## Fall 2016 Campaign Finance Reporting Instructions

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<td>2. One Financial Sheet for EACH CANDIDATE</td>
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This instruction packet is the official guideline the Election Board will provide to candidates to aid in filling out financial sheets. Incorrectly filling out financial sheets could render the ticket, independent candidate, and/or candidates on a ticket to be disqualified. The Election Board and Commissioner Elections is not liable for any provided misinformation regarding financial sheets or for any mistakes made by the candidate, ticket representative, ticket affiliate, ticket volunteer, or anyone else turning in financial sheets. Individual candidate and independent candidate financial sheets are to be filled out by the individual whose campaign the financial sheet is documenting and attested through signature that the financial sheet is honest and correct. Financial sheets for tickets must be filled out and signed by the ticket representative on file with the Election Board and Commissioner of Elections and attested through signature that the financial sheet is honest and correct. Violation of honesty regarding financial sheets will result in disqualification and may be reported to the University Dean of Students.

Each finance sheet must be signed by the candidate

A. Instructions for filling out the FINANCIAL SHEET FOR TICKETS AND INDEPENDENT CANDIDATES. This form is to be used by those who are filing financial sheets for their entire ticket, as well as those who are running independent of an organized ticket.

1. In the Spending Limit Section, calculate your ticket’s/individual campaign’s spending limit by:

   a. Writing the number of candidates on the “Quantity” line of the position you are running for. If you are independent, you will write the number “1” on the line; if you are filling out a sheet for the ticket, you will most write in multiple candidates on the line.

   i. Note that the President and Vice President count as one candidate and run as a pair.

   b. Next, using the table below, write in the maximum amount the position is allowed to spend on the “Limits” line of the position you are running for. If a ticket, you will have to do this for each type of candidate.

      i. Take care in writing the correct spending limits from the table, the amounts differ for each position and whether or not you are an independent or on a ticket.

      ii. Also note that the spending limits for the Run-off Election are one-half the spending limits for the General Election.
c. Multiply the quantity by the amount for each position to determine spending limits.
i. If you are an independent, you will just multiply 1 by the corresponding spending limit of the position you are running for.
d. Place the totals from each section to the total line at the bottom of the section.

2. In the **Monetary Contribution Section**, calculate the amount of funds given to your ticket/individual campaign by:

a. TICKETS ONLY: Writing in the total amount of fees paid by each candidate on your ticket in order to participate on the ticket on the “Total Candidate Fees” line.

i. This is the sum of all of the “Total Amount of Fees Paid to Ticket Sections” of each financial sheet the individual candidates on your ticket filled out.

2. Writing the origin of each monetary contribution on the line that says “Origin(s) of Funds.”
3. Writing the amount of each monetary contribution on the line that says “Amount.”

d.

3. In the a. b. c.

d. e.

f.

4. In the a. b. c. d.

e.

Finally, total the amounts and write that number in the total box at the bottom of the section. **Donation Section**, calculate the monetary value of items given to your ticket/individual campaign by:

Writing each item donated to your campaign on the “Item(s) Contributed” line.
Writing the origin of each item donated to your ticket/individual campaign on the “Origin” line.
Writing the market value of each item donated to your ticket/individual campaign on the “Market Value” line.

i. **Please see the Election Code for rules regarding proper valuation of donated items and stipulations regarding the Election Board’s right to revalue undervalued donated items.**

ii. **For your convenience, the Election Board has recommended valuations for commonly used campaign items on file. If you drastically and unfairly undervalue your donated items, the Election Board reserves the right to revalue your donated items per the Election Code.**
Writing the quantity of each item donated to your ticket/individual campaign on the “Quantity” line. Next, multiply the market value of each item by the quantity of each item, and write each total in the “Total Value” line. Finally, total the amounts from each “Total Value” line and write that number in the total box at the bottom of the section.

**Expense Section**, calculate the total expenditures your ticket/individual campaign incurred by:
Writing each expense incurred on the “Expense(s)” line.
Writing the unit price of each item purchased on the “Unit Price” line.

Writing the quantity of each item purchased on the “Quantity” line.

Next, multiply the unit price of each item by the quantity of each item, and write each total in the “Total Price” line.
Finally, total the amounts of each “Total Price” line and write that number in the total box at the bottom of the section.

5. In the completed financial sheet.

**Required Documentation Section**, there is a checklist of documents that must accompany the

6. In the **Summary of Finances Section**, calculate whether or not your ticket/individual campaign exceeded the spending limit by:

   1. Writing the totals from the Donation Section and Expense Section into the respective boxes in the equation.
   2. Adding the Donation and Expense totals to calculate Total Expenditures.
   3. Writing the total spending limit from the Calculate Overall Ticket Spending Limit Section into the respective box.
   4. Total Expenditures should not exceed Spending Limit.

B. Instructions for filling out **FINANCIAL SHEET FOR EACH CANDIDATE ON TICKET**. This form is to be filled out by each individual candidate who is running on a ticket, and turned in with the other required documentation that organized tickets must turn in.

   1. Write the individual candidate’s name on the top of the sheet.
   2. In the **Calculate Individual Spending Limit Section**, calculate the individual candidate’s spending limit

      by:

      i. Since this sheet is for one candidate only, put the number one (1) on the “Quantity” line next to
1. Note that the President and Vice President count as one candidate and run as a pair.

   ii. Next, using the table below, write in the maximum amount the position is allowed to spend on the “Limits” line of the position you are running for.

       1. Take care in writing the correct spending limits from the table, the amounts differ for each position.

       2. Also note that the spending limits for the Run-off Election are one-half the spending limits for the General Election.

   iii. Multiply the quantity by the amount for the position you are running for to determine spending limits. (Basically, multiply 1 by the spending limit of the position)

c. In the Individual Candidate Monetary Contribution Section, calculate the monetary contribution(s) the individual candidate received independent of the ticket, which he or she used to further his or her own campaign and/or detract from the campaign of other candidates, acting independently from the organized ticket and by his or her own accord by:

   i. Writing the origin of each monetary contribution on the line that says “Origin(s) of Funds.”

   ii. Writing the amount of each monetary contribution on the line that says “Amount.”

   iii. Finally, total the amounts and write that number in the total box at the bottom of the section.

4. In the Total Amount of Fees Paid to Ticket Section, report the sum of any and all fees paid to an organized ticket in order to participate as an individual candidate on the ticket.

   i. These fees are totaled from each individual candidate financial sheet and reported on the first line of the Monetary Contribution Section of the Financial Sheet for Tickets.

   ii. This section is for reporting purposes only and is NOT to be transferred to the Summary of Finances Section.

5. In the Individual Candidate Donation Section, calculate (1) the portion and percentage of ticket donations that was applied to the individual candidate, as well as (2) the donation(s) the individual candidate received independent of the ticket, which he or she used to further his or her own campaign and/or detract from the campaign of other candidates, acting independently from the organized ticket and by his or her own accord by:

   i. Writing the total value of all donated items used by the ticket on the line that says “Total Value” next to “Total Ticket Donations.”
1. This number can be found in the total box of the Donation Section of the Financial Sheet for Tickets.

ii. Calculating the dollar amount portion of donations the ticket applied to the individual candidate and writing that number on the “Portion” line.

1. For example, if the ticket received $1,000 in donated items, had 10 candidates on the ticket, and applied the same amount to each candidate, the calculation will be:

   a. $1,000/10 = $100

iii. Calculating the percentage of ticket donations the ticket applied to the individual candidate and writing that number on the “Percentage” line.

1. Using the same example, the calculation will be:

   a. $100/$1000 = 0.1 or 10%

iv. The other lines provided are for reporting of additional donation(s) the individual candidate received independent of the ticket, which he or she used to further his or her own campaign and/or detract from the campaign of other candidates, acting independently from the organized ticket by his or her own accord.

1. Follow the same process as above, except the individual candidate will usually account for the entire dollar amount portion, as well as the entire percentage of the total value of each additional donation.

a. This may not always be the case. For example, two candidates could get together and get a donation for both of them; they would split it 50%/50%.

v. Finally, total the amounts from the “Portion” lines, and enter that number in the total box at the bottom of the section.

f. In the Individual Candidate Expense Section, calculate (1) the portion and percentage of ticket expenses that was applied to the individual candidate, as well as (2) the expense(s) the individual candidate incurred independent of the ticket, which he or she used to further his or her own campaign and/or detract from the campaign of other candidates, acting independently from the organized ticket and by his or her own accord by:

i. Writing the total price of all expenses incurred by the ticket on the line that says “Total Price” next to “Total Ticket Expenditures.”

1. This number can be found in the total box of the Expense Section of the Financial Sheet for Tickets.

ii. Calculating the dollar amount portion of expenses the ticket applied to the individual candidate and writing that number on the “Portion” line.
1. For example, if the ticket incurred $1,000 in expenses, had 10 candidates on the ticket, and applied the same amount to each candidate, the calculation will be:

   a. $1,000/10 = $100

   iii. Calculating the percentage of ticket expenses the ticket applied to the individual candidate and writing that number on the “Percentage” line.

1. Using the same example, the calculation will be:

   a. $100/$1000 = 0.1 or 10%

   iv. The other lines provided are for reporting of additional expenses(s) the individual candidate incurred independent of the ticket, which he or she used to further his or her own campaign and/or detract from the campaign of other candidates, acting independently from the organized ticket by his or her own accord.

1. Follow the same process as above, except the individual candidate will usually account for the entire dollar amount portion, as well as the entire percentage of the total price of each additional expense.

   a. This may not always be the case. For example, two candidates could get together and get a donation for both of them; they would split it 50%/50%.

   v. Finally, total the amounts from the “Portion” lines, and enter that number in the total box at the bottom of the section.

7. In the Summary of Finances Section, calculate whether or not the individual candidate exceeded his or her individual spending limit by:

   1. Writing the totals from the Individual Candidate Donation Section and the Individual Candidate Expense Section into the respective boxes in the equation.
   2. Adding the Donations and Expense totals to calculate Total Individual Candidate Expenditures.
   3. Writing the total spending limit from the Calculate Individual Candidate Spending Limit Section into the respective box.
   4. Total Candidate Expenditures should not exceed Individual Candidate Spending Limit.