

Final Checklists for Candidates

Checklist 1: Before You File

- Confirm eligibility for the office
- Talk with family and employer about time commitment
- Learn the role and responsibilities of the office
- Identify key community issues to listen for
- Review important dates with the Clerk or Secretary of State

Judicial Candidate Sidebar

Judicial candidates should also:

- Review the [Code of Judicial Conduct](#)
- Identify a treasurer early
- Understand fundraising restrictions
- Plan for strict separation from campaign finances

Checklist 2: Campaign Setup (Correct Order)

- Establish your campaign committee
- Choose a committee name
- Appoint a treasurer
- Obtain an EIN (recommended)
- Open a campaign bank account
- Register in CFIS
- File for office

 **Do not raise or spend money until all steps above are complete.**

Checklist 3: CFIS & Reporting

- Confirm CFIS login works
- Verify candidate and committee are linked
- Know your reporting schedule
- File reports on time
- File “No Activity” reports if needed
- Review reports before submission

Judicial Candidate Sidebar

- Let the treasurer handle CFIS
- Avoid reviewing donor details
- Keep distance from fundraising activity

Checklist 4: Fundraising Basics

- Understand contribution limits
- Collect required donor information
- Deposit funds promptly
- Track all expenses
- Thank donors appropriately
- Avoid cash when possible

Checklist 5: Community Outreach & Messaging

- Meet with community groups
- Listen before speaking
- Identify common themes
- Develop a clear core message
- Practice your stump speech
- Practice your elevator speech

Judicial Candidate Sidebar

- Avoid promises or issue positions
- Focus on fairness and integrity
- Keep messaging neutral and professional

Checklist 6: Campaign Materials

- Confirm disclaimer language
- Keep design simple and readable
- Order small quantities first
- Track inventory
- Follow sign placement rules
- Use local or union printers when possible

Checklist 7: Weekly Campaign Health Check

Once a week, ask:

- Are reports up to date?
- Is the treasurer supported?
- Are we listening to the community?
- Am I taking care of myself?

Adjust as needed.

Template: Simple Elevator Speech

“Hi, my name is _____. I’m running for _____ because I believe our community deserves _____.”

Template: Simple Stump Speech Outline

1. Introduction
2. Why I’m running
3. What I’ve heard from the community
4. What I care about
5. Thank you and closing

Judicial Candidate Sidebar

Judicial stump speeches should:

- Focus on experience and values
- Avoid promises or legal positions
- Emphasize fairness and respect for the law

When to Ask for Help

Ask for help if:

- You are unsure about compliance
- A report feels confusing
- A situation feels ethically unclear

Good sources include:

- Your treasurer
- The Secretary of State
- The County Clerk
- Trusted mentors
- Democratic Party of Valencia County info@valenciademocrats.org

Asking early prevents problems later.