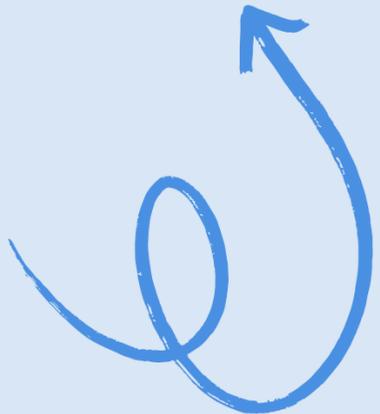


Creating Effective Candidate Packets

Alicia Richardson, TRMC
City Secretary/Chief Governance Officer
North Richland Hills

Lee Woodward, TRMC
City Secretary/PIO, La Porte



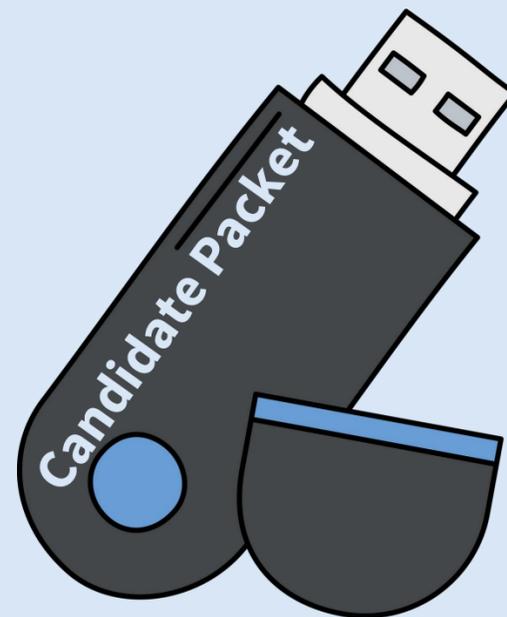
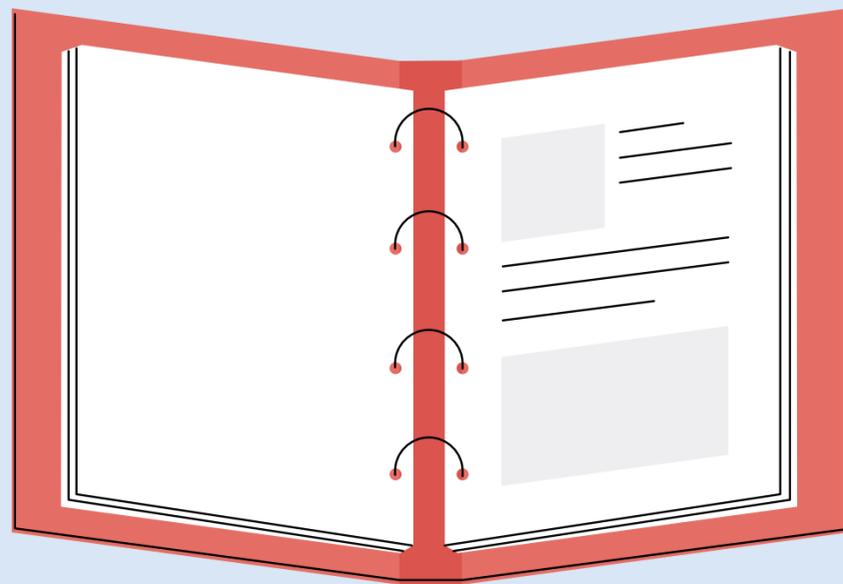


There are lots of attorneys at this conference, but we are not attorneys. Please do not construe anything in this presentation to be legal advice. It's not.

Understanding Candidate Packets

What's a candidate packet?

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



Candidate Forms

Candidate Packet (will be available by January 1)

Application - The loyalty oath is included on this form and must be notarized.

- o January 14, 2026 - first day to apply for a place on the May 2, 2026 Election ballot.
- o February 13, 2026 - last day to apply for a place on the May 2, 2026 Election ballot. The application must be filed with the City Secretary's Office before 5:00 p.m.
- o Please note that the application has a section for your email address. Your email is optional, but remember that candidate applications are publicly available and will be uploaded to the City's website.
- o **Request for Confidentiality for Candidates under Texas Government Code** - Pursuant to Section 552.1175 of the Texas Government Code, an elected public officer may request information (home address, home telephone number, emergency contact, date of birth, social security number, and family members restricted from public access).

Filing Fee or Petition - Article V, Section 5 of the City Charter requires that the candidate's application be accompanied by a filing fee of \$150 or a petition containing the valid signatures of at least 150 registered voters in the City of North Richland Hills.

Candidate Disclosure and Acknowledgment Form - The North Richland Hills City Charter, Article V, City Council, Section 2, Qualifications states that any member of the City Council who is convicted of a felony, or is convicted or pleads guilty or no contest to a misdemeanor or a felony involving a crime of moral turpitude for fraud, deceit, theft or dishonesty, before or while in office, shall immediately forfeit his or her office. (May 6, 2023 Charter Amendment Election)

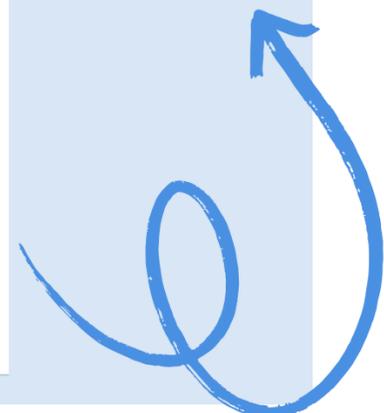
Appointment of Campaign Treasurer (Form CTA) and the **Instruction Guide**. The CTA Form is to be filed with the City Secretary's Office. Please note that under Texas Law, you must designate a Campaign Treasurer before any funds can be expended or campaign contributions accepted (this includes your filing fee). You may name yourself as Treasurer.

- o The back of the form offers a modified reporting option. Candidates who do not intend to accept more than \$1,110 in political contributions or expend more than \$1,110 in political expenditures (excluding filing fees) may elect to report under the modified reporting schedule.
 - o Candidates reporting under the modified schedule are not required to file pre-election reports (due 30 days and eight days before an election) or runoff reports.
- o The selection of modified reporting still requires you to file semiannual reports (July 15 and January 15). If you select modified reporting, you must file a Candidate/Officeholder Campaign Finance Report -

Quick Links

- o [Sample Ballot](#)
- o [Find Polling Location](#)
- o [Voting By Mail](#)
- o [Voter Registration](#)
- o [Tarrant County Elections](#)
- o [Texas Secretary of State](#)

[View All Links](#)



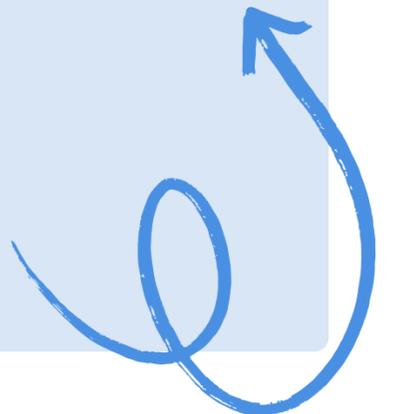
Understanding Candidate Packets

What's the statutory reference for candidate packets?

No requirement for candidate packets, unless your entity requires them.

Texas Election Code 1.010

Availability of Official Forms



So, why create a candidate packet?

Record of information that has been provided to the recipient.

A packet is an opportunity to set expectations and demonstrate transparency.

Your packet will be viewed by the public, and perhaps a future boss.

This may be a citizen's first interaction with your organization.

It's a continuing educational opportunity.

Showcase your professional writing and organization skills.

Candidates may be reluctant to ask questions or not know what to ask.

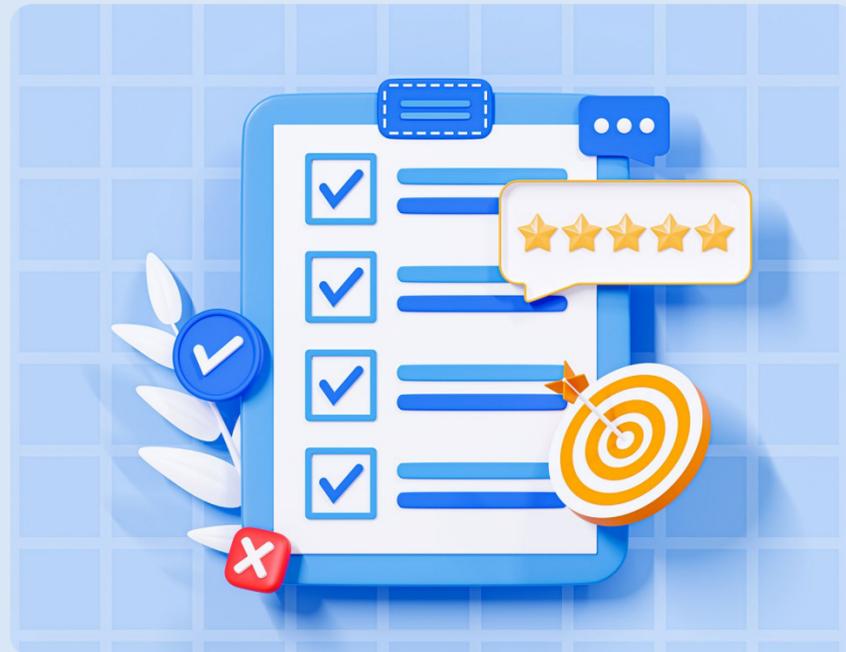
What should be included?

Basics



Items necessary to file for office
Welcome letter and contact
information for questions

Jurisdiction Specific



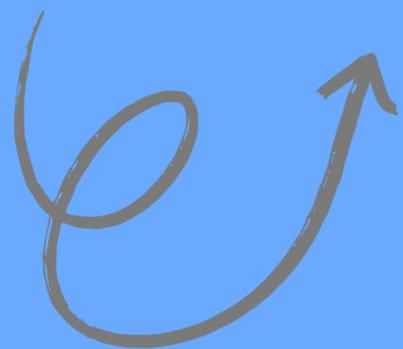
Documents that provide
information on local requirements
and/or restrictions

Texas Ethics Commission



Campaign finance related
forms and reports

Basics



Campaign Treasurer Appointment (CTA)

- Required to run for public office in Texas
- TEC Form
- Required before accepting contributions or making expenditures
- File with local authority (you) city/town candidates
- Filing fee is an expenditure

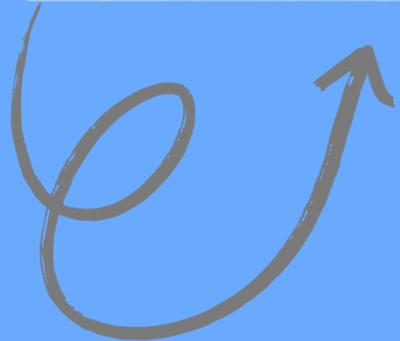
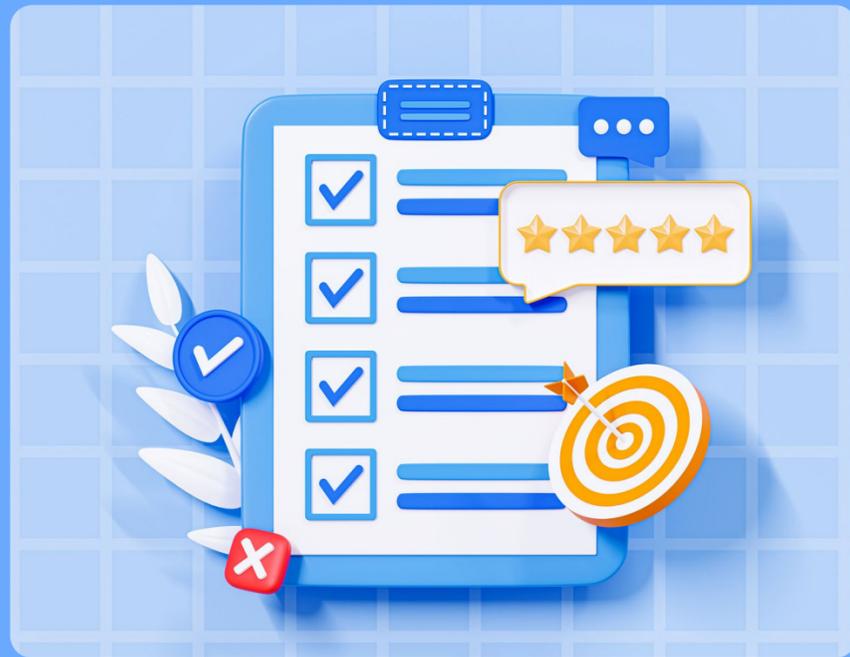
Application for Place on the Ballot

- General election
- Special election
- Declaration of write-in candidacy

Filing Fee or Petition (if applicable)

- Tx Election Code- Chapters 142-144
- Home Rule Cities- refer to City Charter

Jurisdiction- Specific Materials



Additional Candidate Qualifications

- Basic qualifications are in state statute
- City charter or bylaws
- Personal Financial Statement

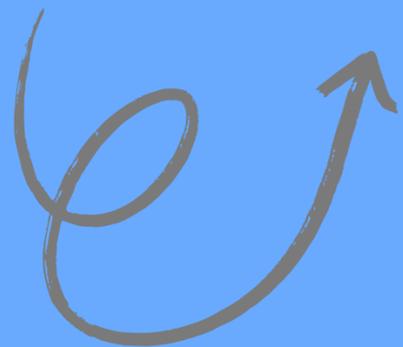
Entity Requirements or Restrictions

- Sign placement (maps)
- Reasonable regulations regarding the time, place, and manner of electioneering. Tex. Elec. Code 61.003(a-1).
- Resign to run

**EDUCATE EARLY AND SET EVERYONE UP
FOR SUCCESS!**

Texas Ethics Commission

512-463-5800



Authority

- Campaign Finance Law
- Forms and Instruction Guides
 - Appointment of Campaign Treasurer (CTA)
 - Candidate/Officeholder Campaign Finance Report

Resources/Publications

- Political Advertising: What You Need to Know
- Political Fundraisers: What You Need to Know
- Guide to a Local Filing Authority's Duties under the Campaign Finance Law
- First Steps for Candidates Running for a City Office
- Campaign Finance Guide for Candidates and Officeholders who file with local filing authorities
- Filing schedule

Top 5 Candidate Packet Pitfalls

- ✘ Missing or outdated forms
- ✘ No explanation or filing deadlines
- ✘ No contact information for follow-up questions
- ✘ Overly legalistic language
- ✘ Not tailored to your city's charter/state law

Candidate Packet Checklist



- Welcome letter from City Secretary
- Campaign Treasurer Appointment (CTA)
- Ballot Application
- Filing Fee or Petition (if applicable)
- Jurisdiction-specific qualifications
- Signage rules and restrictions
- TEC campaign finance forms & instruction guides
- Code of Fair Campaign Practices (optional)
- TEC filing schedule / important election dates
- Election calendar (SoS & TMCA)
- Maps - district/ward/city
- Duties of the position
- Candidate bio/photo form (if applicable)
- Helpful links: Charter, bylaws, ethics policy, budget
- Calendar of city events/meetings
- City department contact list

The Story Your Candidate Packet Tells

Transparency



Equal Access to
Information

Communicate
Professionalism



Reduces risk of
miscommunication

Educate & Empower
First-Time Candidates



Encourages civic
participation

Election Roles

Texas Secretary of State

- Chief Election Official
- Oversees administration of elections
- Application for place on ballot
- Interprets election code
- Designates election date for runoff elections

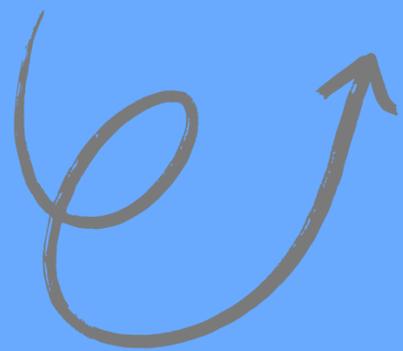
Texas Ethics Commission

- Interprets & enforces campaign finance law
 - Contributions
 - Expenditures
- Appointment of Campaign Treasurer
- Campaign finance forms & instruction guides
- Political advertising & fundraising
- Filing schedule

Office of the Attorney General

- Enforce election law
- Investigates voter fraud
- Legal opinions, when requested by state officials or agencies

Essential Tips for Creating Candidate Packets



Proofreading

Ensure accuracy by reviewing all materials carefully.

Have coworker from another department review the packet.

TEC Guides

The instruction guides are invaluable.

Candidates go to resource.

Review Forms

Current forms from the SoS and TEC sites.

Verify links to sites and forms work properly.

Keep It Simple

Organize forms.

Succinct language.



Key Takeaways

Creating Effective Candidate Packets



[Secretary of State– Important Election Dates](#)

[Secretary of State – Elections Home Page](#)

[Secretary of State – Election Forms Index](#)

[Texas Ethics Commission – Filing Schedules](#)

[Texas Ethics Commission – Local Filers](#)

[Texas Constitution and Statutes – Home](#)



Creating Effective Candidate Packets