




# Welcome to COPP's school candidate and committee training!

1. School candidate registration and reporting requirements
2. School committee registration and reporting requirements
3. COPP's role in the election process
4. Tips and additional resources

# 1. School candidate registration and reporting requirements


Individuals seeking election to public office in Montana are required to file as a candidate with COPP, MCA [13-37-201](#). This includes individuals seeking election to a school board/trustee/etc. position



File as a candidate with COPP by submitting a C-1A Statement of Candidate. The C-1A must be filed electronically, using Montana's Campaign Electronic Reporting System (CERS)

# 1. School candidate registration and reporting requirements

An individual becomes a candidate by: receiving or soliciting campaign contributions; making campaign expenditures; or filing as a candidate with the election administrator, [MCA 13-1-101\(8\)](#)



Need to file the C-1A with COPP within 5 days of becoming a candidate!

# Campaign Registration View

» Statement of Candidate (C1 or C1-A)

## Candidate Information

Candidate Full Name:	Cook (COPP Test Account!), Scott	Physical Address:	
Mailing Address:	315 Lexington Dr. Bozeman, MT 59715	Alternate Phone:	
Home Phone:		Candidate Type:	State District
Campaign Email Address:		Resident County:	Gallatin
Election Year:	2050	Current Status:	Amended
Office Sought:	House District No. 01	Amended Date:	10/03/2023
Political Party:	Green	C118 Received Date:	
Date Filed:	09/14/2016	Bank Address:	101 Bozeman, MT 59715
D1 Received Date:			
Reporting Status:			
Bank Full Name:	Lending Tree		

## Campaign Treasurer Information

Treasurer Full Name:	Thornton, Austin	Physical Address:	
Mailing Address:	13 Teslow Dr. Bozeman, MT 59715	Alternate Phone:	
Home Phone:			
Home or Personal Email Address:			

## Deputy Treasurer Information

# 1. School candidate registration and reporting requirements

Guidance for accessing CERS and using it to file a C-1A Statement of Candidate is available on COPP's website, [here](#)



COPP Compliance Specialists are available to assist in this process- contact us!

# 1. School candidate registration and reporting requirements

Candidates in certain school districts are exempted from registering with COPP, MCA [13-37-206\(1\)](#)

Exemption if the school district is in:

- (a) first-class district located in a county having a population of less than 15,000;
- (b) a second- or third-class district; or
- (c) a county high school district having a student enrollment of less than 2,000.

## DISTRICTS REQUIRED TO REPORT CAMPAIGN FINANCE ACTIVITY

*First Class Districts in Counties with Populations of 15,000 or More who Must Report to the Montana Commissioner of Political Practices (MCPP) for FY 2022 Elections*

[MT Commissioner of Political Practices Webpage](#)

### Cascade

1. Great Falls EL
2. Great Falls HS

### Flathead

1. Kalispell EL
2. Flathead HS
3. Columbia Falls EL
4. Columbia Falls HS
5. Somers EL
6. Whitefish EL
7. Whitefish HS
8. Evergreen EL

### Gallatin

1. Belgrade EL
2. Belgrade HS
3. Bozeman EL
4. Bozeman HS

### Hill

1. Havre EL
2. Havre HS

### Lake

1. Polson EL
2. Polson HS
3. Ronan EL
4. Ronan HS

### Lewis and Clark

1. Helena EL
2. Helena HS
3. East Helena K-12

### Lincoln

1. Libby K-12

### Missoula

1. Missoula EL
2. Missoula HS
3. Hellgate EL
4. Frenchtown K-12

### Park

1. Livingston EL
2. Park HS

### Ravalli

1. Corvallis K-12
2. Stevensville EL
3. Stevensville HS
4. Hamilton K-12

### Silver Bow

1. Butte EL
2. Butte HS


### Yellowstone

1. Billings EL
2. Billings HS
3. Laurel EL
4. Laurel HS
5. Lockwood K-12

[2023 Districts Required to Report Campaign Finance Activities \(003\).pdf \(mt.gov\)](#)

# 1. School candidate registration and reporting requirements

School candidates that receive contributions or make expenditures of \$500.00 or more are required to file finance reports with COPP. Candidates under \$500.00 are exempted from reporting under MCA [13-37-226\(5\)](#) and [44.11.304](#), Administrative Rules of Montana




Finance reports are also filed electronically, via CERS. Use form C-5, the candidate campaign finance report



# 1. School candidate registration and reporting requirements


Finance reports disclose contributions received and expenditures made by the candidate



Finance reports are not public until Filed by the candidate!

# 1. School candidate registration and reporting requirements

For the May 7, 2024 school elections, finance reports are due on or before: March 8 (covers the period of initial activity through March 3); April 2 (covers March 4-March 28); April 25 (March 29-April 20); and May 27 (April 21 through May 22)



The full [2024 school candidate reporting calendar](#) is available on COPP's website

## School Candidates

### Candidate Finance Report Calendar

May 7, 2024 election

**Report form C-5 must be filed for each reporting period** to disclose all transactions, if any that occurred during the specific reporting period.

<b>Filing Deadline</b>	<b>Reporting Period</b>
March 8	Date of first contribution through March 3
April 2	March 4 through March 28
April 15 through May 6 (C-7 & C-7E Reporting Period)	File form C-7 within 2 business day if a \$450 contribution from a single source is received between April 15 and May 6  File form C-7E within 2 business days if an expenditure of \$450 or more is made between April 15 and May 6
April 25	March 29 through April 20
May 27	April 21 through May 22
	Reference <a href="#">13-37-226(1)(e)</a> for additional reporting dates.

# 1. School candidate registration and reporting requirements

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- Questions about school candidate registration and reporting requirements?



## 2. School committee registration and reporting requirements

Political committees organized to support or oppose school candidates or ballot issues receiving contributions or making expenditures of \$250.00 or more are required to file with COPP, MCA [13-37-201](#)

File as a political committee with COPP by submitting a C-2 Statement of Organization, in CERS

Certain committees organized to support or oppose school candidates or ballot issues are exempted from registering with COPP, MCA [13-37-206\(1\)](#)

## 2. School committee registration and reporting requirements

For outside committees (i.e., not the district) involved in a school election, two different types of classification:

Independent committee (PAC)- a committee that is organized specifically to support or oppose candidates seeking election

Ballot issue committee- a committee that is organized specifically to support or oppose ballot issues to be voted on

## 2. School committee registration and reporting requirements

School districts that make expenditure/s of \$250.00 or more related to a ballot issue must register with COPP. File as an 'Incidental-Local Government' committee

This \$250.00 figure does not include costs associated with administering the actual election

**Remember: a school district itself cannot support or oppose ballot issues!**

## 2. School committee registration and reporting requirements

Guidance for accessing CERS and using it to file a C-2 Statement of Organization is available on COPP's website, [here](#)

COPP Compliance Specialists available to assist in this process-  
contact us!

File the C-2 Statement of Organization within 5 days of first activity



# Committee Registration View

» Statement of Organization (C2)

## ▼ Committee Information

Committee Name: ACME School District (COPP Test)

Mailing Address: 1209 8th Ave. 1209 8th Ave., MT 59601

Committee Type: Incidental - Local Government

Received Date: 02/01/2024

Current Status: Active

Physical Address:

Incorporated: N

Election Year: 2024

Amended Date:

## ▼ Committee Treasurer Information

Treasurer Full Name: Coyote, Wile E

Mailing Address: 1209 8th Ave. Helena, MT 59601

Home Phone:

Home or Personal Email Address:

Physical Address:

Alternate Phone:

## ▼ Deputy Treasurer Information

## ▼ Additional Officer Information

## ▼ Purpose of Committee and/or Name(s) of Candidate(s) or Ballot Issue(s) Supported or Opposed

Candidate/Issues	Position	Issue Status
Educate public about ACME School District bond issue 2024	Education	On ballot

## 2. School committee registration and reporting requirements

School committees that receive contributions or make expenditures of \$500.00 or more are required to file finance reports with COPP. Committees under \$500.00 are exempted from reporting under MCA 13-37-226(5) and 44.11.304, Administrative Rules of Montana

Finance reports are also filed electronically, via CERS. Use form C-6, the committee reporting form

## 2. School committee registration and reporting requirements

Finance reports disclose contributions received and expenditures made by the committee

Finance reports are not public until Filed by the committee!

## 2. School committee registration and reporting requirements

For the May 7, 2024 school elections, committee finance reports are due on or before: March 8 (covers the period of initial activity through March 3); April 2 (covers March 4-March 28); April 25 (March 29-April 20); and May 27 (April 21 through May 22)

The full [2024 school committee reporting calendar](#) is available on COPP's website

## School Committees

### Committee Finance Report Calendar

May 7, 2024 election

**Report form C-4 or C-6 must be filed for each reporting period** to disclose all transactions, if any that occurred during the specific reporting period.

Filing Deadline	Reporting Period
March 8	Date of first contribution through March 3
April 2	March 4 through March 28
April 25	March 29 through April 20
April 25 through May 6 (C-7 & C-7E Reporting Period)	File form C-7 within 2 business day if a \$500 contribution from a single source is received between April 25 and May 6  File form C-7E within 2 business days if an expenditure of \$500 or more is made between April 25 and May 6
May 27	April 21 through May 22
	Reference <a href="#">13-37-226(2)(e)</a> for additional reporting dates.



## 2. School committee registration and reporting requirements

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Questions about school committee registration and reporting requirements?

### 3. COPP's role in the election process

- Montana's Office of the Commissioner of Political Practices (COPP) was created by Montana's citizen legislature in 1975
- The office was created to establish disclosure, via reporting by candidates and political committees, of money used to influence Montana's elections

### 3. COPP's role in the election process

- COPP reviews all registrations and finance reports filed by candidates and political committees, MCA's [13-37-121](#) and [123](#)
- After this review has been conducted, COPP may send the candidate/committee an Inspection Report identifying or pointing out items that may not be reported properly, may require additional information to meet Montana's disclosure requirements, etc.



### 3. COPP's role in the election process

- COPP Compliance Specialists work to educate candidates and committees on Montana's campaign finance reporting and disclosure requirements
- If you receive an Inspection Report from COPP and have questions about it, please ask!

### 3. COPP's role in the election process

- COPP is required by law to notify the election administrator of those candidates whose name may not appear on an official ballot because they have not filed all required registration/reports, [MCA 13-37-126](#)
- For the May 7, 2024 school elections, COPP needs to send this notification no later than April 5. Means we need the election administrator conducting the election to notify us of all candidates who have filed before that date!

## Montana Code Annotated 2023

TITLE 13. ELECTIONS

CHAPTER 37. CONTROL OF CAMPAIGN PRACTICES

Part 1. Commissioner of Political Practices

### Names Not To Appear On Ballot -- Statewide Initiative Not To Appear On Ballot

**13-37-126. Names not to appear on ballot -- statewide initiative not to appear on ballot.** (1) The name of a candidate may not appear on the official ballot for an election if the candidate or a treasurer for a candidate fails to file any statement or report as required by **2-2-106** or this chapter.

(2) A vacancy on an official ballot under subsection (1) may be filled in the manner provided by law, but not by the same candidate.

(3) A statewide initiative may not appear on the official ballot for an election if the treasurer for the primary ballot committee supporting the statewide initiative fails to file any report as required by this chapter.

(4) A vacancy on an official ballot under subsection (3) may not be filled.

(5) (a) In carrying out the mandate of this section, the commissioner shall, by a written statement, notify the secretary of state and the election administrator conducting an election when a candidate or a candidate's treasurer has not complied with **2-2-106** or when a candidate or candidate's treasurer or the treasurer for the primary ballot committee supporting a statewide initiative has not complied with the provisions of this chapter and that the candidate's name or the statewide initiative may not appear on the official ballot.

(b) Except as provided in subsection (5)(c), the commissioner shall provide the notification:

(i) 2 calendar days before the certification deadline provided in **13-10-208** for statewide primary elections and **20-20-401** for school district elections; and

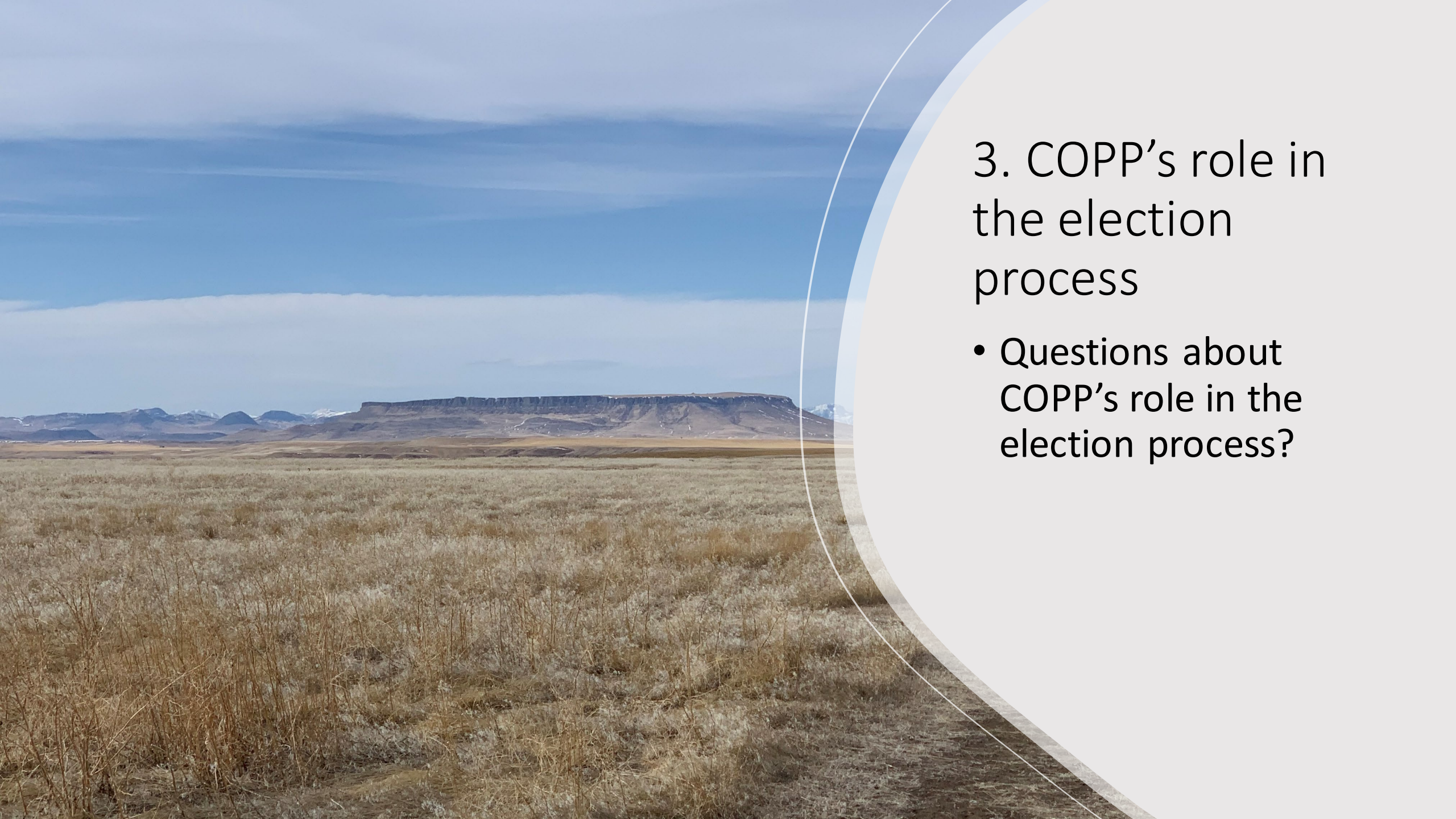
(ii) 7 days before the certification deadline provided in **13-12-201** for general elections.

(c) (i) For a municipal primary election, the commissioner shall provide the notification no later than 5 days after the candidate filing deadline.

(ii) For a municipal general election, the commissioner shall provide the notification no later than September 30 or, if September 30 falls on a Saturday or Sunday, no later than the preceding Friday.

### 3. COPP's role in the election process

- Ultimately, it is the candidate or political committee's responsibility to meet all relevant registration and reporting requirements!
- If a school candidate or political committee has questions about registration or reporting requirements, please contact COPP!



### 3. COPP's role in the election process

- Questions about COPP's role in the election process?

## 4. Tips and additional resources

***Tip #1: Don't wait until reporting day to begin working on a finance report!***

Candidates and committees are encouraged to enter contributions received and expenditures made into CERS as they happen, rather than waiting for reporting day

This provides the candidate/committee with additional time to make sure all information is entered completely and correctly, to work through any technical difficulties, etc.

## 4. Tips and additional resources

***Tip #2: Don't wait until reporting day to file your report!***

Candidates and committees may file finance reports anytime after the end of the reporting period

The March 8 report can be filed anytime March 3 through March 8; the April 2 report can be filed anytime March 28 through April 2; etc.

Filing early helps guard against unexpected technical glitches and similar problems day-of filers may experience when using CERS

## 4. Tips and additional resources

***Tip #3: Please don't wait until reporting day if you have questions about accessing CERS or filing a finance report!***

COPP Compliance Specialists are happy to answer any questions you may have, and can provide assistance or guidance in navigating the CERS system as appropriate

COPP staff receive an extremely high volume of phone calls, emails, and in-person visitors on a given reporting day

While we try to get to everyone on reporting day, we may not be able to provide assistance or guidance to everyone!



## 4. Tips and additional resources

- ***Additional resources***

- [Accounting and Reporting Manual for Candidates and Treasurers](#) (Green Book)
- [Candidate and Treasurer Guide to Navigating CERS](#)
- [Accounting and Reporting Manual for Political Committees](#) (Pink Book)
- [Committee Guide to Navigating CERS](#)
- See the [Education and Resources](#) page on COPP's website for additional information, guides, etc. about campaign finance reporting and disclosure!



*Contact us!*

- Telephone: (406)-444-2942
- Email: [cpphelp@mt.gov](mailto:cpphelp@mt.gov) or [cppcompliance@mt.gov](mailto:cppcompliance@mt.gov)
- In-person: 1209 8<sup>th</sup> Ave. in Helena