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# Lunch and Learn: How to Get Started in Public Finance of Elections

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**MARYLAND STATE**  
**BOARD OF ELECTIONS**  
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# Welcome to Lunch and Learn

- A service provided by the MD State Board of Elections (SBE) and the Division of Candidacy and Campaign Finance (CCF) to assist candidates, their advocates and the citizens of Maryland on how to operate as a public finance (PF) candidate.
  - Twice monthly program
  - Understand the rules of PF and how they differ from a traditional / regular candidate committee.
  - Understand the mechanics of reporting your transactions into MD Campaign Reporting Information System (CRIS).

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# First Step to Becoming a Candidate

- Is NOT writing your campaign platform or a kickoff speech
- IS filing a Statement of Organization with the MD State Board of Elections (SBE)
- You can't collect money or spend money UNTIL you have a filed a Statement of Organization.

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# Initial Steps to Becoming a Candidate

- As a candidate, you need to:
  - File a Statement of Organization as a Maryland Campaign Entity with the MD SBE.
- You need to have a financial institution where you collect and disburse funds.
  - EIN from the IRS
- Eventually you will need to on the ballot. File for office.
  - Separate action at the LBE

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# How To Get Started with the SBE

- You DON'T file as a person – although you are
- You file as a Public Finance (PF) candidate committee
  - Should have first and last name of the person running
    - E.G. Friends of John Smith or Jane Smith for a Better Maryland
- The candidate committee is how you interact with the MD SBE and how you collect and spend money on your campaign.

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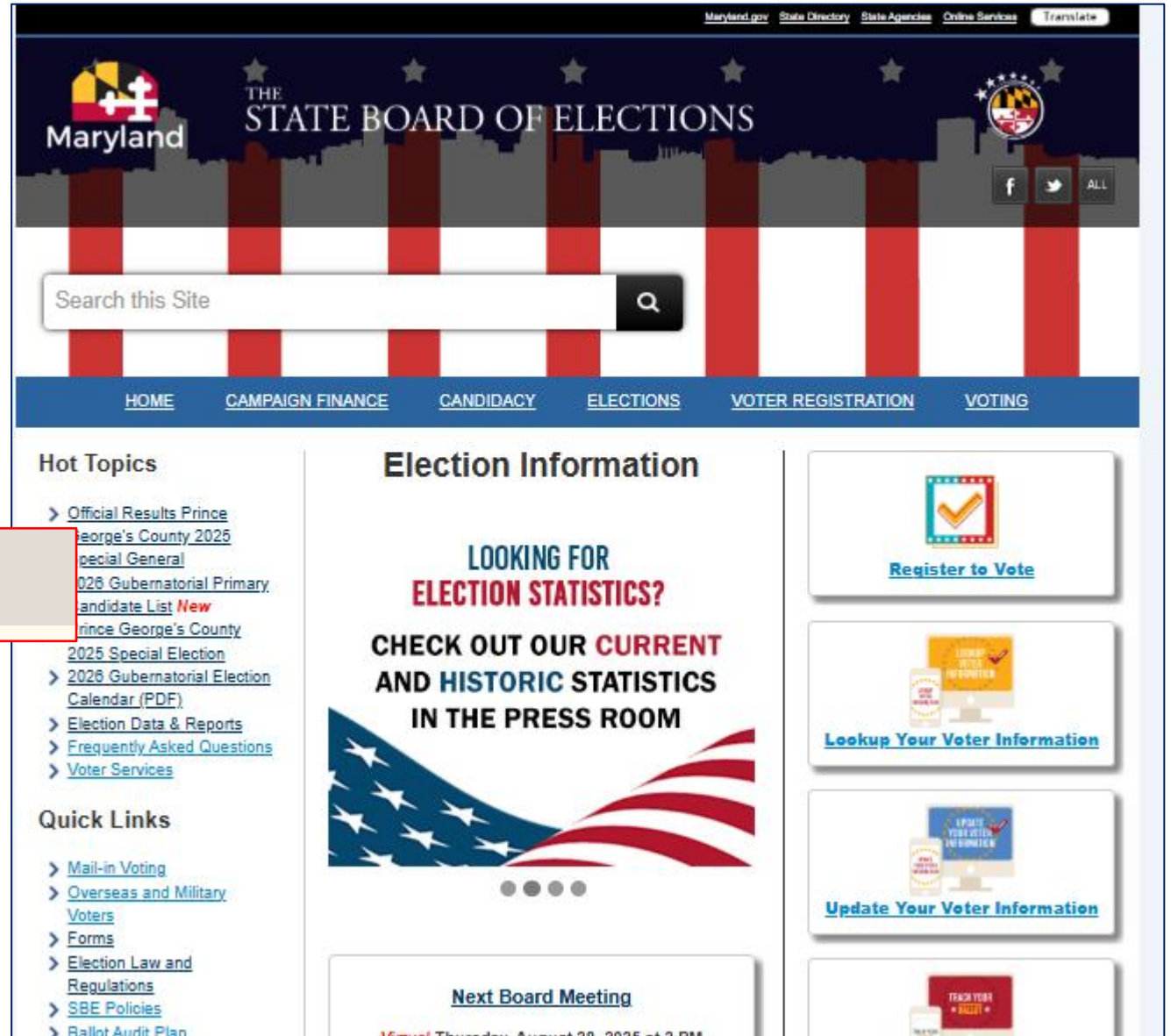
# What Must Be Included in your Statement of Organization?

- Need to identify who is heading this committee
  - Chairperson (can be the candidate);
  - Treasurer (can NOT be the candidate); and
  - Applicant candidate.
    - Their contact information (some information can be private; others public)
- The financial institution you are using (will be private)

# What You Need to Get Started

 [elections.maryland.gov/index.html](https://elections.maryland.gov/index.html)

This is the wrong location.



The screenshot shows the homepage of the Maryland State Board of Elections website. The header features the Maryland state flag, the text "THE STATE BOARD OF ELECTIONS", and a search bar. Below the header is a navigation menu with links: HOME, CAMPAIGN FINANCE, CANDIDACY, ELECTIONS, VOTER REGISTRATION, and VOTING. The main content area is divided into three columns. The left column, titled "Hot Topics", lists links for "Official Results Prince George's County 2025 Special General", "2026 Gubernatorial Primary Candidate List New", "Prince George's County 2025 Special Election", "2026 Gubernatorial Election Calendar (PDF)", "Election Data & Reports", "Frequently Asked Questions", and "Voter Services". The middle column, titled "Election Information", features a large graphic with the text "LOOKING FOR ELECTION STATISTICS? CHECK OUT OUR CURRENT AND HISTORIC STATISTICS IN THE PRESS ROOM" and an American flag. The right column contains four boxes with icons and links: "Register to Vote", "Lookup Your Voter Information", "Update Your Voter Information", and "Next Board Meeting".

# What You Need to Get Started



This is the correct location.

# What You Need to Get Started

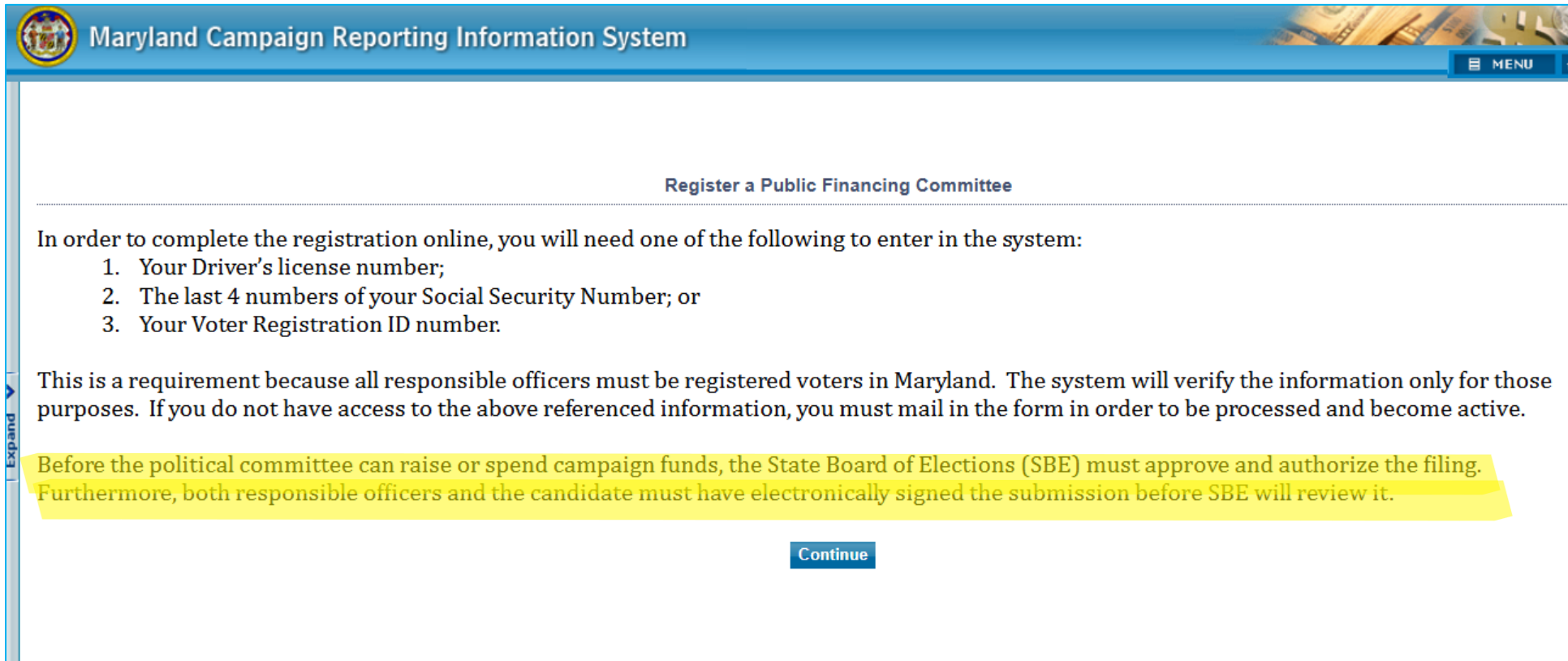


The screenshot shows a web browser at the URL [campaignfinance.maryland.gov/Home/RegisterCommittees](https://campaignfinance.maryland.gov/Home/RegisterCommittees). The page title is "Maryland Campaign Reporting Information System". Below the header, a navigation bar lists various resources. The main content area is titled "Register one of the following with State Board of Elections" and displays a grid of buttons for different committee types. The button for "Public Financing Committees" is circled in red.

Register one of the following with State Board of Elections

|                                                             |                                     |                                  |                                              |
|-------------------------------------------------------------|-------------------------------------|----------------------------------|----------------------------------------------|
| Candidate Committee                                         | Slate                               | Political Action Committee (PAC) | Super Political Action Committee (Super PAC) |
| Party Central Committee                                     | Legislative Caucus Committee        | Public Financing Committees      | Participating Organizations                  |
| Independent Expenditure Electioneering Communication Entity | Out-of-State(Non-Federal) Committee | Ballot Issue Committee           |                                              |
| Inaugural Committee                                         |                                     |                                  |                                              |

# What You Need to Get Started



The screenshot shows the 'Maryland Campaign Reporting Information System' interface. At the top, there is a blue header with the system name and a 'MENU' button. Below the header, the page title is 'Register a Public Financing Committee'. The main content area contains instructions for online registration, a list of required information, a note about voter registration, and a highlighted section about SBE approval. A 'Continue' button is at the bottom.

Maryland Campaign Reporting Information System

MENU

Register a Public Financing Committee

In order to complete the registration online, you will need one of the following to enter in the system:

1. Your Driver's license number;
2. The last 4 numbers of your Social Security Number; or
3. Your Voter Registration ID number.

This is a requirement because all responsible officers must be registered voters in Maryland. The system will verify the information only for those purposes. If you do not have access to the above referenced information, you must mail in the form in order to be processed and become active.

Before the political committee can raise or spend campaign funds, the State Board of Elections (SBE) must approve and authorize the filing. Furthermore, both responsible officers and the candidate must have electronically signed the submission before SBE will review it.

Continue

# Selecting Your Office Sought

 Maryland Campaign Reporting Information System

Public Financing Committee Registration Initial Page

Select which election you will be participating in

Election Type\* -- Select Election -- ▾

Select election year you will be running in

Election Year\* -- Select Election Year -- ▾

Select level of government the office you are seeking

Office Type\* -- Select Office Type -- ▾

Select elective office that you are seeking

Office Sought\* --Select Office Sought-- ▾

Select the jurisdiction of the office sought

Jurisdiction\* --Select Jurisdiction-- ▾

Select the political party that you are affiliated with

Party Affiliation -- Select Party -- ▾

☐ Please verify the Election and Office information before continuing

[Continue](#) [Clear](#)

151 West Street, Suite 200, Annapolis MD, 21401 Phone: 410-269-2880 Fax: 410-974-2019 Email: ccf.sbe@maryland.gov

After you fill out this page, you will be walked through four steps to register your PF candidate committee.

# Step 1 – top: officer information

Maryland Campaign Reporting Information System

CANDIDATE PUBLIC FINANCING REGISTRATION

STEP 1 STEP 2 STEP 3 STEP 4

Committee Information

| Election Type | Office Type   | Office Sought             | Jurisdiction    | Party Affiliation | Start Date |
|---------------|---------------|---------------------------|-----------------|-------------------|------------|
| Gubernatorial | County Office | County Council - District | Prince George's | Democratic        | 07/21/2025 |

Candidate Information

Last Name\*  First Name\*  Middle Name\*

Date of Birth\*  Email\*

Public Phone\*  Contact Phone\*  (for Board use) Fax\*

Residence Address

Address Line 1\*  Address Line 2\*  County of Residence\*

City\*  State\*  Zip\*

Working Address ☐ Same as Residence Address

Address Line 1\*  Address Line 2\*  Zip\*

City\*  State\*

Chairperson Information ☐ Same as Candidate

Last Name\*  First Name\*  Middle Name\*

Date of Birth\*  Email\*

Public Phone\*  Contact Phone\*  (for Board use) Fax\*

Residence Address

Address Line 1\*  Address Line 2\*  County of Residence\*

City\*  State\*  Zip\*

Working Address ☐ Same as Residence Address

Address Line 1\*  Address Line 2\*  Zip\*

City\*  State\*

Treasurer Information

Last Name\*  First Name\*  Middle Name\*

Date of Birth\*  Email\*

Public Phone\*  Contact Phone\*  (for Board use) Fax\*

Residence Address

Address Line 1\*  Address Line 2\*  County of Residence\*

City\*  State\*  Zip\*

Working Address ☐ Same as Residence Address

Address Line 1\*  Address Line 2\*  Zip\*

City\*  State\*

Additional Contacts (Optional)

Contact Role\*  Last Name\*  Email\*

Candidate can be the Chairperson but can't be the Treasurer.  
Treasurer and Chairperson must be a Registered Voter in Maryland.

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# Duties of the Chairman

The Chair does not have any specific duties under the law, but the Chair shares responsibility with the Treasurer for submitting timely campaign finance reports. This means that the Chair may be required to submit a report if the Treasurer has resigned or is absent. As a result, it is recommended that the Chair have access to the committee's books, records, and bank account.

# Duties of the Treasurer



The treasurer is responsible for the committee's financial activity and compliance with campaign finance laws.

- Receive and maintain all assets received by or on behalf of the PF cmte.;
- Disburse or expend campaign funds;
- Verify and sign all campaign finance reports;
- Provide a copy of the bank statement to the Chair and Candidate within 30 days of filing a campaign finance report;
- Keep a detailed and accurate account book on behalf of the committee;
- Preserve the account books for 10 years;
- The Chair or Treasurer must notify the State Board of a change in the residential address no later than 21 days before a campaign finance report is due.

# Step 1 – bottom: financial information

**Mailing Address** ☐ Same as Residence Address

Address Line 1\*  Address Line 2   
City\*  State\*  Zip\*  -

**Additional Contacts (Optional)**

Contact Role\*   
Last Name\*  First Name\*  Middle Name   
Email\*  Receive Notices ☐ For Public ☐  
Public Phone\*  Contact Phone\*  (for Board use) Fax

**Address**

Address Line 1\*  Address Line 2   
City\*  State\*  Zip\*  -

| Role                | Name | Mailing Address | Public Phone | Contact Phone | Email | Start Date | End Date | Receive Notices | For Public | Actions |
|---------------------|------|-----------------|--------------|---------------|-------|------------|----------|-----------------|------------|---------|
| No records to view. |      |                 |              |               |       |            |          |                 |            |         |

**Depository Information**

Name of Financial Institution\*   
Address Line 1\*  Address Line 2   
City\*  State\*  Zip\*  -   
Account Number\*  Account Type\*

| Name of Financial Institution | Address | Account Type | Account Number | Start Date | End Date | Actions |
|-------------------------------|---------|--------------|----------------|------------|----------|---------|
| No records to view.           |         |              |                |            |          |         |

Under deposit information, you will not have your account number at this time. Just put in "9999999" in the account number. Once you get your bank account open come back in MD CRIS and edit this with your actual account number. The bank account number will be private.

# Step 2 –

After filling out Step 2 you will see a screen of your information. Now is the time to double check what you entered.

The text you need to check is in **maroon / dark red**.

**Maryland Campaign Reporting Information System**

Public Financing Committee Registration Information

STEP 1 → **STEP 2** → STEP 3 → STEP 4

Committee Information  
Committee Name: **Gillogly, Kevin People for**

Election Participation (Optional)

| Election Type | Office Type   | Office Sought             | Jurisdiction | Party Affiliation | Start Date |
|---------------|---------------|---------------------------|--------------|-------------------|------------|
| Gubernatorial | County Office | County Council - At-Large | Montgomery   | Democratic        | 07/29/2025 |

Candidate Information

Last Name: **Gillogly** First Name: **Kevin** Middle Name:   
Date of Birth: 03/12/1958 EMail: **bmoorekevin@gmail.com**   
Public Phone: 410-269-2841 Contact Phone: 410-269-7896 Fax:   
Residence Address: Address Line 1: **7701 Takoma Ave** Address Line 2:   
City: **Takoma Park, MD 2091** State: **MD** County of Residence: **Montgomery** Zip: **20912**   
Mailing Address: Address Line 1: **7701 Takoma Ave** Address Line 2:   
City: **Takoma Park, MD 2091** State: **MD** Zip: **20912**   
Chairperson Information: Last Name: **Gillogly** First Name: **Kevin** Middle Name:   
Date of Birth: 03/12/1958 EMail: **bmoorekevin@gmail.com**   
Public Phone: 410-269-2841 Contact Phone: 410-269-7896 Fax:   
Residence Address: Address Line 1: **7701 Takoma Ave** Address Line 2:   
City: **Takoma Park, MD 2091** State: **MD** County of Residence: **Montgomery** Zip: **20912**   
Mailing Address: Address Line 1: **151 West St** Address Line 2: **Suite 200**   
City: **Annapolis** State: **MD** Zip: **21401**   
Treasurer Information: Last Name: **Sherbert-Parran** First Name: **Ebony** Middle Name:   
Date of Birth: 04/15/1980 EMail: **esherbert@aol.com**   
Public Phone: 301-896-3256 Contact Phone: 410-598-2365 Fax:   
Mailing Address: Address Line 1: **151 West Street** Address Line 2: **Suite 200**   
City: **Annapolis** State: **MD** Zip: **21401**   
Additional Contacts (Optional)

| Role                | Name | Mailing Address | Public Phone | Contact Phone | Email | Start Date | End Date | Receive Notices | For Public |
|---------------------|------|-----------------|--------------|---------------|-------|------------|----------|-----------------|------------|
| No records to view. |      |                 |              |               |       |            |          |                 |            |

Depository Information

| Name of Financial Institution | Address                     | Account Type | Account Number | Start Date | End Date |
|-------------------------------|-----------------------------|--------------|----------------|------------|----------|
| None                          | None, None, None, MD, 21401 | Checking     | 0000000        | 07/29/2025 |          |

Displaying page 1 of 1, records 1 to 1 of 1

< Step 1 Continue Cancel

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# Step 3

Now you need to add the SSN / Voter ID number / MD Drivers License for you and your Treasurer.

This is used for verification. It is not public.

SBE staff can't see your SSN.

 Maryland Campaign Reporting Information System

MENU HOME

Public Financing Committee Registration

STEP 1 STEP 2 STEP 3 STEP 4

**Please enter and verify yourself. If other officers are with you at this time, have them verify their information as well. If other officers are not present, an email will be sent for their verification. Then click Continue.**

**Candidate/Chairperson**

 Kevin Gillogly

Identification Type: SSN last four digits Number: 4569 (No hyphens or spaces) Verify

☒ I confirm that the above information is true and accurate

**Treasurer**

 Ebony Sherbert-Parran

Identification Type: Driver's License / MVA ID Number: 7896 (No hyphens or spaces) Verify

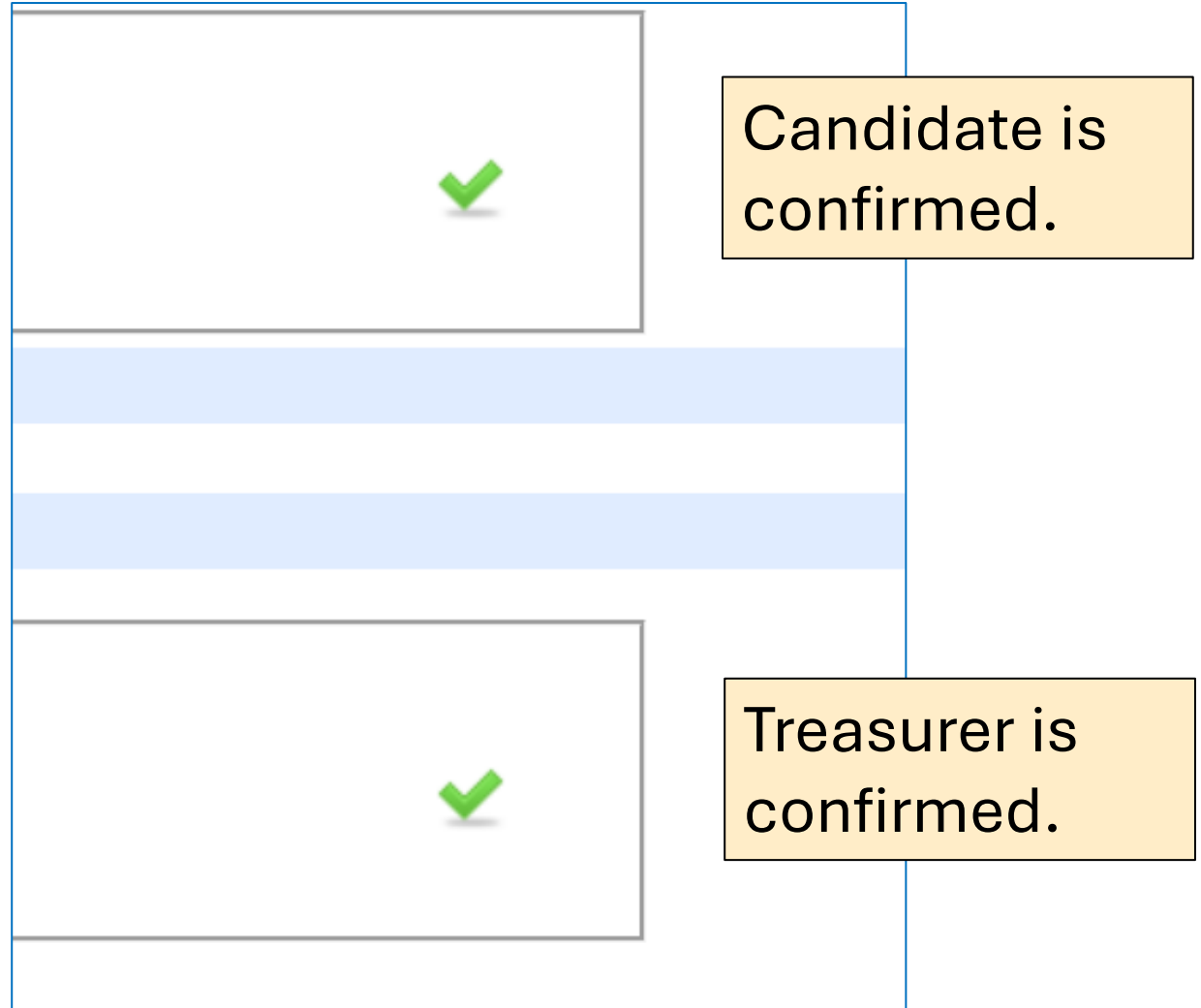
☐ I confirm that the above information is true and accurate

<- Step 2 Continue Clear Cancel

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# Step 3

After you submit your SSN or Driver's License or Voter Registration ID this constitutes your digital signature.



# Step 4

The screenshot displays the 'Maryland Campaign Reporting Information System' interface. At the top, a blue header bar contains the system name and navigation links for 'MENU' and 'HOME'. Below the header, a progress bar indicates four steps, with 'STEP 4' highlighted in blue. The main content area is titled 'Public Financing Committee Registration' and displays the message ':: Public Financing Committee Registration Complete ::'. A table titled 'Print the following Reports' lists 'Statement of Organization' with a 'View / Print' link. Below this, an 'Important Note' section contains three numbered instructions regarding registration completion, email notifications, and confirmation. A 'Back to Home' button is located at the bottom of the note section. The footer of the page provides contact information: '151 West Street, Suite 200, Annapolis MD, 21401', 'Phone: 410-269-2880', 'Fax: 410-974-2019', and 'Email: ccf.sbe@maryland.gov'.

Public Financing Committee Registration

STEP 1 STEP 2 STEP 3 STEP 4

:: Public Financing Committee Registration Complete ::

| Print the following Reports |                              |
|-----------------------------|------------------------------|
| Statement of Organization   | <a href="#">View / Print</a> |

**Important Note:**

1. Your registration is not complete until all the responsible officers provide their e-signature on step 3 of the registration process.
2. Upon activation of your registration, by admin, your Username and password will be sent to the Email address specified in this registration.
3. A confirmation of this process has been Emailed to the address specified in this registration.

[Back to Home](#)

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Almost done.

All responsible officers (Candidate, Chairperson and Treasurer) need to submit their e-signature confirming the data.

SBE will send over a temporary username and password.

# Authority Line



Each item of campaign material must include an authority line. The authority line must contain:

The name of the treasurer, and the name of the campaign finance entity.

Example: “Committee to Elect Mary Smith, John Jones, Treasurer”.

Campaign material is any material that

- 1) Contains text, graphics, and/or images; 2) Relates to a PF candidate, a prospective candidate; or 3) Is distributed or disseminated in any way.

Campaign material includes: donor cards, signs, buttons, letters, tickets, solicitations, radio and television advertisements, websites, social media accounts, bumper stickers, and paraphernalia such as pencils, hats, and t-shirts.

No material is too small. At a minimum the material needs only to contain the name and title of the treasurer. An example is “John Jones, Treas.”

# Best Practices to Get Started



- Ten-year record retention
- Regularly balancing the committee's checkbook
- Enter Contributions/Deposits as they are received
- Add additional data-entry users
- Review the Summary Guide often
- Update address, contact number, and email addresses
- Enter Expenditures as they are issued
- Create a monthly Excel Spreadsheet
- Self-report anonymous contributions

# Best Practices to Get Started, Pt II



- Remember to include credit card processing charges and bank fees on campaign reports
- Remember to add your loans from the candidate or their family as a contribution.
- Once your PF candidate committee qualifies for matching funds please make sure to include the disbursement from the county (or the state – for Governor) in CRIS.
- Reach out to CCF staff for questions

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# Questions

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# Future Lunch and Learns

- How to record transactions in MD CRIS.
- How to complete the steps to file a certificate of candidacy and submit your initial request for certified as a PF candidate.
- Trouble shooting problems

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# Staff Directory

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