



# **CANDIDATE INFORMATION BOOKLET**

## **SEPTEMBER 14, 2021, CALIFORNIA GOVERNOR RECALL ELECTION**

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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.

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 \(EC\)](#) unless otherwise stated.

**Information effective July 2, 2021 (will be subject to change)  
Please contact this office with any questions.**

# TABLE OF CONTENTS

TABLE OF CONTENTS .....	3
SETTING CANDIDATE APPOINTMENT .....	5
IMPORTANT DATES FOR CANDIDATES .....	6
QUALIFICATIONS, FILING FEES & SIGNATURE REQUIREMENTS.....	8
GENERAL QUALIFICATIONS .....	8
VOTER-NOMINATED FILING FEES, SIGNATURES IN-LIEU, AND NOMINATION SIGNATURES .....	9
(Elections Code §8062, 8103, 8106(a)).....	9
CANDIDATE FILING REQUIREMENTS .....	9
PETITION IN-LIEU OF FILING FEE .....	9
PETITION IN-LIEU OF FILING FEE AND/OR NOMINATION PAPER.....	10
DECLARATION OF CANDIDACY AND NOMINATION PAPERS.....	10
WRITE-IN CANDIDATES .....	11
CANDIDATE’S STATEMENT OF QUALIFICATIONS .....	12
ESTIMATED COSTS OF CANDIDATE STATEMENTS .....	12
BALLOT NAMES AND DESIGNATIONS .....	13
<b>Candidate Information</b> .....	21
(b) “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. ....	21
(d) “Appointed Incumbent” if you were appointed to your current elective public office and seek election to the same office. ....	21
Proposed Ballot Designation(s).....	21
In the spaces provided on the next page(s):.....	21
(a) Describe why you believe you are entitled to use the proposed ballot designation. ....	21
(c) Attach any documents or exhibits that you believe support your proposed ballot designation. ....	21
It is your responsibility to justify your proposed ballot designation and to provide all requested details. ...	21
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. ....	21
X .....	2

Justification for Alternate Ballot Designation(s) 1 ..... 3

## SETTING CANDIDATE APPOINTMENT

Prospective candidates must schedule a nomination appointment prior to/during the nomination period.

To make candidate appointments efficient for everyone, candidates **must** call the Clerk Recorder's office at 805-781-5228 ahead of time and be prepared to provide the following information:

- 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
- Ballot Designation

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

Confidential Phone number is for Clerk's office use and not made public.

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

## IMPORTANT DATES FOR CANDIDATES

### September 14, 2021 California Gubernatorial Recall Election

<b><u>DATE</u></b>	<b><u>EVENT</u></b>
<b>July 1 – July 6, 2021</b> (E-75 to E-70)	Petition in lieu of filing fee period for Voter Nominated Offices EC §8106, 8106(b) <b>Please call the Elections Division at 805-781-5228 to make an appointment.</b>
<b>July 1 – July 16, 2021</b> (E-75 to E-70)	<b>Statewide Offices only (U.S. Senate and Constitutional Offices):</b> Candidate Statement Period for State Voter Information Guide to be filed with the Secretary of State
<b>July 9 – July 16, 2021</b> (E-67 to E-60)	Declaration of Candidacy and Nomination Period <b>Please call the Elections Division at 805-781-5228 to make an appointment.</b>
<b>July 16, 2021</b> E-60	Governor Candidates – Tax Returns and Written Consent and Acknowledgement Form Deadline EC §8902, 8903
<b>July 19, 2021</b> (E-57 11:00 am)	Random Alphabet Drawing EC §13111, 13112(b)(1)(B)
<b>July 17, 2021</b> (E-59)	Secretary of State to send Notice to Candidates for Voter-Nominated Offices
<b>July 19 – Aug 31, 2021</b> (E-57 – E-14)	Write-In Candidate Period EC §8601
<b>August 2, 2021</b> (E-43)	Semi-Annual Campaign Statement Filing Deadline GC §84200 84218 (1/1/21 thru 6/30/21)
<b>August 5, 2021</b> (E-40)	1 <sup>st</sup> Pre-Election Campaign Statement Due GC §84200.5, §84200.8, 84218
<b>TBD – Aug 24, 2021</b> (E-XX to E-21)	State Voter Information Guide Mailing Period EC §9094
<b>Aug 16, 2021</b> (E-29)	29 Day Close of Registration. All Counties to Mail Every Active Registered Voter a Vote-By-Mail Ballot and Packet EC §3000.5
<b>Aug 30, 2021</b> (E-15)	15 Day Close of Registration - EC §2102
<b>Sept 2, 2021</b> (E-12)	2 <sup>nd</sup> Pre-Election Campaign Statement Due Gov Code §84200.5, §84200.8 §84218

<b>Sept 7, 2021</b> (E-7)	Last day for Elections Office <b>to mail</b> Vote-by-Mail Ballots to voters. EC §3001
<b>Sept 14, 2021</b>	<b>Election Day. Polls open 7:00AM – 8:00PM</b>
<b>Oct 14, 2021</b> (E+30)	Complete Official Canvass
<b>Jan 31, 2022</b>	Semi-Annual Campaign Statement Due GC§84200, 84218

\*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. For additional deadlines and information regarding campaign finance, please refer to the Fair Political Practices website [www.fppc.ca.gov](http://www.fppc.ca.gov).

E- is and Election term meaning Election minus the days before the election.  
Example: E-12 is twelve days before the election.

## QUALIFICATIONS, FILING FEES & SIGNATURE REQUIREMENTS

OFFICE	TERM	TERM BEGINS	INCUMBENT/PARTY AFFILIATION	QUALIFICATIONS
FEDERAL				
Governor	TBD	TBD	Gavin Newsom	U.S. citizen; resident of California; The Governor may not hold another office: may not serve for more than two terms.

## GENERAL QUALIFICATIONS

<p>GENERAL QUALIFICATIONS</p> <p>EC §13.5, §20 &amp; §201</p> <p>COUNTY OFFICES 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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## VOTER-NOMINATED FILING FEES, SIGNATURES IN-LIEU, AND NOMINATION SIGNATURES (Elections Code §8062, 8103, 8106(a))

Filing fees are calculated based on the annual salary for the office in effect on the first day to circulate petitions to gather signatures in lieu of filing fees.

Office	Filing Fee/ Percentage	# of In- Lieu Signatures	Value of Each Signature	# of Nomination Signatures EC §8062
Governor	\$4,194.94 (2% of Salary)	7,000	\$0.950000	65 -100

**All filing fees for above offices must be paid by check made payable to “Secretary of State.” If the candidate is submitting signatures in-lieu of filing fees, the amount shall state “Not to Exceed (The Filing Fee)” in the memo line. The correct amount will be completed by the Secretary of State once the fee is calculated.**

**All filing fees received by the Secretary of State and the County Clerk-Recorder are non- refundable.**

## CANDIDATE FILING REQUIREMENTS

### PETITION IN-LIEU OF FILING FEE

EC §8061, §8105, §8106

**File between the dates of July 1, 2021 to July 6, 2021.**

A candidate may submit a petition containing signatures of registered voters in-lieu of paying the filing fee to run for office. The signatures submitted may cover all or a portion of the filing fee and shall be submitted by the deadline noted above or at the same time as the Declaration of Intention (Judicial Candidates only) or the Nomination Petition and Declaration of Candidacy- whichever occurs earlier.

Circulators of petitions in-lieu shall be registered voters in the jurisdiction in which the candidate is to be voted upon. The circulator shall only serve in the county in which he or she resides. The circulator(s) shall complete the Affidavit of Circulator portion in their own hand. Petition in-lieu of signatures sections will not be accepted for filing

unless the Affidavit of Circulator section is filled in completely.

No additional signatures may be filed after the filing date, but supplemental signatures may be filed to replace signatures in the original filing that were found to be invalid.

That portion of the filing fee not covered by the signatures must be paid in full before the nomination documents may be filed.

Signers must fill in the required information in their own hand.

Petitions in-lieu shall be filed with the election's official of the county in which the petitions were circulated.

## PETITION IN-LIEU OF FILING FEE AND/OR NOMINATION PAPER

EC §8020, §8040-8041, §8061-8062

If a candidate submits a petition in-lieu of filing fee, the candidate may request that all valid signatures appearing on the petition be counted toward the number of signatures required on the nomination paper. If the petition in-lieu of filing fee contains the requisite number of valid signatures required for the nomination paper, the candidate is not required to circulate and file a nomination paper. If the petition in-lieu of filing fee does not contain the requisite number of valid signatures required for the nomination paper the candidate may still circulate and file a nomination paper to be signed by qualified registered voters during the nomination period to obtain any additional signatures necessary.

## DECLARATION OF CANDIDACY AND NOMINATION PAPERS

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

**File between the dates of July 9, 2021 to July 16, 2021.**

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 election's official in the county of the candidate's residence no later than **5:00 p.m., Friday, July 16, 2021.**

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 handwriting. 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 election's official of the county in which the signers reside and are registered voters.

## WRITE-IN CANDIDATES

EC §8600-  
8605

**File between the dates of July 19, 2021 and August 31, 2021.**

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.

There is no filing fee to be a write-in candidate.

## CANDIDATE'S STATEMENT OF QUALIFICATIONS

### ESTIMATED COSTS OF CANDIDATE STATEMENTS

For this Recall Election, the Candidate Statement must be paid for and filed through the Secretary of State's office.

The cost is \$25 dollars a word with a maximum of 250 words. This filing period is **7/1/2021 thru 7/16/2021**. You must have agreed to accept the voluntary expenditure limits on your Form 501 Candidate Intention Statement in order to be able to file a Candidate Statement.

## 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 §1310

6

### **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 Primary election, this drawing will be conducted on **July 19, 2021**. The Secretary of State shall certify and transmit to each county elections official the order in which the names of federal and state candidates, with the exception of candidates for State Senate and Assembly, shall appear on the ballot. The elections official shall determine the order on the ballot of all other candidates using the appropriate randomized alphabet for that purpose.

## **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 election's 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 be subject to the three-word limit and 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.
  - Examples "Ret. Army General," "Navy Admiral, Retired" and "City Attorney, Retired" are not permissible
  - 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.”
  - Examples: “Former Congressman,” “Ex-Senator,” and “Former Educator” are not permissible
- Retired cannot be used in conjunction with another principal profession, occupation or vocation.
  - Example: Retired Educator/Salesperson is not permissible.
- It uses the name of any **political party**, whether or not it has qualified for the ballot.
  - Example: “Democratic Party Chair”, “Republican Central Committee member”, and “Socialist” are not permissible.
- It uses a word or words referring to a **racial, religious, or ethnic** group.
  - Examples: “Indian Sculptor,” “Latino Notary,” “African-American Firefighter,” “Christian Physician,” and “Caucasian Policeman” are not permissible.
  - 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. We will also email the candidate.

**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.**

Candidate  
Information

1

Candidate Name: \_\_\_\_\_ Gender (optional, for translation use only): \_\_\_\_\_

Office: \_\_\_\_\_ Email: \_\_\_\_\_

Home Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Business Address: \_\_\_\_\_

Phone Number(s) \_\_\_\_\_

Business: \_\_\_\_\_ Home/Mobile: \_\_\_\_\_ Fax: \_\_\_\_\_

Attorney  
Information

2

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:**

Your current principal profession(s), vocation(s), or occupation(s) [maximum total of three words, separated by a slash ("/")].

- (a) The full title of the public office you currently occupy and to which you were elected.
- (b) "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.
- (c) "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.
- (d) "Appointed Incumbent" if you were appointed to your current elective public office and seek election to the same office.

Proposed  
Ballot  
Designation(s)

3

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.**

4

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

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

X

/
/

Candidate’s Signature

Date Signed:

Month

Day

Year

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

A	<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>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.
- (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.

(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.