www.ethics.ok.gov under the “Campaigns” tab, “Local Candidates” link, “School & Technology Center Districts” page.</p> <p>NO: Continue to the next step.</p>
<input type="checkbox"/>	<p>Name the Campaign Committee</p> <p>A campaign committee name must include the following:</p> <ol style="list-style-type: none"> Name of the candidate (i.e., full name, first name, middle name or last name of candidate); and Year of the election <p>Examples: “Doe for School Board 2024” or “John Doe for School Board 2024” are acceptable names for a campaign committee.</p>
<input type="checkbox"/>	<p>Identify Officers for the Committee <i>(Treasurers & Deputy Treasurers shall be Oklahoma residents)</i></p> <ul style="list-style-type: none"> Chair and Treasurer are required officers. The same person, including the candidate, may be Chair, Treasurer, or both. A Deputy Treasurer is optional but recommended. The campaign may have other officers and personnel; however, none of these officers will relieve the Chair, Treasurer, candidate, or others of their legal obligations under the Ethics Rules. NOTE: The Treasurer is legally responsible for the filing of timely and accurate reports for the school board campaign and maintaining all associated records for at least four years.
<input type="checkbox"/>	<p>Open a Campaign Committee Depository <i>(bank, credit union, or other financial institution)</i></p> <ul style="list-style-type: none"> The depository account name must be the full name of committee, which includes the name of the candidate and year of the election. The depository must ordinarily do business in Oklahoma. An employer ID Number (EIN) may be obtained at www.irs.gov. <p>NOTE: All campaign funds accepted are required to be deposited in the committee’s depository. Candidates who spend personal funds for campaign expenses may be reimbursed with campaign committee funds within 90 days of the expense. After the 90 days, non-reimbursed expenses are considered contributions to the campaign from the candidate, must be reported accordingly, and are not able to be refunded.</p> <p>All campaign expenditures are required to be reported by transaction date even if not expended from the depository.</p>

<input type="checkbox"/>	<p>Register with the School District Clerk</p>	<ul style="list-style-type: none"> • Has in excess of \$1,000 been received for the campaign? • Has in excess of \$1,000 spent on the campaign? <p>NOTE: The \$1,000 threshold includes candidate’s personal funds spent on his/her own campaign.</p> <p>YES: A “yes” to <u>either</u> of these questions, <u>requires</u> the filing of a Statement of Organization with the School District Clerk within 10 calendar days of exceeding \$1,000 of activity for the campaign. Go to next section.</p> <p>NO: A “no” to <u>both</u> questions, means a Statement of Organization is not required to be filed at this time, but once \$1,000 in activity is exceeded, a Statement of Organization must be filed within 10 calendar days. Campaign committees with \$1,000 or less of activity are not required to register or file reports.</p>
<input type="checkbox"/>	<p>File a <i>Statement of Organization</i> with the School District Clerk (if required to register)</p>	<ul style="list-style-type: none"> • Statement of Organization form (registration document) is available on the Ethics Commission website at www.ethics.ok.gov under the “Campaigns” tab, “Local Candidates” link and then to the “School” page to find the reporting forms. • Save the form to your computer to type on the form or print the form and fill out the by hand. • After the form is complete, file the Statement of Organization with the School District Clerk.
<input type="checkbox"/>	<p>File <i>Contributions and Expenditures Reports</i> as Required by the Ethics Rules (If required to register)</p>	<ul style="list-style-type: none"> • Quarterly reports are required in non-election years, and pre-election and partial quarter reports are due in election years, see reporting calendar on website. • For each required filing period, file the Contributions and Expenditures Summary Report and any schedules (A-J) that apply. Do not include blank schedules. • The fillable report forms are available on the Ethics Commission website www.ethics.ok.gov under the “Campaigns” tab, “Local Candidates” link, and then to the School page to find the reporting forms. • File reports until a “Final Report” is filed and the campaign committee is properly dissolved in accordance with the Ethics Rules see “Local Dissolution Checklist” under “Checklists & Information.”
<input type="checkbox"/>	<p>File <i>Continuing Report of Contributions (CRC)</i> as Required by the Ethics Rules</p>	<ul style="list-style-type: none"> • Continuing Report of Contributions (CRC) reports are only due during the two weeks before an election in which the candidate’s name is on the ballot (i.e., primary, runoff, or general). • These reports must be filed within 24 hours of receiving contributions totaling more than \$1,000 from a single source, and also with each subsequent contribution from that source regardless of value. • Loans, campaign expenses using personal funds, monetary contributions, and in-kind contributions from a single source are all contributions aggregated (totaled) to determine if a CRC (24-hour) report is required.
<input type="checkbox"/>	<p>File Personal Financial Disclosure Statement (PFD)</p>	<ul style="list-style-type: none"> • Newly elected officers will file the PFD within 30 days of assuming office. Then annually between January 1st and May 15th of each year. This report will cover the previous calendar year. The PFD is available on the “School District Campaigns” page.
<input type="checkbox"/>	<p>Maintain All Records for 4 Years</p>	<ul style="list-style-type: none"> • The committee must retain all receipts, bank statements and other documentation supporting the Contributions and Expenditures Reports for at least FOUR (4) years. The Committee is required to provide these documents to the Ethics Commission upon request.

Questions about the Ethics Commission Rules or Filing Requirements?
Call the Ethics Commission staff at (405) 521-3451 or email the staff at ethics@ethics.ok.gov