



# **CANDIDATE INFORMATION BOOKLET**

## **NON-PARTISAN OFFICES**

### **PRESIDENTIAL GENERAL ELECTION NOVEMBER 3, 2020**

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**NOTICE:**

This handbook is intended to provide general information concerning the nomination and election of candidates and does not have the force and effect of law, regulation, or rule.

It is distributed with the understanding that neither the Secretary of State, the County Elections Official or their staff is rendering legal advice, and therefore, this information is not to be a substitute for legal counsel for the individual, organization, or candidate using it. As the law prohibits employees from answering questions of a legal nature, you are advised to seek legal counsel.

No duty is imposed upon the County Elections Official or their staff to determine whether a candidate meets the requirements for holding office. The Declaration of Candidacy, which each candidate must sign under penalty of perjury, states that the candidate meets the statutory and/or constitutional qualifications for office (including, but not limited to, citizenship, residency, etc.).

In the case of a conflict or amendments to law, the law, regulation, or rule that takes effect after publication of this document, the law, regulation or rule will apply.

All references contained in this guide are to the [California Elections Code](#) unless otherwise stated.

**INFORMATION EFFECTIVE JULY 14, 2020 (MAY BE SUBJECT TO CHANGE)**

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## SETTING CANDIDATE APPOINTMENT

Prospective candidates must schedule a nomination appointment during the nomination period.

**NOTE: With the practice of social distancing and reducing public exposure required due to the Coronavirus Pandemic, candidates who walk into the office without an appointment may be turned away and required to call the department and receive their documents via email.**

In order to make candidate appointments efficient for everyone, candidates **must** call the office at 805-781-5228 ahead of time to answer the following questions:

- District name\*
- Office Sought\*
- Name as Registered
- Residence Address
- Mailing Address
- Confidential Phone #
- Daytime Phone #
- Evening Phone #
- Fax #
- Email
- Website
- Name to Appear on Ballot (see pg 17)
- Ballot Designation (see pg 18)

Candidates will then be emailed a packet of forms to be completed and presented at their first appointment.

\*Candidates for a Non-Partisan office need to provide evidence of meeting the qualifications for the office being applied for.

# IMPORTANT DATES FOR CANDIDATES

## November 3, 2020 Presidential General Election

<u>DATE</u>	<u>EVENT</u>
<b>April 24 - Aug 7</b> E-193 to E-88	Independent Presidential Elector Candidates Nomination Period. EC 8403(a)(2)
<b>May 18 to Aug 31</b> E-169 to E-64	Independent Presidential Elector Candidates Nomination Papers forwarded to Secretary of State. Cal. Code Regs., tit. 2, § 20090; § 8403(b)
<b>Jul 13 to Aug 7</b> E-113 to E-88	Nomination Period. Incumbents must file by Aug 10th at 5:00PM. EC §8070, §8082. <b>Please call the Elections Division at 805-781-5228 to make an appointment.</b>
<b>Jul 28, 2020</b> E-98	Last day to change candidate designation on ballot for <u>Legislative and Congressional</u> candidates.
<b>July 31</b>	Semi Annual Campaign Statement Filing Deadline Gov Code §84200, §84218 (* thru 06/30/20)
<b>Aug 8 to Aug 12</b> E-87 to E-83	Extension of Nomination Period (Non-Incumbents Only) EC§8022, §8024. <b>Does not apply where there is no incumbent due to vacancy or term limits.</b>
<b>Aug 10</b>	Last day to withdraw Candidate Statement of Qualifications by 5:00PM for contests closing Aug 7th. EC §13307(a)(3)
<b>Aug 13</b>	Random Alphabet Drawing EC §13112
<b>Aug 13</b>	Last Day to withdraw Candidate Statement of Qualifications by 5:00PM for races closing Aug 7th. EC §13307(a)(3)
<b>Sept 7- Oct 20</b>	Write-In Candidate Period EC §8601
<b>Sept 24</b>	1 <sup>st</sup> Pre-Election Campaign Statement Due (Gov Code §84200.5, §84200.7(a)) (7/1/20-9/19/20)
<b>Oct 5</b> E-29	29 Day Close of Registration - First day Vote by Mail Ballots are available - Last day to register to vote in order to receive a Sample Ballot & State Voter Information Guide EC §3001, §3003 (E-29)
<b>Oct 19</b> E-15	15 Day Close of Registration - Voters registering between Oct 10th & 24th will receive notification of their polling place, but will not receive any other voter information. (EC §2102, 2107) (E-15)
<b>Oct 22</b> E-12	2 <sup>nd</sup> Pre-Election Campaign Statement Due (Gov Code §84200.5, §84200.7(a)) (9/20/20-10/17/20)
<b>Oct 27</b> E-7	Last day for Elections Office <b>to mail</b> Vote-by-Mail Ballots to voters. EC §3001
<b>Nov 3 2020</b>	<b>Election Day. Polls open 7:00AM-8:00PM</b>

<b>Dec 3, 2020</b>	Complete Official Canvass
<b>Jan 31, 2021</b>	Semi-Annual Campaign Statement Due

\*The period covered by any statement begins on the day after the closing date of the last statement filed or January 1, if no previous statement has been filed. If a filing deadline falls on a weekend or a holiday, it is moved to the next business day.

**NOTE: Due to the Coronavirus Pandemic, some typical elections dates may shift to accommodate for the health and safety of the public, voters, pollworkers, and county staff. This may include, but not be limited to, the exact date that VBM ballots are sent, extension of the close of registration, the last day VBM ballots can be sent and received, and in person voting locations.**

## **TERMS, QUALIFICATIONS, FILING FEES & SIGNATURE REQUIREMENTS**

<p>GENERAL QUALIFICATIONS</p> <p>EC §13.5, §20 &amp; §201</p> <p>COUNTY OFFICES</p> <p>Gov Code §24001</p>	<p>The California Elections Code requires all candidates for public office to be registered voters and otherwise qualified to vote for the office they are seeking at the time their nomination papers are issued, unless specified differently below.</p> <p>In addition, a person cannot be considered a candidate for, and is not eligible to be elected to, any state or local elective office if the person has been convicted of a felony involving accepting or giving, or offering to give, any bribe, the embezzlement of public money, extortion or theft of public money, perjury or conspiracy to commit any of these crimes.</p> <p>Beyond these general qualifications, some offices require more specific qualifications, and proof that candidates meet these qualifications</p>
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# OFFICES TO BE FILLED

## VOTER-NOMINATED OFFICES

Office	Term	Term Begins	Incumbent (Party Preference)	Qualifications
<b>FEDERAL</b>				
United States Representative in Congress, 24th District	2 Years	1/3/21 12:00PM	Salud Carbajal (Democratic)	At least 25 years of age; registered voter; U.S. citizen for at least 7 years; resident of the state when elected.
<b>STATE</b>				
State Senator 17 <sup>th</sup> Senate District	4 Years	12/7/20	Bill Monning * (Democratic)	U.S. citizen; registered voter in the district at the time nomination papers are issued; may not serve for more than two terms.
Member of the Assembly, 35th District	2 Years	12/7/20	Jordan Cunningham (Republican)	U.S. citizen; resident of California; registered voter in the district at the time nomination papers are issued; may not serve more than 12 years in the Senate, the Assembly, or both, in any combination of terms.

\* Denotes Incumbent who may not seek re-election due to term limits.

### FEDERAL AND STATE SUBDIVISION OVERLAP

Below are the Districts that overlap to multiple counties.

District	County Overlap
24 <sup>th</sup> Congressional	Santa Barbara, Ventura
17 <sup>th</sup> State Senate	Santa Cruz, Monterey, Santa Clara
35 <sup>th</sup> State Assembly	Santa Barbara
37 <sup>th</sup> State Assembly	Santa Barbara, Ventura

## JUDICIAL CANDIDATE NAME ON BALLOT EC §8203

If a petition indicating that a write-in campaign will be conducted for the office at the general election, signed by at least 0.1 percent of the registered voters qualified to vote with respect to the office, is filed with the elections official not less than 83 days before the general election, the name of the incumbent shall be placed on the general election ballot if it has not appeared on the direct primary election ballot.

If, in conformity with this section, the name of the incumbent does not appear either on the primary ballot or general election ballot, the elections official, on the day of the general election, shall declare the incumbent reelected. Certificates of election specified in Section 15401 or 15504 shall not be issued to a person reelected pursuant to this section before the day of the general election.

<b>SUPERIOR COURT</b>				
<b>Office</b>	<b>Term</b>	<b>Term Begins</b>	<b>Incumbent</b>	<b>Qualifications</b>
Superior Court Judge	6 Years	01/07/19	<p><b>Office No. 3</b> Rita Federman</p> <p><b>Office No. 5</b> Ginger E. Garrett</p> <p><b>Office No. 11</b> Matthew G. Guerrero</p>	U.S. citizen; registered voter; member of the State Bar for 10 years or served as a Judge of a California Court of Record for 10 years immediately preceding the election.

<b>SCHOOL BOARD/DISTRICT (Education Code §5000)</b>					
<b>District</b>	<b>Trustee Area</b>	<b>Positions</b>	<b>Incumbent(s)</b>	<b>Term Begins</b>	<b>Term Ends</b>
San Luis Obispo County Board of Education	TA #1	1 Full Term	Diane A. Ward	12/04/20	12/06/24
	TA #3	1 Full Term	Joel K. Peterson	12/04/20	12/06/24
Santa Barbara County Education Office	TA #4	1 Full Term	Roberta Heter	12/04/20	12/06/24
SLO County Community College District (Cuesta College)	TA #1	1 Full Term	Angela R. Mitchell	12/04/20	12/06/24
	TA #2	1 Full Term	Barbara H. George	12/04/20	12/06/24
	TA #5	1 Full Term	Mary T. Strobridge	12/04/20	12/06/24



Allan Hancock Joint Community College District	TA #2	1 Full Term	Daniel T. Hilker	12/04/20	12/06/24
Atascadero Unified School District		3 Full Terms	Corinne C. Kuhnle Terri E. Switzer Mary K. Mills	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Coast Unified School District		3 Full Terms	Tiffany S. Silva Samuel Shalhoub Gary Stephenson	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
		1 Short Term	Jack Mettier	12/4/20	12/02/22
Cuyama Joint Unified School District		3 Full Terms	Jose Valenzuela Michael Mann Trudi Callaway	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Lucia Mar Unified School District	TA #2	1 Full Term	Vicki Meagher	12/04/20	12/06/24
	TA #4	2 Full Terms	Don Stewart Dee Santos	12/04/20 12/04/20	12/06/24 12/06/24
Paso Robles Joint Unified School District		4 Full Terms	J. Christopher Bausch Joel C. Peterson Joan M. Summers Stephanie A. Ulibarri	12/04/20 12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24 12/06/24
San Luis Coastal Unified School District	TA #1	2 Full Terms	Walter J. Millar Kathryn Eisendrath Rogers	12/04/20 12/04/20	12/06/24 12/06/24
	TA #2	1 Full Terms	Christopher D. Ungar	12/04/20	12/06/24
San Miguel Joint Union School District		2 Full Terms	Janice Lynch Michael J. Sanders	12/04/20 12/04/20	12/06/24 12/06/24
Santa Maria Bonita School District		3 Full Terms	Joann "Jody" Oliver Linda Cordero John Hollinshead	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Shandon Joint Unified School District	TA #1	1 Full Term	Marlene Thomason	12/04/20	12/06/24
	TA#2	1 Full Term	Flint Speer	12/04/20	12/06/24
Templeton Unified School District		3 Full Terms	Nelson Yamagata Theodore R. Dubost Brenda L. Gray	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24

Santa Maria Joint Union High School District		2 Full Terms	Amy Lopez Jack C. Garvin	12/04/20 12/04/20	12/06/24 12/06/24
Cayucos Elementary School District		2 Full Terms	Susan H. Brownell Val W. Wright	12/04/20 12/04/20	12/06/24 12/06/24
Pleasant Valley Joint Union Elementary School District		2 Full Terms	Julie Kirby Dora K. Denning	12/04/20 12/04/20	12/06/24 12/06/24

### **COMMUNITY SERVICES DISTRICT (Government Code §61042)**

<b>District</b>	<b>Positions</b>	<b>Incumbent(s)</b>	<b>Term Begins</b>	<b>Term Ends</b>
Avila Beach Community Services District	2 Full Terms	Howard L. Kennett Kristin D. Berry	12/04/20 12/04/20	12/06/24 12/06/24
California Valley Community Services District	3 Full Terms	Roberta A. Petersen Ruth J. Legaspi Gerald L. Johnson	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Cambria Community Services District	3 Full Term	Amanda C. Rice Harry N. Farmer David A. Pierson	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Ground Squirrel Hollow Community Services District	3 Full Terms	Kevin S. McCamy Scott C. Simons Frank A. Duckworth	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Heritage Ranch Community Services District	2 Full Terms	Daniel W. Burgess Devin R. Capps	12/04/20 12/04/20	12/06/24 12/06/24
Independence Ranch Community Services District	3 Full Terms	Carol C. Noe Terry D. Leezer Danny Meehan	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
	1 Short Term	Mark Kenyon	12/04/20	12/02/22
Linne Community Services District	2 Full Terms	Brian J. Stack Deborah A. Nottenkamper	12/04/20 12/04/20	12/06/24 12/06/24
Los Osos Community Services District	2 Full Terms	Marshall E. Ochylski Vicki L. Milledge	12/04/20 12/04/20	12/06/24 12/06/24
	1 Short Term	Christine M. Womack	12/4/20	12/02/22
Nipomo Community Services	2 Full Terms	Craig W. Armstrong Robert L. Blair	12/04/20 12/04/20	12/06/24 12/06/24

District				
Oceano Community Services District	3 Full Terms	Linda M. Austin Shirley D. Gibson Cynthia Replogle	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
San Miguel Community Services District	3 Full Terms	John R. Green Jr. Anthony R. Kalvans Raynette Gregory	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
San Simeon Community Services District	3 Full Terms	William J. Carson Gwendoline E. Kellas Daniel De La Rosa	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
	1 Short Term	William Maurer	12/4/20	12/02/22
Squire Canyon Community Services District	3 Full Terms	Stephen W. Fiant Christopher W. Johnson Mike Nunno	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24
Templeton Community Services District	3 Full Terms	Navid Fardanesh Pamela M. Jardini Debra J. Logan	12/04/20 12/04/20 12/04/20	12/06/24 12/06/24 12/06/24

### **SPECIAL DISTRICTS (Government Code §61042)**

<b>District</b>	<b>Positions</b>	<b>Incumbent(s)</b>	<b>Term Begins</b>	<b>Term Ends</b>
Port San Luis Harbor District <b>HNC §6050</b>	3 Full Terms	James B. Blecha William R. Barrow Robert S. Vessely	1/04/21 1/04/21 1/04/21	1/06/25 1/06/25 1/06/25
Santa Margarita Fire Protection District	1 Full Term	John O. Wilkins	12/04/20	12/06/24
Cambria Community Healthcare District	2 Full Terms	Barbra Bronson Gray Cecilia Montalvo	12/04/20 12/04/20	12/06/24 12/06/24
Cayucos Sanitary District	2 Full Terms	Robert B. Enns Hannah P. Miller	12/04/20 12/04/20	12/06/24 12/06/24
Garden Farms Community Water District	2 Full Terms	John E. Billings John L. Pinson	12/04/20 12/04/20	12/06/24 12/06/24
Santa Maria Valley Water Conservation District Division No. 3	<b>TA #3 not up until 2022</b>			

## CITY OFFICES

City candidates file with the appropriate Elections Official within their respective City.

CITY	TERMS UP
Arroyo Grande	1 Mayor 2 Council Members
Atascadero	1 Mayor 2 Council Members 1 City Treasurer
Grover Beach	1 Mayor 2 Council Members
Paso Robles	1 City Treasurer 2 Council Members
Morro Bay	1 Mayor 2 Council Members
Pismo Beach	1 Mayor 2 Council Members
San Luis Obispo	1 Mayor 2 Council Members

## SPECIFIC QUALIFICATIONS

### COMMUNITY SERVICES DISTRICTS

Shall be a Registered Elector residing within the District.

### FIRE PROTECTION DISTRICTS

Shall be a Registered Voter of the District.

### HARBOR DISTRICTS

Shall be a Registered Voter of the District and shall secure a nomination paper signed by not less than 25 but not more than 50 registered voters of the District. Upon taking the Oath of Office shall file a \$5000 bond with the elections official, subject to the approval of the Board of Supervisors.

### HEALTH CARE DISTRICTS

Shall be a Registered Voter residing in the District.

### SANITARY DISTRICTS

Shall be a Resident Elector of the District.

### **SCHOOL DISTRICTS**

Shall be a Registered Voter and Resident of the District and Trustee Area (if applicable). An employee of a school district may not be sworn into office as an elected or appointed member of the district's governing board unless and until he/she resigns as an employee.

### **COMMUNITY COLLEGE DISTRICTS**

Shall be a Registered Voter and Resident of the District and Trustee Area. An employee of a community college district may not be sworn into office as an elected or appointed member of the district's governing board unless and until he/she resigns as an employee. No member of the governing board shall during the term for which he/she was elected, be eligible to serve on the governing board of a high school district whose boundaries are coterminous with those of the college district.

### **BOARD OF EDUCATION CANDIDATES**

Shall be a Registered Voter and Resident of the Trustee Area. The County Superintendent of Schools, and member of his/her staff, or any employee of a school district is not eligible to be a member of the County Board of Education.

## FREQUENTLY ASKED QUESTIONS

### **Q: MAY I FILE FOR MORE THAN ONE OFFICE AT THE SAME ELECTION?**

A: Yes, with exceptions:

1. **School District Elections** - Elections Code §10603(c)(d) prohibits a person from filing nomination papers for more than one district office, including a county board of education office, at the same election. Except, if there is a proposal to form a unified school district on the same ballot as the election of governing board members of that district, any candidate for a position on the existing governing board may also file nomination papers for a position on the governing board for the proposed district.
2. **District Offices** - Elections Code §10510(b) prohibits a person from filing nomination papers for more than one district office or term of office for the same district at the same election.

### **Q: IF I AM ELECTED, MAY I HOLD MORE THAN ONE OFFICE AT THE SAME TIME?**

A: This is a legal question which the County Clerk-Recorder cannot answer. The County Clerk-Recorder cannot refuse to issue nomination papers unless it is prohibited as stated in the first question above. A person's legal right to hold more than one office at the same time is governed by common law doctrine of incompatible offices. Government Code §1099 was added January 1, 2006 to codify this common law rule. This new section states: a) that an officer shall not simultaneously hold two public offices that are incompatible, as defined, and 2) when two public offices are incompatible, a public officer shall be deemed to have forfeited the first office upon acceding to the second.

There are numerous court cases and attorney general opinions which address specific situations of incompatible offices. There is a list of case cites and copies of several of the opinions in the County Clerk-Recorder's Office that you may request; however, this is not an exhaustive list of all available information and you are advised to seek legal counsel to determine the incompatibility of the offices.

# CANDIDATE FILING REQUIREMENTS

## DECLARATION OF CANDIDACY AND NOMINATION PAPERS

EC §8020, §8028, §8040, §8041, §8060, §8105

All candidates for offices at the primary election must file a Declaration of Candidacy and Nomination Papers with the elections official. Candidates may file a Declaration of Candidacy for only one office. If the candidate is out of the county during the Declaration of Candidacy period and is not able to be present in the elections official's office, the candidate may, in a written statement signed and dated by the candidate, designate a person to pick up the Declaration of Candidacy form and deliver it to the candidate. The statement shall include language explaining that the candidate is aware that the Declaration of Candidacy must be properly executed and delivered to the elections official in the county of the candidate's residence no later than **5:00 p.m., on the last day to file. Please refer to calendar for dates.**

Circulators of Nomination Papers shall be voters in the district or political subdivision in which the candidate is to be voted upon and shall complete the Affidavit of Circulator in their own hand. A nomination paper will not be accepted for filing unless the Affidavit of Circulator section is completed.

No more signers shall be secured for any candidate than the maximum number allowed. The nomination paper shall be filed with the elections official of the county in which the signers reside and are registered voters.

If the incumbent of the office does not file by the last day to file (check the calendar), the filing period will be extended 5 calendar days, for any person **other than the incumbent** to file nomination documents. There shall be no extension of the filing period if the incumbent has already served the maximum number of terms permitted for that office or if there is a vacancy in the office.

## WRITE-IN CANDIDATES

EC §8600-8605

**File between the dates of September 7, 2020 and October 20, 2020.**

There is no filing fee to be a write-in candidate. To be a write-in candidate, a person must file a Statement of Write-In Candidacy and Nomination Papers with the requisite number of signatures as required for the office. Signers on the nomination papers shall be voters in the district or political subdivision in which the candidate is to be voted on.

## **INSUFFICIENT NOMINEES/APPOINTMENT OF CANDIDATES**

In the event there are insufficient candidates, the elections official shall submit a certificate of these facts to the County Board of Supervisors and request that the Board of Supervisors appoint in lieu of an election to the office or offices the person or persons, if any, who have filed declarations of candidacy. If no person has filed a declaration of candidacy for any office, the Board of Supervisors shall appoint any person to the office who is qualified on the date when the election would have been held. The person appointed shall qualify and take office and serve as if elected at the formation election.

However, if a school and/or special district election is not held pursuant to Education Code §5326 and Elections Code §10515 and a petition requesting an election signed by 10 percent of the voters or 50 voters, whichever is less, requesting that a district election be held for the offices has not been received by the elections official, the qualified person or persons nominated shall be seated at the organizational meeting of the board. If no person is nominated or if an insufficient number is nominated, the governing board of the district shall appoint a qualified person or persons at a meeting prior to the day fixed for the election. Such appointees shall be seated at the organizational meeting of the board as if elected at a district election.



# **BALLOT NAMES AND DESIGNATIONS**

## **NAME ON BALLOT**

The candidate indicates on the Declaration of Candidacy how his/her name should appear on the ballot. This notation should be recognizable as the name under which the candidate is registered, though the two need not be identical. (Example: A candidate registered as "Jonathan William Smith" may use such variations as "John W. Smith", "John Smith", or "J. William (Bud) Smith".)

No title or degree may appear on the same line on a ballot as a candidate's name. EC §13106

## **RULES FOR PRINTING CANDIDATE'S NAME ON BALLOTS**

Names of candidates shall be printed on the ballot in accordance with the following rules:

### **Local Candidates**

1. If the office is to be voted upon wholly within, but not throughout, one county, as in the case of Municipal, District, County Supervisor, and County Central Committee offices, the official responsible for conducting the election shall determine the order of names in accordance with the randomized alphabet as provided for in EC §13111(f), §13112
2. If the office is to be voted on throughout a single county and there are not more than four Assembly Districts wholly or partly in the county, the County Elections Official shall determine the order of names in accordance with the randomized alphabet as provided for in EC §13112 for the 1st Supervisorial District. Thereafter, for each succeeding Supervisorial District, the name appearing first for each office in the last preceding Supervisorial District shall be placed last and the order of the other names will remain unchanged. EC §13111(g)

## **RANDOMIZED ALPHABET DRAWING**

For each election, the Secretary of State shall conduct a drawing of the letters of the alphabet pursuant to the procedures set forth in EC §13112. For the General election, this drawing will be conducted on August 16, 2018. The result of this drawing shall be known as the randomized alphabet and will be used to determine the order of candidates as specified above.

**BALLOT DESIGNATION**

The ballot designation is the word or group of words that will appear on the ballot under the candidate’s name, designating the principal profession, vocation, or occupation of the candidate. Acceptable ballot designations are governed by EC §13107 and Secretary of State Regulations. All candidates may choose a ballot designation to appear immediately under their name on the ballot. EC §13107, CA Code of Regulations §20710-20719

**BALLOT DESIGNATION WORKSHEET**

A Ballot Designation Worksheet must be completed and filed with the elections official **at the same time** the candidate files his/her Declaration of Candidacy. The statute mandates that no designation will appear under the candidate’s name on the ballot if the candidate fails to file the required worksheet. EC §13107.3

**The ballot designation must be chosen from one of the four categories below:**

**(1) ELECTIVE OFFICE**

EC §13107(a)(1), SOS Reg. §20712.

Words designating the elective city, county, district, state, or federal office which the candidate holds at the time of filing the nomination documents to which he/she was elected by vote of the people.

**Example 1:** An acceptable ballot designation for an assembly representative from the 33rd Assembly District, would be “Member of the Assembly, 33rd District.”

**Example 2:** For local offices, a candidate who is currently in office as mayor may use the designation “Mayor, City of San Luis Obispo.”

**Example 3:** Proposed ballot designations indicating a position of legislative leadership or leadership in another elected body, such as “Majority Leader of the California Senate,” Speaker of the California State Assembly,” or City of San Luis Obispo Mayor Pro Tem are not elective offices and therefore not allowed. However, they may, subject to the three-word limit, be considered as an occupation – see (4) below.

**(2) INCUMBENT**

EC §13107(a)(2), SOS Reg. §20713

The word “Incumbent” may be used if the candidate is a candidate for the same office which he/she holds at the time of filing the nomination papers, and was elected to that

office by a vote of the people, or, in the case of a superior or municipal court judge, was appointed to that office.

- The term “Incumbent” must be used as a noun. It shall not be used in conjunction with any other words, including any accompanying adjectives or modifiers. For example, “Incumbent Assembly Member, 33rd Assembly District” or “Incumbent City Councilmember” would be impermissible designations.
- Incumbent cannot be combined with any other designation and must stand alone. For example: Incumbent/Rancher is not permissible.

### **(3) APPOINTED INCUMBENT**

EC §13107(a)(4), SOS Reg. §20715

The phrase “Appointed Incumbent” may be used if the candidate holds an office other than a judicial office by virtue of appointment, and the candidate is a candidate for election to the same office, or, if the candidate is a candidate for election to the same office or to some other office, the word “Appointed” and the title of the office. In either instance, the candidate may not use the unmodified word “Incumbent” or any words designating the office unmodified by the word “Appointed.”

- If an incumbent was appointed in lieu of an election because the number of candidates did not exceed the number required to be elected at the last election for that office, the candidate is not required to use “appointed”.

### **(4) 3-WORD PROFESSION/OCCUPATION/VOCATION**

EC §13107 (a)(3)., SOS Reg. §20714

No more than three words designating either the current principal professions, vocations, and/or occupations of the candidate, or the principal professions, vocations, and/or occupations of the candidate during the calendar year immediately preceding the filing of nomination documents.

Definitions of some of the above terms as they are used in EC §13107(a)(3), are defined as follows:

**“Profession”** means a field of employment requiring special education or skill and requiring knowledge of a particular discipline. Examples of an acceptable designation of a “profession,” as defined in this subdivision, include, but are not limited to, “attorney,” “physician,” “accountant,” “architect,” and “teacher.”

**“Occupation”** means the employment in which one regularly engages or follows as

the means of making a livelihood. Examples of an acceptable designation of an "occupation," as defined in this subdivision include, but are not limited to, "rancher," "restaurateur," "retail salesperson," "manual laborer," "construction worker," "computer manufacturing executive," "military pilot," "secretary," and "police officer."

**"Vocation"** means a trade, a religious calling, or the work upon which a person, in most but not all cases, relies for his or her livelihood and spends a major portion of his or her time. Examples of an acceptable designation of a "vocation," as defined in this subdivision include, but are not limited to, "minister," "priest," "mother," "father," "parent", "homemaker," "dependent care provider," "carpenter," "plumber," "electrician," and "cabinetmaker."

**"Principal"** as that term is used in this subdivision, means a substantial involvement of time and effort such that the activity is one of the primary, main or leading professional, vocational or occupational endeavors of the candidate. Involvement that is only nominal, pro forma, or titular in character does not meet the requirements of the statute.

- If a candidate holds a current and active license from the State of California to engage in a profession, vocation or occupation, the candidate is entitled to consider it one of his/her **"principal"** professions, vocations or occupations.
- A candidate may not claim such profession, vocation or occupation as one of his or her **"principal"** professions, vocations or occupations if (i) the candidate's licensure status is "inactive" at the time the candidate files his or her nomination document, or (ii) the candidate's license has been suspended or revoked by the agency issuing the license at the time the candidate files his or her nomination documents.
- A candidate may designate **multiple principal professions**, vocations and/or occupations. If more than one profession, vocation or occupation is listed, it shall be separated by a slash ("/"). **Example:** An Assembly representative who happens to be a lawyer and rancher can use the designation "Legislator/Lawyer/Rancher".
- If a candidate proposes a ballot designation including multiple principal professions, vocations or occupations, the proposed ballot designation must comply with the following: Each such proposed profession, vocation or occupation must independently qualify as a **"principal"** profession, vocation or

occupation, as that term is defined above.

**“Community Volunteer”** means a person who engages in an activity or performs a service for or on behalf of, without profiting monetarily, one of more of the following:

1. A charitable, educational, or religious organization as defined by the United States Internal Revenue Code §501(c)(3);
2. A governmental agency; or
3. An educational institution.

The activity or service must constitute substantial involvement of the candidate’s time and effort such that the activity or service is the sole, primary, main or leading professional, vocational or occupational endeavor of the candidate, who is not engaged concurrently in another principal profession, vocation or occupation. Community Volunteer cannot be used in conjunction with any other Profession, Occupation or Vocation.

#### **OTHER RULES**

- The proposed ballot designation shall be grammatically correct, generic, and all words must be spelled correctly.
- Hyphenated words that appear in any generally available standard reference dictionary, published in the United States at any time within the 10 calendar years immediately preceding the election for which the words are counted, shall be considered as one word. Each part of all other hyphenated words shall be counted as a separate word.
- Punctuation shall be limited to the use of a comma (e.g., District Attorney, San Luis Obispo County) and a slash (e.g., Legislator/Rancher/Physician). A hyphen may be used if, and only if, the use of a hyphen is called for in the spelling of a word as it appears in a standard reference dictionary of the English language published in the ten calendar years preceding the election.
- All California geographical names shall be considered to be one word and shall be limited to the names of cities, counties and states. The names of special districts and political subdivisions are not “geographical names.” If the candidate desires, the geographical name may be used in the form of “City of.....” “County of.....,” or “....County.”
- An acronym shall be counted as one word.

- A ballot designation may not comprise or include commercial identification information such as a trademark, service mark, trade name, or the specific name of a business, partnership, corporation, company, foundation, or organization.
- Examples of an improper use of commercial identification information include, but are not limited to, "Acme Company President," "Smith Foundation Director," and "UCLA Professor."
- A candidate who does not want a ballot designation should indicate this in the space provided for ballot designation on the Declaration of Candidacy, by writing "NONE".

### **DESIGNATIONS NOT ACCEPTED**

Neither the Secretary of State nor any other election official shall accept a designation of which any of the following would be true:

- It would **mislead** the voter.
- It would **suggest an evaluation** of a candidate: A laudatory adjective that would suggest an evaluation of the candidate's qualifications shall not be permitted. Examples of ballot designations usually considered to suggest an evaluation of a candidate, may include but are not limited to, "outstanding", "leading", "expert", "virtuous", "eminent", "senior," "emeritus," "specialist," "magnate," "best," "famous," "respected," "honest," and "prominent," .
- It would suggest a **Status**: A status is a state, condition, social position or legal relation of the candidate to another person, persons, or the community as a whole. Examples of a status include, but are not limited to, "veteran," "proponent," "reformer," "scholar," "founder," "philosopher," "philanthropist," "activist," "taxpayer," "husband," "wife," "patriot", "citizen", "appointee" and "advocate."
- It abbreviates the word "**retired**" or places it following any word or words that it modifies.
  - o Examples "Ret. Army General," "Navy Admiral, Retired" and "City Attorney, Retired." are not permissible
  - o Generally, a **retired** status may be allowed if the candidate can

demonstrate retirement. The following are examples of evidence supporting retired status:

- Served in the position being requested to be listed as retired from for more than 5 years;
  - Is collecting or eligible to collect retirement benefits/pension;
  - Is 55 or more years old;
  - Left the position voluntarily after serving a minimum of 5 years;
  - If requesting the use of a retired public office designation, was not recalled from or did not fail to win that office or surrender it to run for another office in a previous election campaign;
  - Has not had another more recent occupation;
  - Retirement benefits are providing a principal source of income.
- It uses a word or prefix, such as “former” or “ex-,” which means a **prior status**. The only exception is the use of the word “retired.”
    - o Examples: “Former Congressman,” “Ex-Senator,” and “Former Educator” are not permissible
  - Retired cannot be used in conjunction with another principal profession, occupation or vocation.
    - o Example: Retired Educator/Salesperson is not permissible.
  - It uses the name of any **political party**, whether or not it has qualified for the ballot.
    - o Example: “Democratic Party Chair”, “Republican Central Committeemember”, and “Socialist” are not permissible.
  - It uses a word or words referring to a **racial, religious, or ethnic** group.
    - o Examples: “Indian Sculptor,” “Latino Notary,” “African-American Firefighter,” “Christian Physician,” and “Caucasian Policeman” are not permissible.
    - o If the candidate is a member of the clergy, the candidate may not make reference to his or her specific denomination. However, the candidate may use his or her clerical title as a ballot designation: for example, “Rabbi,” “Pastor,” “Minister,” “Priest,” “Bishop,” “Deacon,” “Monk,” and “Nun.”
  - It refers to any activity **prohibited by law**.

## **DESIGNATION REJECTED**

If upon checking the ballot designation worksheet and accompanying nomination documents, the election official finds the designation to be in violation of any of the restrictions set forth in this section, the candidate shall be notified by registered or certified mail, return receipt requested, addressed to the mailing address appearing on the candidate's nomination documents.

**It is important for the candidate to include a correct telephone number, facsimile number (if available) email, and mailing address on the ballot designation worksheet in order to expedite communication in the event the ballot designation is rejected.**

1. The candidate shall, within three days from the date of receipt of the notice, appear before the election officer or, in the case of the Secretary of State, notify the Secretary of State by telephone, and provide an alternate designation.
2. In the event the candidate fails to provide an alternate designation, no designation shall appear after the candidate's name.

## **FORMAT, CHANGES, ETC.**

1. No designation given by a candidate shall be changed by the candidate after the final date for filing nomination documents, except as specifically requested by the election official.
2. The designation shall remain the same for all purposes of both Primary and General Election, unless the candidate, at least 98 days prior to the General Election, requests in writing a different designation which the candidate is entitled to use at the time of the request.
3. In all cases, words shall be printed on the ballot in 8-point Roman uppercase and lowercase type **except** that, if the designation selected is so long that it would conflict with the space requirements of EC §13207 and §13211, the election official shall use a type size for the designation for each candidate for that office sufficiently smaller to meet these requirements.





**California Secretary of State  
BALLOT DESIGNATION WORKSHEET**

(Elections Code §§ 13107, 13107.3, 13107.5; California Code of Regulations § 20711)

This entire form **must be completed**, or it will not be accepted and you will **not** be entitled to a ballot designation. **DO NOT LEAVE ANY RESPONSE SPACES BLANK.** If information requested is not applicable, please write "N/A" in the space provided, otherwise the information **MUST** be provided. **UPON FILING, THIS WORKSHEET WILL BE A PUBLIC RECORD.**

<b>Candidate Information</b>	<b>1</b>	Candidate Name: _____	Gender (optional, for translation use only): _____		
		Office: _____	Email: _____		
		Home Address: _____			
		Mailing Address: _____			
		Business Address: _____			
		Phone Number(s) Business: _____	Home/Mobile: _____	Fax: _____	

<b>Attorney Information</b>	<b>2</b>	Attorney Name (or other person authorized to act on your behalf): _____		
		Address: _____		
		Phone Number(s) Business: _____	Mobile: _____	Fax: _____

**You may select as your ballot designation one of the following designations:**

- (a) Your current principal profession(s), vocation(s), or occupation(s) [maximum total of three words, separated by a slash ("/")].
- (b) The full title of the public office you currently occupy and to which you were elected.
- (c) "Appointed [full title of public office]" if you currently serve by appointment in an elective public office and are seeking election to the same office or to some other office.
- (d) "Incumbent" if you were elected (or, if you are a Superior Court Judge, you are a candidate for the same office that you hold) to your current public office and seek election to the same office.
- (e) "Appointed Incumbent" if you were appointed to your current elective public office and seek election to the same office.

<b>Proposed Ballot Designation(s)</b>	<b>3</b>	Proposed Ballot Designation(s): _____
		Alternate Ballot Designation(s) 1: _____
		Alternate Ballot Designation(s) 2: _____

**In the spaces provided on the next page(s):**

- (a) Describe why you believe you are entitled to use the proposed ballot designation.
- (b) If your proposed ballot designation contains one or more slashes ("/") separating words in your ballot designation for separate principal profession(s), vocation(s), or occupation(s) (collectively known as "PVOs"), complete a justification section for each separate PVO.
- (c) Attach any documents or exhibits that you believe support your proposed ballot designation.
- (d) If using the title of an elective office, attach a copy of your certificate of election or appointment.
- (e) Any supporting documents will not be returned to you. **Do not submit originals.**

**It is your responsibility to justify your proposed ballot designation and to provide all requested details.**

If your proposed ballot designation includes the word "volunteer," indicate the title of your volunteer position and the name of the entity for which you volunteer along with a brief description of the type of volunteer work you do and the approximate amount of time involved. You may only use the ballot designation "community volunteer" if you volunteer for a 501(c)(3) charitable, educational, or religious organization, a governmental agency or an educational institution. You may not use "community volunteer" together with another designation.



If your proposed ballot designation contains **one or more slashes (“/”)** separating multiple principal profession(s), vocation(s), or occupation(s) (collectively known as “PVOs”), **complete a justification section for each separate PVO.**

**Justification for use of Proposed Ballot Designation(s)**  
 If you are proposing alternate ballot designations, please provide justification for use of those on **Page 3.**

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<b>Justification for use of 1<sup>st</sup> PVO:</b>		
Current or most recent job title:	Start/End Dates:	
Employer Name or Business:		
<b>Person who can verify this information:</b>		
Name:	Phone Number(s):	Email:
<b>Justification for use of 2<sup>nd</sup> PVO:</b>		
Current or most recent job title:	Start/End Dates:	
Employer Name or Business:		
<b>Person who can verify this information:</b>		
Name:	Phone Number(s):	Email:
<b>Justification for use of 3<sup>rd</sup> PVO:</b>		
Current or most recent job title:	Start/End Dates:	
Employer Name or Business:		
<b>Person who can verify this information:</b>		
Name:	Phone Number(s):	Email:

**Before signing below, answer/initial the following questions. Does your proposed ballot designation:**

- |     |  |  |               |
|-----|--|--|---------------|
| 1)  | Use only a portion of the title of your current elected office?  | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 2)  | Non-judicial candidates: Use only the word “Incumbent” for an elective office to which you were appointed?                   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 3)  | Use more than three total words for your principal professions, vocations, or occupations?                                   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 4)  | Suggest an evaluation of you, such as outstanding, leading, expert, virtuous, or eminent?                                    | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 5)  | Refer to a status (Veteran, Activist, Founder, Scholar), rather than a profession, vocation, or occupations?                 | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 6)  | Abbreviate the word “retired”?   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 7)  | Place the word “retired” after the words it modifies? Example: Accountant, retired   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 8)  | Use an word or prefix (except “retired”) such as “former” or “ex-” to refer to a former profession, vocation, or occupation? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 9)  | Use the word “retired” along with a current profession, vocation, or occupation? Example: Retired Firefighter/Teacher        | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 10) | Use the name of a political party or political body?   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 11) | Refer to a racial, religious, or ethnic group?   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |
| 12) | Refer to any activity prohibited by law?   | <input type="checkbox"/> Yes <input type="checkbox"/> No | Initial _____ |

**If the answer to any of these questions is “yes,” your proposed ballot designation is likely to be rejected.**

<b>X</b>	<div style="display: flex; justify-content: space-between; align-items: center; height: 40px;"> <span style="font-size: 2em;">/</span> <span style="font-size: 2em;">/</span> </div>
<b>Candidate’s Signature</b>	<b>Date Signed:    Month    Day    Year</b>

For your reference, attached are [Elections Code sections 13107, 13107.3, and 13107.5](#), and [California Code of Regulations \(CCR\), title 2, section 20711](#). You also may wish to consult [CCR, title 2, sections, 20712-20719](#) (found at [www.sos.ca.gov](http://www.sos.ca.gov)).



COMPLETE THIS PAGE ONLY IF one or more **Alternate Ballot Designation(s)** are provided. If this page is not applicable, **please initial:** \_\_\_\_\_.

Justification for  
 Alternate Ballot  
 Designation(s) 1

<b>A</b>	<b>Justification for use of 1<sup>st</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
	Employer Name or Business:		
	<b>Person who can verify this information:</b>		
	Name:	Phone Number(s):	Email:
	<b>Justification for use of 2<sup>nd</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
	Employer Name or Business:		
	<b>Person who can verify this information:</b>		
	Name:	Phone Number(s):	Email:
	<b>Justification for use of 3<sup>rd</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
Employer Name or Business:			
<b>Person who can verify this information:</b>			
Name:	Phone Number(s):	Email:	

Justification for  
 Alternate Ballot  
 Designation(s) 2

<b>B</b>	<b>Justification for use of 1<sup>st</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
	Employer Name or Business:		
	<b>Person who can verify this information:</b>		
	Name:	Phone Number(s):	Email:
	<b>Justification for use of 2<sup>nd</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
	Employer Name or Business:		
	<b>Person who can verify this information:</b>		
	Name:	Phone Number(s):	Email:
	<b>Justification for use of 3<sup>rd</sup> PVO:</b>		
	Current or most recent job title:	Start/End Dates:	
Employer Name or Business:			
<b>Person who can verify this information:</b>			
Name:	Phone Number(s):	Email:	



*For your reference, the relevant provisions of Elections Code section 13107 are reproduced below:*

(a) With the exception of candidates for Justice of the State Supreme Court or court of appeal, immediately under the name of each candidate, and not separated from the name by any line, unless the designation made by the candidate pursuant to Section 8002.5 must be listed immediately below the name of the candidate pursuant to Section 13105, and in that case immediately under the designation, may appear at the option of the candidate only one of the following designations:

(1) Words designating the elective city, county, district, state, or federal office which the candidate holds at the time of filing the nomination documents to which he or she was elected by vote of the people.

(2) The word "incumbent" if the candidate is a candidate for the same office which he or she holds at the time of filing the nomination papers, and was elected to that office by a vote of the people.

(3) No more than three words designating either the current principal professions, vocations, or occupations of the candidate, or the principal professions, vocations, or occupations of the candidate during the calendar year immediately preceding the filing of nomination documents.

(4) The phrase "appointed incumbent" if the candidate holds an office by virtue of appointment, and the candidate is a candidate for election to the same office, or, if the candidate is a candidate for election to the same office or to some other office, the word "appointed" and the title of the office. In either instance, the candidate may not use the unmodified word "incumbent" or any words designating the office unmodified by the word "appointed." However, the phrase "appointed incumbent" shall not be required of a candidate who seeks reelection to an office which he or she holds and to which he or she was appointed, as a nominated candidate, in lieu of an election, pursuant to Sections 5326 and 5328 of the Education Code or Section 7228, 7423, 7673, 10229, or 10515 of this code.

(b) (1) Except as specified in paragraph (2), for candidates for judicial office, immediately under the name of each candidate, and not separated from the name by any line, only one of the following designations may appear at the option of the candidate:

(A) Words designating the city, county, district, state, or federal office held by the candidate at the time of filing the nomination documents.

(B) The word "incumbent" if the candidate is a candidate for the same office that he or she holds at the time of filing the nomination papers.

(C) No more than three words designating either the current principal professions, vocations, or occupations of the candidate, or the principal professions, vocations, or occupations of the candidate during the calendar year immediately preceding the filing of nomination documents.

(2) For a candidate for judicial office who is an active member of the State Bar employed by a city, county, district, state, or by the United States, the designation shall appear as one of the following:

(A) Words designating the actual job title, as defined by statute, charter, or other governing instrument.

(B) One of the following ballot designations: "Attorney," "Attorney at Law," "Lawyer," or "Counselor at Law." The designations "Attorney" and "Lawyer" may be used in combination with one other current principal profession, vocation, or occupation of the candidate, or the principal profession, vocation, or occupation of the candidate during the calendar year immediately preceding the filing of nomination documents.

(3) A designation made pursuant to subparagraph (A) of paragraph (1) or paragraph (2) shall also contain relevant qualifiers, as follows:

(A) If the candidate is an official or employee of a city, the name of the city shall appear preceded by the words "City of."

(B) If the candidate is an official or employee of a county, the name of the county shall appear preceded by the words "County of."

(C) If the candidate is an official or employee of a city and county, the name of the city and county shall appear preceded by the words "City and County."

(D) If the candidate performs quasi-judicial functions for a governmental agency, the full name of the agency shall be included.

(c) A candidate for superior court judge who is an active member of the State Bar and practices law as one of his or her principal professions shall use one of the following ballot designations as his or her ballot designation: "Attorney," "Attorney at Law," "Lawyer," or "Counselor at Law." The designations "Attorney" and "Lawyer" may be used in combination with one other current principal profession, vocation, or occupation of the candidate, or the principal profession, vocation, or occupation of the candidate during the calendar year immediately preceding the filing of nomination documents.

(d) For purposes of this section, all California geographical names shall be considered to be one word. Hyphenated words that appear in any generally available standard reference dictionary, published in the United States at any time within the 10 calendar years immediately preceding the election for which the words are counted, shall be considered as one word. Each part of all other hyphenated words shall be counted as a separate word.

(e) The Secretary of State and any other elections official shall not accept a designation of which any of the following would be true:

(1) It would mislead the voter.



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**BALLOT DESIGNATION WORKSHEET**  
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(2) It would suggest an evaluation of a candidate, such as outstanding, leading, expert, virtuous, or eminent.

(3) It abbreviates the word "retired" or places it following any word or words which it modifies.

(4) It uses a word or prefix, such as "former" or "ex-," which means a prior status. The only exception is the use of the word "retired."

(5) It uses the name of any political party, whether or not it has qualified for the ballot.

(6) It uses a word or words referring to a racial, religious, or ethnic group.

(7) It refers to any activity prohibited by law.

(f) If, upon checking the nomination documents and the ballot designation worksheet described in Section 13107.3, the elections official finds the designation to be in violation of any of the restrictions set forth in this section, the elections official shall notify the candidate by registered or certified mail return receipt requested, addressed to the mailing address provided on the candidate's ballot designation worksheet.

(1) The candidate shall, within three days, excluding Saturday, Sunday, and state holidays, from the date he or she receives notice by registered or certified mail, or from the date the candidate receives actual notice of the violation, whichever occurs first, appear before the elections official or, in the case of the Secretary of State, notify the Secretary of State by telephone, and provide a designation that complies with subdivision (a) or (b).

(2) If a candidate fails to provide a designation that complies with subdivision (a) or (b) within the three-day period specified in paragraph (1), a designation shall not appear after the candidate's name.

(g) A designation given by a candidate shall not be changed by the candidate after the final date for filing nomination documents, except as specifically requested by the elections official as specified in subdivision (f) or as provided in subdivision (h). The elections official shall maintain a copy of the ballot designation worksheet for each candidate that appears on the ballot in the county for the same period of time as applied to nomination documents pursuant to Section 17100.

(h) The designation shall remain the same for all purposes of both primary and general elections, unless the candidate, at least 98 days before the general election, requests in writing a different designation which the candidate is entitled to use at the time of the request.

***For your reference, Elections Code section 13107.3 is reproduced below:***

(a) A candidate who submits a ballot designation pursuant to subdivision (a) of Section 13107 shall file a ballot designation worksheet that supports the use of that ballot designation by the candidate, in a format prescribed by the Secretary of State.

(b) The ballot designation worksheet shall be filed with the elections official at the same time that the candidate files his or her declaration of candidacy.

(c) In the event that a candidate fails to file a ballot designation worksheet in accordance with subdivision (a), no designation shall appear under the candidate's name on the ballot.

***For your reference, Elections Code section 13107.5 is reproduced below:***

(a) A candidate's ballot designation as "community volunteer" shall constitute a valid principal vocation or occupation for purposes of subdivision (a) of Section 13107, if not otherwise in violation of any of the restrictions set forth in that section, and subject to the following conditions:

(1) A candidate's community volunteer activities constitute his or her principal profession, vocation, or occupation.

(2) A candidate is not engaged concurrently in another principal profession, vocation, or occupation.

(3) A candidate may not use the designation of "community volunteer" in combination with any other principal profession, vocation, or occupation designation.

(b) The Secretary of State shall by regulation define what constitutes a community volunteer for purposes of this section.

***For your reference, California Code of Regulations section 20711 is reproduced below:***

(a) In order to facilitate review of a candidate's proposed ballot designation by the Secretary of State pursuant to Elections Code § 13107, the candidate shall submit, at the time of filing his or her proposed ballot designation on the Declaration of Candidacy, a completed Ballot Designation Worksheet on a form provided by the Secretary of State.

(b) All Ballot Designation Worksheets filed with the Office of the Secretary of State or the county elections officials pursuant to this section shall be public records and shall be available for inspection and copying at the public counter of the Elections Division of the Office of the Secretary of State, Fifth Floor, 1500 11th Street, Sacramento, California 95814, or at the office of the applicable county elections official.



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**BALLOT DESIGNATION WORKSHEET**  
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(c) The Secretary of State shall provide a master copy or copies of the Ballot Designation Worksheet to all elections officials responsible for providing and accepting the nomination documents for candidates in elections for offices certified by the Secretary of State. The Ballot Designation Worksheet shall request that the candidate proposing the ballot designation provide the following information:

- (1) The candidate's name, home, business and mailing addresses, telephone numbers, e-mail address, if available, and fax number;
- (2) A designation of the office for which the candidate is seeking election;
- (3) The name, home, business and mailing addresses, telephone numbers, e-mail address, if available, and fax number of the attorney representing the candidate or for any other person to be contacted in the event the Secretary of State requires further information regarding the proposed ballot designation;
- (4) The proposed ballot designation submitted by the candidate;
- (5) The candidate may submit one or more proposed alternate ballot designations ranked in order of the candidate's preference;
- (6) A brief statement identifying the factual basis upon which the candidate claims the proposed ballot designation and each proposed alternate ballot designation, including the following:
  - (A) If the candidate holds elected office and is submitting his or her proposed ballot designation pursuant to Elections Code § 13107, subdivisions (a)(1) or (a)(2), the candidate shall indicate the elective office he or she currently occupies and may attach a copy of his or her Certificate of Election;
  - (B) If the candidate is a judicial officer and is submitting his or her proposed ballot designation pursuant to Elections Code § 13107, subdivisions (a)(1) or (a)(2), the candidate shall indicate the elective office he or she currently holds and may attach either (A) a copy of his or her Certificate of Election or (B) a copy of his or her commission or certificate of appointment, issued at the time the candidate was appointed to the judicial office which he or she currently occupies;
  - (C) If the candidate submits a ballot designation pursuant to Elections Code § 13107, subdivision (a)(3), the candidate shall indicate:
    - (i) The title of the position or positions which he or she claims supports the proposed ballot designation;
    - (ii) The dates during which the candidate held such position;
    - (iii) A description of the work he or she performs in the position;
    - (iv) The name of the candidate's business or employer;
    - (v) The name and telephone number of a person or persons who could verify such information; and
    - (vi) A statement that the professions, vocations or occupations relied upon to support the proposed ballot designation constitute the primary, main or leading professions, vocations or occupations of the candidate, in accordance with the definition of the term "principal" as set forth at § 20714, subdivision (b).
  - (D) If the candidate submits a ballot designation pursuant to Elections Code § 13107, subdivision (a)(4), the candidate shall indicate the date on which he or she was appointed to the office for which he or she is an appointed incumbent.
- (d) The candidate may attach or append any supporting documents or other exhibits to his or her Ballot Designation Worksheet which he or she believes support his or her proposed ballot designation. Such attached documents or other exhibits shall be deemed to be incorporated by reference as part of the candidate's Ballot Designation Worksheet and shall be considered as such by the Secretary of State.
- (e) If a candidate requests a change of his or her ballot designation pursuant to Elections Code § 13107(e), that request shall be accompanied by a Ballot Designation Worksheet.

# CANDIDATE'S STATEMENT OF QUALIFICATIONS

Proposition 34, EC §13307, §13311, §13313

**Federal voter-nominated:** Congressional Representative candidates may prepare a statement of qualifications to be included in the County Sample Ballot Booklet. Each county within the district must be contacted separately. A candidate for U.S. Senator may prepare a statement of qualification to be included in the State Voter Information Guide. See Secretary of State for information, **cost and deadline.**

**State voter-nominated** (State Senate and Member of the Assembly). Candidates who accept the expenditure limits will be allowed to have a Statement of Qualifications printed in the County Sample Ballot Booklet. Each county must be contacted separately.

**Statewide candidates** (Governor, etc) Candidates that have agreed to the voluntary spending limits may have a Statement of Qualifications printed in the State Voter Information Guide. See Secretary of State for information, **cost and deadline.**

**Non-Partisan** (Judicial and County offices) Candidates may prepare a statement of qualification to be included in the County Sample Ballot Booklet. The statement is optional and not a requirement for filing for the office.

Statements shall be filed in the County Clerk-Recorder's Office. If the territory of an office encompasses more than one county, a statement must be filed in each County for the statement to be printed in each county's sample ballot booklet. Candidates for a position requiring nomination papers shall file their statement at the time their nomination papers are filed.

The statement **MAY** include:

- Name, Age, Occupation of the Candidate
- A brief description (no more than 250 words (Voter Nominated offices) or no more than 200 words (Non-Partisan offices)) of the candidate's education and qualifications expressed by the candidate in his/her own words (first person singular).

The statement **MAY NOT** include:

- The party affiliation of the candidate.
- Membership or activity in any partisan political organizations.
- References to other candidates for that office or to another candidate's qualifications, character, or activities. The elections official shall not cause to be printed or circulated any statement that the elections official determines is not so limited or that includes any reference prohibited in this section. (EC §13308)

The statement must be **typed** and follow the format on the form. Boldface type, bullets, boxes, arrowheads, diamonds, asterisks, all capital letters, or underlining are not allowed.

Candidates must file a hard copy of the statement as well as submit the statement electronically. The statement should be set out in block style paragraphs in type of uniform size and darkness and with uniform spacing.

Obvious spelling errors will be corrected; however the candidate should proof the statement very carefully for spelling, punctuation and grammar, as it will be printed as submitted.

The statement may be **WITHDRAWN**, by the candidate in writing, **BUT NOT CHANGED**, during the nomination period or the extension of the nomination period for non-incumbents only - and until 5:00 p.m., on the next working day after the close of the nomination period or the next working day after the close of the extension of the close of the nomination period for non-incumbents only.

Each candidate who files a statement of qualification will be required to pay an estimated deposit at the time the statement is filed to cover the cost of the printing and handling. The estimated deposit amount is an approximation of the actual cost and may be significantly more or less than the estimate, depending on the actual number of candidates filing statements. **Accordingly, the elections official is not bound by the estimate and will bill the candidate for additional actual expense or refund any excess amount paid depending on the final actual cost.**

The Candidate's Statement of Qualifications shall remain **confidential** until after the close of the nomination period and will be available for public examination for 10 days after the close of nominations. Any challenges to a statement must be made during this 10 day period. (EC§13313)



## CANDIDATE'S STATEMENT WORD COUNTING GUIDELINES

### EC §9

For purposes of this code, the following shall apply to the counting of words. This section shall not apply to counting words for Ballot Designations under EC §13107:

1.	Title and Signature and punctuation.	Not Counted
2.	Each word shall be counted as <b>one word</b> except as specified in this section.	One Word
3.	All proper nouns, including geographical names such as, "County of San Luis Obispo"	One Word
4.	Abbreviations for a word, phrase, or expression, such as UCLA, PTA, U.S.M.C., etc	One Word
5.	Hyphenated words that appear in any generally available dictionary, published in the US in the last 10 yrs. All other hyphenated words shall be counted as a separate word.	One Word
6.	Dates.	One Word
7.	Any number consisting of a digit or digits shall be considered as one word. Any number which is spelled, such as "one," shall be considered as a separate word or words. "One" shall be counted as one word whereas "one hundred" shall be counted as two words. "100" shall be counted as one word.	One Word One for each Word Two Words One Word
8.	Telephone numbers.	One word
9.	Internet web site address	One Word
Example	Numbers: Digits, such as 1, 10, 100 Spelled out – one, ten, one hundred Numerical Combinations – 2002, 5%, 2001-2002 Telephone Number/Email address	One Word One for each Word One Word One Word
Example	Monetary Amounts: Dollar Sign and Figures - \$500,000.00 Spelled Out – Five Hundred thousand dollars	One Word Four Words

## ESTIMATED COSTS OF CANDIDATE STATEMENTS

This estimate is for San Luis Obispo County only. If the office is multi-county jurisdictional please contact that county for information to have a candidate statement published in their sample ballot.

<b>SCHOOL DISTRICTS</b>			
<b>OFFICE</b>	<b>ESTIMATED COST: ENGLISH ONLY</b>	<b>ESTIMATED COST: ENGLISH &amp; SPANISH</b>	<b>OTHER COUNTY COST, IF APPLICABLE</b>
SLO CO Board of Education	TA1 - \$195 TA3 - \$410	\$490 \$920	
Santa Barbara CO Board of Education	TA 4 - \$320	\$	Santa Barbara - <b>TBD</b>
SLO CO Community College	\$320	\$740	
Atascadero USD	\$265	\$630	
Coast USD	\$155	\$410	
Cuyama JUSD	\$100	\$300	Santa Barbara - <b>TBD</b>
Lucia Mar USD	\$430	\$960	
Paso Robles JUSD	\$285	\$670	Monterey - <b>TBD</b>
San Luis Coastal USD	\$455	\$1010	
San Miguel Jt Union SD	\$130	\$360	Monterey - <b>TBD</b>
Santa Maria Bonita SD	\$100	\$300	Santa Barbara - <b>TBD</b>
Shandon JUSD	\$120	\$340	Monterey - <b>TBD</b>
Templeton USD	\$160	\$420	
Santa Maria Jt Union HSD	\$100	\$300	Santa Barbara - <b>TBD</b>
Cayucos Elementary SD	\$125	\$350	
Pleasant Valley Jt Union SD	\$115	\$330	Monterey - <b>TBD</b>

**MULTI-COUNTY OFFICES:** It is the candidate's choice to print the statement in the other county's sample ballot booklet. If a Non-Partisan candidate chooses to submit a statement to both counties he/she will make one check to San Luis Obispo County Clerk-Recorder and one check to the other county. The statement and check will be forwarded to that county. Voter-nominated candidates must contact the other counties to place a statement in that county's sample ballot booklet.

<b>COMMUNITY SERVICE DISTRICTS</b>		
<b>OFFICE</b>	<b>Estimated Cost: English Only</b>	<b>Estimated Cost: English &amp; Spanish</b>
Avila Beach CSD	\$115	\$330
California Valley CSD	\$115	\$330
Cambria CSD	\$140	\$380
Ground Squirrel Hollow CSD	\$120	\$340
Heritage Ranch CSD	\$125	\$350
Independence Ranch CSD	\$115	\$330
Linne CSD	\$115	\$330
Los Osos CSD	\$175	\$450
Nipomo CSD	\$160	\$420
Oceano CSD	\$140	\$380
San Miguel CSD	\$120	\$340
San Simeon CSD	\$115	\$330
Squire Canyon CSD	\$115	\$330
Templeton CSD	\$140	\$380

<b>SPECIAL DISTRICTS</b>		
<b>OFFICE</b>	<b>Estimated Cost: English Only</b>	<b>Estimated Cost: English &amp; Spanish</b>
Port San Luis Harbor District	\$615	\$1,330
Santa Margarita Fire Protection	\$120	\$340
Garden Farms Water District	\$115	\$330
Cambria Comm Healthcare	\$140	\$380
Cayucos Sanitary District	\$125	\$350

**NOTE:** The above Candidate Statement estimates are based on the number of candidates that would force a contest to election. Should less candidate statements than this number be submitted, the cost would be significantly more than the amount of the estimate.

## SAMPLE STATEMENT OF QUALIFICATIONS

It is recommended the candidate's statement contain no more than twenty-five (25) lines and carriage returns. The Elections Official is not responsible for the correct typesetting of statements that must be reconfigured to comply with these guidelines.

Although "Occupation" is not restricted by ballot designation limitations and may be more descriptive, words exceeding one line will be shortened.

**NOTE:** In order to ensure that submitted text will fit in the limited half-page space, the following may occur:

1. Lists and enumerations will be wrapped as a single paragraph;
2. Multiple single sentence paragraphs will be wrapped;
3. Indented text will be run together as a sentence.

Candidates utilizing the guidelines and suggestions will make their candidate statements uniform, fair, and legible.

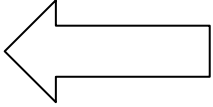
**STATEMENT OF CANDIDATE FOR  
OFFICE Jurisdiction/District**

**CANDIDATE NAME** **Age: (Optional)**  
**Occupation:** Incumbent, Former Member Chamber of Commerce, Businessman, Former Chair of the County Area Advisory Community

**Education and Qualifications:** Community Colleges provide educational opportunities for all students.  
 Over the past four years we have been forced to make some very difficult decisions.  
 - I have always made decisions based on how we can best serve our students and District during this time of economic uncertainty.  
 It has been my privilege to serve on the Cuesta College Board.  
 - I ask for your vote on June 5<sup>th</sup> so that I can continue to support our faculty, staff and administration to meet the needs of our students and business community of our District.  
 Since 1972 I have served at various times, the following SLO County and State organizations.

- Playhouse Nursery School
- PTA & Classroom Aid**
- SLO County Civil Service Commission*
- 4H Leader
- SLO County Board of Education

SLO County School Boards Association, Atascadero State Hospital Advisory Board, Friday Night Live Board, Partnership for the Children Board, State Advisory Group on Juvenile Justice, Grizzly Youth Academy. I have lobbied for public education at both the State and National level.  
 Thank you for your continued support of Cuesta College.



**INCORRECT  
FORMAT**

**STATEMENT OF CANDIDATE FOR  
OFFICE Jurisdiction/District**

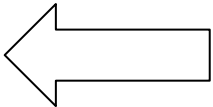
**CANDIDATE NAME** **Age: (Optional)**  
**Occupation:** Incumbent, Former Member Chamber of Commerce, Businessman

**Education and Qualifications:** Community Colleges provide educational opportunities for all students. Over the past four years we have been forced to make some very difficult decisions. I have always made decisions based on how we can best serve our students and District during this time of economic uncertainty.

It has been my privilege to serve on the Cuesta College Board. I ask for your vote on June 5<sup>th</sup> so that I can continue to support our faculty, staff and administration to meet the needs of our students and business community of our District.

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 Thank you for your continued support of Cuesta College.



**CORRECT  
FORMAT**