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Reviewing Candidate Applications for Local Political Subdivisions

Election Law Seminar 2023



Topics Covered

- Notice Requirements
- Candidate Filing Deadlines
- Methods of Filing Candidate Applications
- Review of Candidate Applications



Resources

Local Election Official (Cities, Schools, and Other Political Subdivisions) https://www.sos.state.tx.us/elections/laws/local-laws.shtml

Candidacy Corner

- <u>Candidacy for Local Political Subdivisions</u>
- Voter Registration for Candidates
- Terms, Qualifications, and Vacancies



Filing for Public Office - Posted Notice

• General Elections:

- <u>Notice of Deadline to File Applications for Place on the</u> <u>Ballot</u>
- Must be Posted 30 days before 1st day to file:
 - Monday, December 18, 2023 for the May 4, 2024 election

• Special Elections:

 No posting requirement, but we recommend posting something that includes filing deadline dates/times once the special election has been ordered.



Web Notice - Requirements

- Political subdivisions with authority to impose a tax that at any time on or after January 1, 2019 maintained a publicly accessible Internet website must provide certain relevant information on their website.
- The requirements and deadline for filing for candidacy of each elected office of the political subdivision which shall be continuously posted on website for at least one year before the election day for the office.
 - If entity has taxing authority
 - This means you will need to know your requirements accurately, before the filing period



Filing Deadlines – General Elections

• First Day to File

- General Elections (Uniform Election Date)
- 30 days before filing deadline.
 - Notice of Deadline to File Applications for Place on the Ballot
 - Must be Posted 30 days before 1st day to file

Filing Deadline

- General Elections (Uniform Date)
 - Regular Candidates:
 - 5:00 pm, 78th day before election day. (Friday, February 16, 2024)
 - Write-in Candidate Deadline
 - 5:00 pm, 74th day before election day. (Tuesday, February 20, 2024)



Candidate Filing Period

May 4, 2024 Election
 –January 17, 2024 – February 16, 2024

November 5, 2024
 –July 20, 2024 – August 19, 2024



Filing Deadlines – Special Elections

• First Day to File

- Day special election is ordered.

• Filing Deadline

- Windows are outlined by TEC Section 201.054.



Filing Deadlines – Write-in Candidates

- Must file a Declaration of Write-in Candidacy
 - Filing Deadlines
 - General Election: 5:00 pm on the 74th day before election day (withdrawal deadline – 5:00 pm on the 71st day before election day)
 - Special Election to fill a Vacancy: Same deadline as for regular candidates to file application for a place on the ballot (withdrawal deadline –5:00 pm on the 5th day after filing deadline)



Filing for Public Office - Filing Authority

Type of Entity	Filing Authority
City	City Secretary
School District	Secretary of School Board or designee
Water District	Secretary of Board or Presiding Officer or Agent, if permitted under Water Code
Hospital District	Secretary of the Board, or designee
Junior Colleges	Secretary of the Board
Library District	Secretary of the Board, or Presiding Officer
Emergency Services District	Multi-County District, County Clerk of each County.

- Employee Rule
- Delegation of Duty
 - Permitted <u>within</u> political subdivision
 - NOT permitted between political subdivisions.



Method of Filing

- Applications can be delivered in person, by mail, by fax, or by email.
 - If by mail, must look at time of receipt <u>NOT</u> postmark.
 - Receipt = actual possession of filing authority or agent, or time deposited in the authority's mail box.
 - Application cannot be submitted in parts. All parts must be submitted at the same time.
 - Section 1.007: Application can be received by any employee at the usual place of business.



Candidate Applications

- <u>Application for Place on General Election Ballot</u> (2-49)
- <u>Application for Place on Special Election Ballot (2-50)</u>
- <u>Declaration of Write-in Candidacy</u> (2-55)

• Applications and more can be found at: <u>https://www.sos.texas.gov/elections/forms/pol-sub/index.shtml</u>



Using the Correct Application Forms

- Forms can be accessed on the following pages:
 - Forms Manual
 - May uniform election law calendar
- If you are having trouble accessing the new forms, clear your cache on your web browser.
- How to determine if it's the correct form...



-49								
Prescribed by Secretary of State section 141.031, Chapters 143 and 14	4. Texas Election (Code						
9/2023								
	CATION FO	R A PLAC	E ON THE	BALLOT	FOR A GEN	IERAL EL	ECTION	
	R A CITY, SO							
INFORMATION IS REQUIRED TO E			ED AS OPTION	AL ¹ Failure to p	provide required			
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my nickname does not consider been commonly known by this r								
Election Code regarding the rule					cuse review set		1, 52.052 010 52	
Before me, the undersigned aut	hority, on this d	ay personally	appeared (na	me of candid	ate)			who
being by me here and now duly								
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eing a candidate for the office								Constitution and
aws of the United States and o his state. I have not been dete								
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any prior felony conviction, and								
any such final felony conviction tatus constitutes a Class B misc								
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							Print	Reset

Things to Look for:

- 9/2023 Revision Date
- Box on Felony Conviction Status

Other Changes

- More boxes marked "optional"
- More references to Texas Election Code provisions on nicknames
- Revised Oath
- More information for filing authority to fill out

14



11/27/2023

Texas Secretary of State Elections Division

Review of Application

• Form, Content and Procedure

- Was the candidate application submitted timely?
- Was it filled out properly?
- Did they include all the relevant paperwork, if applicable?

• Eligibility

– On the face of the application, does the candidate meet the eligibility requirements associated with that office?



Review of Candidate Application

• Form, Content, and Procedure

- Review must be completed no later than 5th day after application is received (unless there is a petition).
- Accepting application does not preclude a later determination that there is a deficiency in the application.
- If rejecting, must do so <u>immediately</u> and deliver to candidate a <u>written notice of rejection</u>.
- Cannot challenge after the 50th before election day



Filing Fee/Petition Signatures

- Most political subdivisions do not have a filing fee/petition requirement.
- Some, but not all, home-rule cities have a candidate filing fee/petition requirement.

Refer to your city charter to verify.



Review of Candidate Petition (if Applicable)

- Review of Petition (141.032, TEC)
 - Petition is part of application and review should be completed as soon as practicable.
 - Deficiency in petition cannot be cured with information provided in application.
 - Unless the petition is challenged, the authority is only <u>required</u> to review the petition for facial compliance with the applicable requirements as to form, content, and procedure.



Candidate Eligibility

- Eligibility for Public Office (141.001, TEC)
 - US Citizen
 - 18 years of age or older
 - No final judgment indicating:
 - Totally mentally incapacitated or
 - Partially mentally incapacitated without the right to vote
 - No final felony conviction
 - Unless pardoned or released from resulting disabilities
 - Resided continuously in the state for 12 months
 - Resided continuously in the territory for 6 months.
 - Registered voter of the territory

NOTE: Some offices have exclusive eligibility requirements, some laws are only partially conflicting, and for some offices all of Section 141.001 applies.



Administrative Declaration of Ineligibility

 Deadline for declaration in time to remove from ballot is different.

• Check the calendar for that election day.



Developing Your Process



11/27/2023

Texas Secretary of State Elections Division

Process for Receiving Candidate Filings

- Develop a written process/checklist.
- Determine who will receive applications in your office.
 - Any employee at the usual place of business can receive applications, including volunteers (TEC Section 1.007).
- Determine where you will keep received applications before/after reviewing.



Receipt v. Acceptance

- Be cautious with your word choice!
- **Receipt** of an application is taking possession of a candidate's application.
- Acceptance of an application is making a determination that a candidate's application is complete and the candidate's name will be on the ballot.



When Receiving the Application...

If candidate is hand delivering

- 1. Take possession of application
- 2. Initial review for completeness
 - Are all the required boxes filled in?
 - Did the candidate include filing fee or nominating petition, if applicable?
 - Has the application or petition been notarized?
- 3. If the application has not been signed and notarized, and you or someone in your office is a notary, then proceed with having the candidate sign/notarize the applications.
 - You can only notarize an application that hasn't been signed! If you are notarizing, the candidate must sign the application in your physical presence.
- 4. Immediately date/time stamp it!
 - Separate date/time stamp machine or hand write it
- 5. Make a copy for the candidate of their application and filing fee/petition.
- 6. Tell the candidate that the application has been received by your office and that you will review it to make a determination on whether the application should be accepted/rejected.
- 7. Complete review for completeness/acceptance.
- 8. Make a decision on acceptance/rejection/eligibility and notify the candidate in writing of your decision.



When Receiving Application...

If candidate delivers application by fax, mail, or email

- 1. Immediately date/time stamp it!
 - Separate date/time stamp machine or hand write date/time
- 2. Review for acceptance.
 - Review completeness of applications
 - Look at position they are running for and review qualifications for office
 - How long have they lived in the district?
 - Are they required to be a registered voter by a certain time?
 - Did they include the correct filing fee or the correct number of petition signatures?
 - Review answers in boxes
- 3. Make a decision on acceptance/rejection/eligibility and notify the candidate in writing of your decision.



2-49 Prescribed by Secretary of State Section 141.031, Chapters 143 and 144, Texas Election Code 09/2023

APPLICATION FOR A PLACE ON THE BALLOT FOR A GENERAL ELECTION

FOR A CITY, SCHOOL DISTRICT OR OTHER POLITICAL SUBDIVISION ALL INFORMATION IS REQUIRED TO BE PROVIDED UNLESS INDICATED AS OPTIONAL¹ Failure to provide required information may result in rejection of application.

APPLICATION FOR A PLACE ON THE		GENERAL ELECTION BALLOT
TO: City Secretary/Secretary of Board	(name of election)	Box 1
I request that my name be placed on the above-name	ed official ballot as a candidate fo	r the office indicated below.
OFFICE SOUGHT (Include any place number or other	distinguishing number, if any.)	INDICATE TERM BOX 3
Box 2		FULL DUA S

Box 1: If left blank, not necessarily fatal.

Box 2: Should include distinguishing number, if applicable. Does not have to be stylized any certain way as long as you can determine which office the candidate is applying for.

Box 3: Must be completed if there is another office that has the same title but does not have place numbers. If it is blank, but you understand which office the application is for, you can accept.



L	FULL NAME (First, Middle, Last)	PRINT NAME AS YOU WANT IT TO APPEAR ON THE BALLOT*
	Box 4	Box 5
	DEDMANENT DECIDENCE ADDRESS /D	DUDUC MAILING ADDDDCCC (Ontingel) (CLU Contingent)

• Box 4: Full Name

- Legal name, but does not have to exactly match legal documents.
 - EX: John Michael Smith, John M. Smith, John Smith

• Box 5: Name as you want it to appear on ballot

- Nickname rules apply.
- Candidate may use any surname acquired by law or marriage.
- Titles are prohibited but are not grounds for rejection.



PERMANENT RESIDENCE ADDRESS (Do not include a P.O. Box or Rural Route. If you do not have a residence address, describe location of residence.)				ADDRESS (Optional) (A rrespondence, if available		you receive
спту Вох 6	STATE	ZIP	СІТҮ	Box 7	STATE	ZIP

- **Box 6:** Permanent Residence Address
 - MUST be completed by all candidates
 - Even candidates subject to confidentiality (judges and peace officers) must complete this box.
 - Candidates entitled to confidentiality under Government Code Section 552.1175 must *separately* request confidentiality from the filing authority for information on a candidate application
- BOX 7: Public Mailing Address, if Available.



Eligibility

Residency

- Is the candidate a resident of the territory they would be elected from? (If applicable)
- Is the address on their application located within the territory?
- Have they resided in the territory the proper amount of time? <u>(If</u> there is a durational residence requirement)

NOTE: Eligibility verification by the filing authority does NOT include whether the candidates actually live at the address provided. This is left up to the courts.

NOTE: Texas law does not allow a filing authority to make a conclusive determination about the location of a person's residence. Only a court of law may make such a determination.



	PUBLIC EMAIL ADDRESS (Optional) (Address for which you receive campaign related emails, if	OCCUPATION (Do not leave blank)	DATE OF BIRTH		VOTER REGISTRATION VUID NUMBER ² (Optional)
	available.) Box 8	Bo	9	Box /10	/	Box 11
Γ	TELEPHONE CONTACT INFORMATION (Optional)					
	Home: Box 12	Office:			Cell:	

• Box 8: Public Email Address, if available

 This is what they should use to receive campaign email. Public address does NOT mean the candidate's county or government email address as a public official.

• Box 9: Occupation

- Required per Section 141.031, Texas Election Code. However, please review <u>In re</u> <u>Anthony</u>, 642 S.W.3d 588 (Tex. 2022).
- Box 10: Date of Birth
 - Used to validate that the candidate meets minimum age requirements.
- Box 11: VR Number (VUID)
 - Not Required, but very helpful as it can help you to validate their VR status, if applicable.
 - Also puts the candidate on notice that they need to think about their current VR status.
- Box 12: Contact information
 - Optional, but helpful to you if you need to contact a candidate.



Eligibility

• Age

- Does the candidate meet the minimum age requirements required for that office?
- NOTE: Sec. 141.001 rule is 18 years of age by election day. However, for offices requiring voter registration by filing deadline, candidate will need to be 18 years old earlier.



Eligibility

Voter Registration

- Is the candidate a registered voter of the territory from which they are seeking office? (NOTE: This is not applicable to all offices. <u>Water districts are a major exception</u>.)
- Is the candidate's registration effective?
 - by the date of the filing deadline (for place on the ballot) OR
 - election day (for write-in)?
- A candidate's registration must be EFFECTIVE. It is not enough to have submitted a registration application.

<u>Status as Registered Voter</u>

- As Candidate (141.001(6), TEC)
- As Officeholder (601.009, Government Code)
 - 'A person may not qualify for a public elective office unless the person is a registered voter."
- Inconsistency in the Law



FELONY CONVICTION STATUS (You MUST check one)

I have not been finally convicted of a felony. Box 13

I have been finally convicted of a felony, but I have been pardoned or otherwise released from the resulting disabilities of that felony conviction and I have provided proof of this fact with the submission of this application.³

• **BOX 13:** Felony Conviction Status

- Must be completed.
- If they mark the second box, the candidate must provide documentation to provide proof that they have been pardoned or released from the resulting disabilities.
- See back of form for list of acceptable documents. Call SOS with questions!



Eligibility

• Felony Conviction

- Does the voter have a final felony conviction? If so, have they been pardoned or otherwise released from the resulting disabilities? (NOTE: Not all offices prohibit felony convictions.)
- School District eligibility Section 11.066, Education Code
- OAG Opinion <u>KP-0251</u> Felony Convictions and Candidacy



Eligibility / New Form

• Felony Conviction

- A candidate must provide an indication on their candidate application that the candidate has either not been finally convicted of a felony or if so convicted has been pardoned or otherwise released from the resulting disabilities.
- A person who has been convicted of a felony **shall include** in the application proof that the person has been pardoned or otherwise released from the resulting disabilities. The application form warns candidates to submit this information.
- Application form warns candidates that knowingly providing false information on their application related to their final felony conviction status is Class B Misdemeanor.
- Do not distribute old form!
- [Sections 141.031, 141.039, TEC]



LENGTH OF CONTINUOUS RESIDENCE AS OF DATE THIS APPLICATION WAS SWORN					
IN THE STATE OF TEXAS IN TERRITORY/DISTRICT/PRECINCT FROM					
	WHICH THE OFFICE SOUGHT IS ELECTED				
year(s)	year(s)				
month(s) Box	14 month(s)				

- BOX 14: Length of Continuous Residence
 - -Must be completed
 - Must indicate how long they have lived in the territory for which they are seeking office.



11/27/2023

Eligibility

Length of Continuous Residence

- Has the candidate been a resident of the territory elected from for the required period of time?
 - **Type A general-law city** requires a candidate for mayor to reside in the city for at least 12 months preceding election day and requires a candidate or alderman to reside in the territory the office is elected from on election day.
 - **Type B general-law city** requires a candidate for mayor or alderman to reside in the city for at least 6 months preceding election day.
 - Other political subdivisions should check laws or rules regarding residency for their entity.



As the filing authority, can I determine a candidate's residence?

No. An individual's residency is where an individual intends to return. In reviewing residency questions, the courts have consistently ruled that residency is a combination of intention and fact, and that the voter's intention must be reviewed to make a final determination of residence. <u>McBeth v. Streib</u>, 96 S.W.2d 992 (Tex. Civ. App.--San Antonio 1936, no writ). For example, the El Paso Court of Appeals held that "the voter's intention was material to a proper determination of the voter's residence requirement." <u>Simmons v. Jones</u>, 838 S.W.2d 298, 301 (Tex. App.--El Paso 1992, no writ).

Coupled with the voter's intention must be a physical connection to the place in which he or she is claiming residence. <u>Commercial Standard Ins. Co. v. Nunn</u>, 464 S.W.2d 415 (Tex. Civ. App.--Texarkana 1971, writ dism'd).

In the absence of judicial review, a person must generally be presumed to have the requisite intent.

Further, the Texas Supreme Court has not indicated a single or a combination of public records that conclusively establish residency.



Residence Determinations – Continued

If the candidate describes a residence address on the face of the application within the district and the state for the requisite amount of time, the filing authority must accept that statement.

Under Section 145.003(f) of the Texas Election Code, an administrative declaration of ineligibility may be made only if the application or a conclusive public record establishes the candidate's ineligibility.

Again, neither the courts nor the Texas Legislature have established a public document that conclusively establishes residency.



What if an elected person seems to have moved from their elected territory?

• In terms of the elections process, when a candidate files an application for a place on the ballot, he or she presents a sworn description on the face of the application as to the location of the person's residence, and the length of time at that location. The authority with whom the application is filed relies on this sworn description when reviewing the application for purposes of certifying the name to the ballot. In order to challenge this residence description, an opposing candidate would likewise need to challenge the application in court.



Continued

An officer is presumed to be a resident of the required territory he or she was elected to serve. To challenge this would require a judicial proceeding: specifically, a quo warranto hearing brought by the county or district attorney. <u>Whitmarsh v. Buckley</u>, 324 S.W.2d 298 (Tex. Civ. App., Houston, 1959, no writ hist.).

The Secretary of State's office is not a fact-finding tribunal (i.e., a court).



Before me, the undersigned authority, on this day personally being by me here and now duly sworn, upon oath says:	appeared (name of c	andidate)	, who
"I, (name of candidate)	, of		County, Texas,
being a candidate for the office of laws of the United States and of the State of Texas. I am a c this state. I have not been determined by a final judgment of mentally incapacitated without the right to vote. I am awar any prior felony conviction, and if so convicted, must provide any such final felony conviction. I am aware that knowingly status constitutes a Class B misdemeanor. I further swear the	itizen of the United St of a court exercising p e of the nepotism law, e proof that I have bee providing false inform	ates eligible to hold su robate jurisdiction to l Chapter 573, Govern n pardoned or otherw nation on the applicat	uch office under the constitution and laws of be totally mentally incapacitated or partially ment Code. I am aware that I must disclose rise released from the resulting disabilities of tion regarding my possible felony conviction
Box 15		TURE OF CANDIDAT	re
Sworn to and subscribed before me this the day of (day)			(name of candidate)
Signature of Officer Authorized to Administer Oath ⁴		Printed Name of Offic	cer Authorized to Administer Oath
Title of Officer Authorized to Administer Oath		Notarial or Off	

• Box 15: Oath and Notary

- Must be completed and signed and sworn to by candidate.
- If they leave blanks in statement of oath, it is not fatal if the application (Not Petition) contains the applicable information.
- Oath must be administered by someone authorized to administer oaths under Chapter 602 – list on back of form.
- Mistakes by the notary are not always fatal. Please call SOS for additional guidance if that happens.



Eligibility

- Oath and Notary
 - Was the oath properly administered and notarized?
 - The oath must be administered by a notary public or any other person authorized to administer an oath under Chapter 602 of the Texas Government Code.
 - For cities, the oath can be administered by the city secretary in a matter pertaining to the official business of the city. [Sec. 602.002]



TO BE COMPLETED BY FILING OFFICER: THIS APPLICATION IS ACCOMPANIED BY THE REQUIRED FILING FEE (If Applicable) PAID BY:						
This document and \$	This document and \$ filing fee or a nominating petition of pages received.					
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- **Box 16:** Completed by Filing Authority or Employee who received application.
 - Failure to complete this box is not fatal to an application!
 - Part of this box should be completed at the time the application has been received by the person who takes the application.
 - The remainder should be filled in after it has been reviewed and a disposition has been made on the application.
 - This contains information to help you know what actions have been taken and when on an application.
 - Section 1.007 provides that any employee at the usual place of business can receive the filing.



Questions?

elections@sos.texas.gov



11/27/2023

Texas Secretary of State Elections Division