



**CITY OF MORGAN HILL**

**Candidate Instructional Guide:  
Running for Elective Office**

DISCLAIMER:

THIS MANUAL HAS BEEN PREPARED TO HELP GUIDE INTERESTED PARTIES THOUGH THE ELECTION PROCESS. PLEASE BE ADVISED THAT THE CITY CLERK CANNOT ENGAGE IN RENDERING LEGAL, ACCOUNTING OR OTHER PROFESSIONAL ADVICE OR SERVICES.

THE ENCLOSED MATERIALS ARE PROVIDED AS AN OVERVIEW OF REQUIREMENTS. HOWEVER, CANDIDATES ARE RESPONSIBLE FOR ENSURING THAT THEY MEET THE LEGAL REQUIREMENTS OF CALIFORNIA GOVERNMENT CODE, CALIFORNIA ELECTIONS CODE, AND THE MORGAN HILL MUNICIPAL CODE.

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# Introduction

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## ABOUT CITY GOVERNMENT

The City of Morgan Hill was incorporated on November 10, 1906. Morgan Hill is in southern Santa Clara Valley, approximately 12 miles south of San Jose, 10 miles north of Gilroy, and 15 miles inland from the Pacific Coast. The Valley is approximately 4 miles wide and is surrounded by the Santa Cruz mountain range to the west and the Diablo mountain range to the east. Parks and open spaces abound, making Morgan Hill one of the last communities in the region with a charming, small-town atmosphere.

The City Council consists of the Mayor and four council members representing separate districts within the City. All City voters elect the Mayor, while the council members are elected by voters residing in each district. The Mayor is required to live within the city limits, and each council member must live in the district they represent. The Mayor serves a two-year term, and the council members serve four-year terms. Elections are staggered and held in even number years. The Mayor and City Council seats for districts A and C are up for election in the same year, while the Mayor and City Council seats for districts B and D are up for election in the next even-numbered year. Candidates run for election during the November General election.

In the case of a special election to fill a vacant office, the candidate receiving the most votes in the special election shall be elected. The person elected to fill a vacancy shall hold office for the remaining term of the former incumbent. The City Council may choose to fill a vacant office by appointment rather than by special election.

The City Council establishes city policies, ordinances, and land uses; approves the City's bi-annual budget, contracts, and agreements; hears appeals of decisions made by City staff and citizen advisory groups; and appoints the City Manager and City Attorney. Council members serve on several outside committees and joint power authorities. The Mayor and council members receive an annual stipend and benefits.

Please refer to the Organization Chart in Appendix A for a detailed look at the City's organizational structure.

# Introduction

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## **BEING A MEMBER OF CITY COUNCIL**

Each council member represents a district of approximately 11,000 residents and serves as a liaison between the district's residents, businesses, and City staff. The Mayor represents the entire City (population of approximately 45,000 residents) and serves as a liaison, problem solver, and collaborator between organizations, businesses, and City staff on major City issues and projects. Please refer to Appendix B for a detailed City of Morgan Hill map.

The Office of the Mayor is located at City Hall.

## **Meetings**

The City Council holds meetings on the first, third, and fourth Wednesdays of the month at 6:00 p.m. in the City Council Chamber, located at 17555 Peak Avenue. The City Council adopts the regular meeting schedule annually accommodating for holidays, summer recess, and other events. Occasionally, special meetings or workshops are held before a regularly scheduled City Council meeting or as stand alone events.

Council members serve on outside committees, as well as on various joint power authorities and other committees. The joint power authorities and other committees include, but are not limited to, the Santa Clara County Library District Joint Powers Authority, Valley Transportation Authority, Santa Clara Valley Water District, Association of Bay Area Governments, and League of California Cities.

Materials for regular City Council meetings are compiled as an electronic agenda packet, which the City Clerk's Office produces and publishes on the Friday before the meeting. Meeting materials are published electronically on the [City's website](#); paper copies are not provided. Supplemental or amended materials may also be presented for consideration before or during the meeting. The respective agencies provide materials for authorities and other committees concerning their meetings.

## **Compensation**

Compensation, benefits, and allowances for the Mayor and council members are set by Ordinance. Please refer to Appendix C. Council members do not receive additional compensation for attendance at joint power authorities or other committees.

# Introduction

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## Terms of Office

Members take office at a Special City Council Meeting typically scheduled for the second Wednesday in December in the year of their election, and their terms of office shall commence on said date. The Mayor serves a two-year term, while Council members and the Treasurer serve four-year terms, and there are no limits on the number of terms a member can serve.

## Staff

The City Clerk's Office manages the centralized administrative functions of the Office of the Mayor and council members. These activities may include organizing public meetings, meeting with citizens or citizen groups, organizing and attending community events and meetings, coordinating meetings with the City Manager to review upcoming agenda items, responding to organizations that want to do business with the City, and responding to and handling constituent complaints and concerns.

## **RECORDS AND DISCLOSURE**

The California Public Records Act allows for public inspection of most government records. As a candidate for elective office, all documentation provided to the City of Morgan Hill, including email and written correspondence, may be subject to public disclosure unless otherwise exempt under the Act. The Nomination Petition is the only document requiring the candidate's home address. However, pursuant to Elections Code section 17100, public access to this document is limited to viewing only. The petition may not be copied, distributed, or posted online.

All campaign reporting forms are public documents under the Political Reform Act and are subject to disclosure. Campaign reporting is required to provide receipts and expenditures in election campaigns and to disclose the assets and income of public officials that may affect their official actions. Address information is redacted from online forms posting; however, full, unreacted versions shall be provided to the public upon request.

# Running for Office

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## WHO CAN RUN FOR OFFICE?

A candidate for City Council shall be at least 18 years of age, a citizen of the United States, and a resident and registered voter in the district they seek to represent. Candidates for Mayor or Treasurer shall be residents and registered voters within the City limits of Morgan Hill.

Voter registration shall be verified with the Santa Clara County Registrar of Voters Office before the issuance of nomination documents.

## NOMINATION PROCESS

To qualify as a candidate on the ballot, a candidate shall successfully complete the nomination process. This process includes the submission of a Nomination Petition (issued by the Office of the City Clerk) with no less than 20, but no more than 30 signatures of registered voters residing in the district of the office sought. In addition to the petition, the following forms shall be submitted to the Office of the City Clerk:

- Ballot Designation Worksheet
- Statement of Economic Interests Form 700
- Candidate Campaign Statement Short Form 470 (if applicable)
- Candidate's Statement
  - Payment for Candidate Statement (OR indigence forms)
- Code of Fair Campaign Practices

There is no filing fee for submission of nomination documents, however there is a cost for a candidate statement if the candidate chooses to have one. All documents shall be submitted at one time. Once the nomination documents have been submitted to the Office of the City Clerk, no changes shall be made, nor shall any additional information be provided. This guide shall provide detailed information regarding each form in the nomination documents.

# Running for Office

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## **Nomination Period for the November 2024 Election**

Per the Elections Code, the nomination period shall begin on Monday, July 15, 2024, and end on Friday, August 9, 2024, at 5:00 p.m. During the nomination period, the Office of the City Clerk shall issue and accept official nomination documents during the regular business hours of Monday – Friday, 9:00 a.m. to 4:00 p.m. Should an incumbent not run for reelection, the nomination period for that seat is extended until August 14, 2024, at 5:00 p.m.

All interested candidates must schedule an appointment with the City Clerk's Office to pick up nomination paperwork to ensure that candidates receive all applicable documents and information and understand the overall nomination process. Appointments can be made [online](#) or by [emailing the City Clerk's Office](#). All completed nomination documents must be submitted at one time. Nomination documents must be typed using the electronic fillable forms (not handwritten) provided by the City Clerk's Office, printed, and signed for submission. The only exception is the Nomination Petition, which is provided in paper format and requires wet signatures.

To ensure that nomination documents are complete and aligned with Elections Code and City Code requirements, candidates must schedule a submission appointment with City Clerk's Office staff before the filing deadline. This provides time to review documentation with elections staff and ensure that documentation is complete and acceptable. Appointments to pick up and submit nomination documents may be made [online](#) or by [emailing the City Clerk's Office](#).

## **Filing Nomination Documents**

ALL nomination documents must be submitted to the City Clerk's Office at one time and by appointment. The deadline for filing nomination documents is Friday, August 9, 2024, at 5:00 p.m. Candidates arriving after the deadline shall be turned away. NO EXCEPTIONS ARE PERMITTED.

## **Withdrawal of Candidacy**

Withdrawal of candidacy is permitted up to the close of the nomination period on Friday, August 9, 2024, at 5:00 p.m.

# Running for Office

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## ORDER OF NAMES ON THE BALLOT

The Secretary of State shall conduct a randomized alphabetical drawing after the close of the nomination period to determine the order of names on the ballot. Candidates shall be notified of the order via email within one week of the drawing.

## CANDIDATE ACTION CALENDAR

Action/Description	Date
Nomination Period	07/15/2024- 08/9/2024
Nomination Documents Filing Deadline with the City Clerk	08/9/2024
Secretary of State to Hold Randomized Alphabetical Drawing	08/15/2024
First Pre-Election <i>Campaign Disclosure Statement Form 460 Filing Deadline</i>	09/26/2024
Write-in Nomination Period	09/9/2024- 10/22/2024
Contribution/Independent Expenditures (\$1,000 to or from a single source)	08/7/2024- 11/05/2024
Second Pre-Election <i>Campaign Disclosure Statement Form 460 Filing Deadline</i>	10/24/2024
<b>Election Day</b>	<b>11/05/2024</b>
Filing deadline for Semi-Annual <i>Campaign Disclosure Statements Form 460</i>	01/31/2025

# Nomination Petition

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Each candidate shall be nominated by no less than 20 but no more than 30 registered voters residing within the district of the office sought. This is accomplished by obtaining voters' signatures on a *Nomination Petition*. The *Nomination Petition* can only be issued by the City Clerk's Office. The petition shall remain intact as one document. Separating the pages shall invalidate the petition. The City Clerk's Office shall prepopulate the information on the petition's first page. A sample *Nomination Petition* is included at the end of this section.

## **SIGNING A NOMINATION PETITION**

Any registered voter in the district where the office is sought, including the candidate, may sign a *Nomination Petition*. However, a registered voter shall only sign the petition of one candidate running for office in their district. If a registered voter signs more than one petition, the signature shall count only on the *Nomination Petition*, which is filed first. The signature shall be written in the same manner as their voter registration.

## **CANDIDATE'S INFORMATION**

The City Clerk's Office shall request this information, which shall be prepopulated on the petition. The address used shall be the residential address that qualifies the candidate to run for the office sought.

## **CIRCULATING THE NOMINATION PETITION**

The *Nomination Petition* may be circulated by the candidate or any other person 18 years of age qualified to vote in the State of California. Only one person may circulate the petition. Whoever circulates the petition must personally witness each signature and complete and sign the *Declaration of Circulator*. This includes name, address, and circulation dates and is signed under penalty of perjury.

## **AFFIDAVIT OF NOMINEE**

The City Clerk's Office shall prepopulate the *Affidavit of Nominee* and *Oath or Affirmation of Allegiance* with the candidate's name and office sought.

The candidate is responsible for completing the box with their name and occupation as it shall appear on the official ballot. The name shall be printed using ALL CAPITAL LETTERS. If the candidate wishes, a nickname may be used in addition to the formal name; however, titles or degrees are not permitted.

# Nomination Petition

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The *Nomination Petition* includes space to list a ballot designation. A ballot designation is a description of the candidate's elected or appointed office or their principal profession, vocation, or occupation, which shall appear under the candidate's name in the official sample ballot.

The candidate's ballot designation shall be printed using uppercase and lowercase letters. Before completing this information, candidates should review the section related to Ballot Designations in this guide. Candidates are not required to use a ballot designation and may opt to leave the space on the *Nomination Petition* blank. To notify the Office of the City Clerk that a designation is not being submitted, the candidate shall place their initials to the left of the line that would otherwise have contained the designation.

Finally, the candidate shall sign and date the oath/affirmation under penalty of perjury. This is a self-affirmation that is not required to be given in the presence of the City Clerk.

## **SUPPLEMENTAL NOMINATION PETITION**

If, after submitting nomination documents, the petition is verified to have less than the minimum number of signatures needed to qualify, the candidate may be issued a *Supplemental Nomination Petition*. With this supplemental petition, the candidate may gather additional qualifying signatures.

Supplemental petitions shall not be issued after the filing deadline. Therefore, if a candidate is unsure they have sufficient qualified signatures, they should submit nomination documents early. The issuance of a supplemental petition does not extend the filing deadline. The original petition shall remain on file with the Office of the City Clerk.

## **HANDLING THE NOMINATION PETITION**

As provided in Elections Code section 18200-18205, no person shall submit a nomination paper knowing that any part of it has been made falsely. No person shall fraudulently deface, destroy, or willfully suppress all or part of any nomination paper; or deliberately fail to file at the proper time and in the proper place any nomination paper in their possession entitled to be filed. No person shall, directly or indirectly, pay, solicit, or receive anything of value to induce a person not to become or to withdraw as a candidate.

# Nomination Petition

<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;"><b>DECLARATION OF CIRCULATOR</b></p> <p>Any person that is 18 years of age or older may circulate a nomination paper. (Only 1 circulator may circulate this nomination paper). (Do NOT type this section. It <b>MUST</b> be filled out in your own handwriting.)</p> <p>I, _____, (print name), solemnly swear (or affirm) all of the following:</p> <ol style="list-style-type: none"> <li>1. That I am 18 years of age or older.</li> <li>2. That my residence address, including street and number, is _____, (if no street or number exists, a designation of my residence adequate to readily ascertain its location is _____).</li> <li>3. That the signatures on the nomination papers were obtained between the dates of _____ and _____; that I circulated this petition and I saw the signatures on this section of the nomination papers being written; and that, to the best of my information and belief, each signature is the genuine signature of the person whose name it purports to be.</li> </ol> <p>I certify (or declare) under the penalty of perjury under the laws of the State of California that the foregoing is true and correct.</p> <p>Executed by me at _____, on _____. (Election Code §§ 102, 104, 10220, 10222, 10226) _____ (Signature of Circulator)</p> </div> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p style="text-align: center;"><b>AFFIDAVIT OF NOMINEE AND OATH OR AFFIRMATION OF ALLEGIANCE</b></p> <p>State of California County of _____, ss.</p> <p style="text-align: center;">Kristi Anderson (Print Name of Nominee)</p> <p>Council District 6 (Print Name of Office)</p> <p>Name &amp; Occupation as it will appear on Official Ballot &amp; in Voter Pamphlet: (Print Name in ALL CAPS as you want it to appear on the ballot) (no title or degree is allowed before or after your name)**</p> <p><input type="checkbox"/> Male <input type="checkbox"/> Female (Print Designation as it will appear on the ballot)* (Print residence address as provided by affiant)</p> <p>I, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States and the Constitution of the State of California against all enemies, foreign and domestic; that I will bear true faith and allegiance to the Constitution of the United States and the Constitution of the State of California; that I take this obligation freely, without any mental reservation or purpose of evasion; and that I will well and faithfully discharge the duties upon which I am about to enter.</p> <p>I certify (or declare) under the penalty of perjury under the laws of the State of California that the foregoing is true and correct.</p> <p>Executed by me at _____, on _____. (place) _____ (date) (Signature of Candidate)</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;"><b>* BALLOT DESIGNATION REQUIREMENTS</b></p> <p>* At the option of the candidate, <b>ONLY ONE</b> of the following designations may be used:</p> <ol style="list-style-type: none"> <li>1. The words designating the electorate or county, district, state or federal office which the candidate holds at the time of filing the nomination papers to which he or she was elected by vote of the people, or to which he or she was appointed, in the case of a superior or municipal court judge.</li> <li>2. The word "incumbent" (without any other word(s)) 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, or in the case of a superior or municipal court judge, was appointed to that office.</li> <li>3. Not 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. 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 U.S., at any time within the 10 calendar years immediately preceding the election for which the words are counted, shall be considered one word. Each part of all other hyphenated words shall be counted as a separate word. The use of the word "Retired" by itself or as a prefix is acceptable, but not after any other word or words (e.g. "Retired" and "Retired Army Officer" is permissible; "U.S.M.C., Retired" is not).</li> <li>4. The phrase "Appointed Incumbent" if the candidate holds office by virtue of appointment, but may not use the unmodified word "Incumbent".</li> </ol> <p>No candidate shall assume a designation which would mislead the voters. (Election Code 13107, 13107.5) ** No title or degree shall appear on the same line on a ballot as a candidate's name, either before or after the candidate's name. (Election Code 13106)</p> </div>	<p style="text-align: center;"><b>NOMINATION PAPER</b></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;"><b>OFFICIAL FILING FORM</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">City Clerk or Deputy City Clerk</td> <td style="width: 50%;">Date</td> </tr> </table> </div> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>We, the undersigned voters, hereby nominate Kristi Anderson for the office of Council District 6 for the City of Sacramento to be voted for at the Primary Municipal Election to be held on Tuesday, June 5, 2018</p> </div> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">1</th> <th style="width: 40%;">Sign Name Print Name</th> <th style="width: 40%;">Residence Address</th> <th style="width: 20%;">For Official Use</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>3</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>4</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>5</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>6</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>7</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>8</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>9</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> <tr> <td>10</td> <td>Sign Name Print Name</td> <td>Residence Address</td> <td></td> </tr> </tbody> </table> </div>	City Clerk or Deputy City Clerk	Date	1	Sign Name Print Name	Residence Address	For Official Use	2	Sign Name Print Name	Residence Address		3	Sign Name Print Name	Residence Address		4	Sign Name Print Name	Residence Address		5	Sign Name Print Name	Residence Address		6	Sign Name Print Name	Residence Address		7	Sign Name Print Name	Residence Address		8	Sign Name Print Name	Residence Address		9	Sign Name Print Name	Residence Address		10	Sign Name Print Name	Residence Address	
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# Nomination Petition

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28	Sign Name Print Name	Residence Address	For Official Use
29	Sign Name Print Name	Residence Address	
30	Sign Name Print Name	Residence Address	

## DECLARATION OF CIRCULATOR

(on next page)

(Only 1 person who is 18 years of age or older  
may circulate a municipal nomination paper, per Elections Code Sections 104, 10220, 10222)

## AFFIDAVIT OF NOMINEE AND OATH OR AFFIRMATION OF ALLEGIANCE

(on next page)

(A candidate may sign his or her own nomination paper)

CANDIDATE'S PERSONAL INFORMATION			
Kristi Anderson Candidate's name 1 My Street		916-485-7777 Day Phone 916-485-7777 Evening Phone N/A Fax	
Candidate's Residence Address			
Mailing Address (if different than above)			
Sacramento City	CA State	95814 Zip	kristi4CC2014@gmail.com Email Address

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# Nomination Petition

<b>SUPPLEMENTAL NOMINATION PETITION</b>  <b>DECLARATION OF CIRCULATOR</b> Any person that is 18 years of age or older may circulate a nomination paper. (Only 1 circulator may circulate this nomination paper). (Do NOT type this section. It <b>MUST</b> be filled out in your own handwriting.) I, _____ (print name), solemnly swear (or affirm) all of the following: 1. That I am 18 years of age or older. 2. That my residence address, including street and number, is _____, (if no street or number exists, a designation of my residence adequate to readily ascertain its location is _____). 3. That the signatures on this nomination paper were obtained between the dates of _____ and _____; that I circulated this petition and I saw the signatures on this section of the nomination papers being written; and that, to the best of my information and belief, each signature is the genuine signature of the person whose name it purports to be. I certify (or declare) under the penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed by me at _____, on _____ (place) (date) _____ (Signature of Circulator) (Election Code §§ 102, 104, 10220, 10222, 10226)	<b>SUPPLEMENTAL NOMINATION PAPER</b>  <table border="1"><tr><td colspan="2">OFFICIAL FILING FORM</td></tr><tr><td colspan="2">City Clerk or Deputy City Clerk</td></tr><tr><td colspan="2">Date</td></tr></table> <p>We, the undersigned voters, hereby nominate Kristi Anderson for the office of Council District 6 for the City of Sacramento to be voted for at the Primary Municipal Election to be held on Tuesday, June 5, 2018</p> <table border="1"><thead><tr><th>Sign Name</th><th>Residence Address</th><th>For Official Use</th></tr></thead><tbody><tr><td>1 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>2 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>3 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>4 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>5 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>6 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>7 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>8 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>9 Print Name</td><td>Residence Address</td><td></td></tr><tr><td>10 Print Name</td><td>Residence Address</td><td></td></tr></tbody></table> <p>Public access to this document shall be limited to viewing the document only. The election official may not copy or distribute copies of documents that contain signatures of voters. (E.C. Section 17100)</p>	OFFICIAL FILING FORM		City Clerk or Deputy City Clerk		Date		Sign Name	Residence Address	For Official Use	1 Print Name	Residence Address		2 Print Name	Residence Address		3 Print Name	Residence Address		4 Print Name	Residence Address		5 Print Name	Residence Address		6 Print Name	Residence Address		7 Print Name	Residence Address		8 Print Name	Residence Address		9 Print Name	Residence Address		10 Print Name	Residence Address	
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# Nomination Petition

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27	Sign Name Print Name	Residence Address	
28	Sign Name Print Name	Residence Address	For Official Use
29	Sign Name Print Name	Residence Address	
30	Sign Name Print Name	Residence Address	

**DECLARATION OF CIRCULATOR**  
(on next page)

(Only 1 person who is 18 years of age or older  
may circulate a municipal nomination paper, per Elections Code Sections 104, 10220, 10222)

(A candidate may sign his or her own nomination paper)

<b>CANDIDATE'S INFORMATION</b>			
Kristi Anderson Candidate's name		916-485-7777 Day Phone	
12 My Street Candidate's Residence Address		916-485-7777 Evening Phone N/A	
Mailing Address (if different than above)			
Sacramento City	CA State	95814 Zip	kristi4CC2014@gmail.com Email Address

# Ballot Designation

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Candidates who qualify for the ballot have the option of a printed ballot designation directly below their name. This designation is used to describe the candidate's elected or appointed office or their principal profession, vocation, or occupation. Elections Code requires the completion of a *Ballot Designation Worksheet* as part of the nomination documents, even if choosing no ballot designation. A sample *Ballot Designation Worksheet* is included at the end of this section.

Ballot designations shall strictly adhere to the provisions of the Elections Code. After the filing of nomination documents, the City Clerk shall review and verify that each designation complies. If a ballot designation does not adhere to the Elections Code, the candidate shall be notified that the designation shall be changed. If the candidate does not respond within three days of the notification, the City Clerk shall withdraw the designation.

## **SELECTING A BALLOT DESIGNATION**

A candidate may submit a proposed ballot designation according to one of four provisions outlined in the Elections Code.

1. The name of the candidate's elective office;
2. The term "incumbent" as it refers to the current holder of the office;
3. The term "appointed incumbent" or "appointed" refers to the current appointed holder of the office; OR
4. The principal profession, vocation, or occupation of the candidate.

### **Option 1: Name of Candidate's Elective Office**

When a candidate holds elective office or is a judicial officer, the designation may be the elective office the candidate holds when filing nomination documents. There is no word limit for designations under this category. For example: Morgan Hill City Council member, City Council Member District A; or Santa Clara County Supervisor.

A copy of the candidate's official *Certificate of Election* shall be provided to the Office of the City Clerk as proof of elective office. A copy of the *Certificate of Appointment* shall be provided for a judicial officer.

# Ballot Designation

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## Option 2: Term "Incumbent"

The term "incumbent" shall only be used by a candidate who is a candidate for the same office which they hold at the time of filing nomination documents. The term "incumbent" shall not be used with any other words, including accompanying adjectives or modifiers; it must stand alone. A copy of the candidate's official *Certificate of Election* shall be provided as proof of elective office.

## Option 3: Terms "Appointed Incumbent" or "Appointed"

A candidate may propose a ballot designation consisting of the phrase "appointed incumbent" if the candidate holds an office other than a judicial office by appointment and is a candidate for election to the same office. A copy of the candidate's official *Certificate of Appointment* shall be provided as proof of appointment.

Under this option, a candidate may also propose a ballot designation consisting of the word "appointed" in conjunction with the elective office if the candidate is a candidate for election to the same office or some other office. There is no word limit for designations under this category. For example Appointed Morgan Hill City Council member.

## Option 4: Principal Profession, Vocation, or Occupation

**Principal**, as used by the Elections Code, means a substantial involvement of time and effort such that the activity is one of the candidate's primary, main or leading professional, vocational or occupational endeavors. The term precludes any activity which does not entail a significant involvement on the part of the candidate. Involvement that is only nominal, pro forma, or titular in character does not meet the requirements of the statute.

**Profession** means a field of employment requiring special education or skill and specific knowledge of a particular discipline of learning or science. The labor and skill involved in a profession are predominantly mental or intellectual rather than physical or manual. Professions generally include law, medicine, education, engineering, accountancy, and journalism. Examples include Attorney, Physician, or Teacher.

# Ballot Designation

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**Vocation** means a trade, religious calling, or the work upon which a person, in most but not all cases, relies for their livelihood and spends a significant portion of their time. As defined, vocations may include, but are not limited to, religious ministry, child rearing, homemaking, elderly and dependent care, and engaging in trades such as carpentry, cabinetmaking, plumbing, and the like. Examples include Priest, Homemaker, or Electrician.

**Occupation** means the employment in which one regularly engages or follows to make a livelihood. Examples include Rancher, Construction Worker, or Police Officer.

If a candidate is licensed by the State of California to engage in a profession, vocation, or occupation, the candidate is entitled to consider it as their principal profession, vocation, or occupation if the candidate has a current, active license as of the date of filing nomination documents and has complied with all applicable requirements respective of the licensure, such as payment of licensing fees. A candidate may not use a ballot designation based on an inactive license, suspended or revoked by the issuing agency.

## General

A candidate may engage in multiple principal professions, vocations, or occupations. Accordingly, the candidate may designate multiple principal professions, vocations, or occupations. If a candidate proposes a designation of this type, the designation shall be limited to three words and be separated by a slash "/". Each principal profession, vocation, or occupation shall independently qualify as a principal profession, vocation, or occupation. For example: Legislator/Rancher/Physician; or Teacher/Construction Worker.

Punctuation shall be limited to using a comma "," or a slash "/". A hyphen may only be used if it is called for in the word's spelling as it appears in a standard reference dictionary of the English language. An acronym shall be counted as one word.

All California geographical names shall be considered one word and shall be limited to the names of cities, counties, and states. Elections Code does not consider the names of special districts and political subdivisions to be geographical names. If the candidate desires, the geographical name may be used in the form of "City of ...," "County of ...," or "City and County of ..." Examples of geographical names considered to be one word include City and County of San Francisco, Los Angeles County and County of Sacramento.

# Ballot Designation

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In the event the candidate does not have a current principal profession, vocation or occupation at the time of filing nomination documents, the candidate may use a ballot designation consisting of a principal profession, vocation, or occupation in which the candidate was principally engaged in during the calendar year immediately preceding the filing of nomination documents.

## **Retired**

Retired as a ballot designation is generally limited to individuals who have permanently given up their chosen principal profession, vocation, or occupation. The City Clerk shall consider the following for any designation, including the word retired:

- Before retiring from their principal profession, vocation, or occupation, the candidate worked in such profession, vocation, or occupation for more than five (5) years;
- The candidate is collecting, or eligible to collect, retirement benefits or other type of vested pension;
- The candidate has reached at least the age of 55 years;
- If the candidate is requesting a ballot designation indicating that they are a retired public official, the candidate shall have previously voluntarily retired from public office, not have been involuntarily removed from office, not have been recalled by voters, and not have surrendered the office to seek another office or failed to win reelection to the office;
- The candidate voluntarily left their last principal professional, vocational, or occupational position;
- The candidate has not had another more recent, intervening principal profession, vocation, or occupation; and
- The candidates' retirement benefits provide them with a principal source of income.

# Ballot Designation

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## **UNACCEPTABLE BALLOT DESIGNATIONS**

Any ballot designation that is prohibited by the Elections Code, is misleading, or otherwise improper shall be rejected. The following types of activities are distinguished from professions, vocations, or occupations and are not acceptable designations:

### **Avocations**

An avocation is a casual or occasional activity, diversion, or hobby pursued principally for enjoyment and in addition to the candidate's principal profession, vocation, or occupation. Avocations may include, but are not limited to, hobbies, social activities, volunteer work, and matters pursued as an amateur.

### **Pro Forma Professions, Vocations and Occupations**

Pro forma professions, vocations, or occupations are positions held by the candidate which consume little or none of the candidate's time and which, by their nature, are voluntary or for which the candidate is not compensated.

Pro forma professions, vocations, and occupations may include, but are not limited to such pursuits as honorary peace officer, volunteer firefighter, honorary chairperson, honorary professor, goodwill ambassador, official host or hostess, and the like.

### **Statuses**

A status is a state, condition, social position, or legal relation of the candidate to another person, persons, or the community. A status is generic and generally fails to identify with any specificity how the candidate earns their livelihood or spends most of their time. Examples of status include, but are not limited to philanthropist, activity, patriot, taxpayer, concerned citizen, husband, wife, and the like.

In addition, a ballot designation shall not:

- Be comprised of 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 improper use of commercial identification information include, but are not limited to, Acme Company President, UCLA Professor, Director Smith Foundation, and the like;

# Ballot Designation

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- Suggest an evaluation of the candidate's qualifications, honesty, integrity, leadership abilities, or character. Any laudatory or derogatory adjectives which would suggest an evaluation of the candidate's qualifications shall not be permitted. Such impermissible adjectives include, but are not limited to, outstanding, leading, expert, virtuous, eminent, best, exalted, prominent, famous, respected, honored, honest, dishonest, corrupt, lazy, and the like;
- Abbreviate the word retired or place it following any word or words which it modifies. Examples of impermissible designations include: Ret. Army General; Major USAF, retired; or City Attorney, Retired;
- Use a word or prefix to indicate a prior profession, vocation, occupation, or elected, appointed, or judicial office previously held by the candidate. Such impermissible words or prefixes include but are not limited to, Ex-, former, past, and erstwhile. Examples of impermissible designations include Former Congressman, Ex-Senator, and Former Educator;
- Expressly contains or implies any ethnic or racial slurs or ethnically or racially derogatory language;
- Include the name of any political party;
- Include a word(s) referring to a racial, religious, or ethnic group; or
  - If the candidate is a clergy member, the candidate may not refer to their specific denomination. However, the candidate may use their clerical title as a ballot designation (e.g., Rabbi, Pastor, Minister, Priest, Bishop, Deacon, Monk, Nun, Imam, etc.).
- Refer to any activity prohibited by law. Unlawful activity includes any activities, conduct, professions, vocations, or occupations prohibited by state or federal law.

## BALLOT DESIGNATION WORKSHEET

All candidates, whether proposing a ballot designation or not, must submit a *Ballot Designation Worksheet* with nomination documents. Any required verification documentation shall accompany this worksheet and be provided when submitting

# Ballot Designation

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nomination documents. The form shall be typed using the electronic fillable form; handwritten forms shall not be accepted.

A sample *Ballot Designation Worksheet* is included at the end of this section. On the worksheet, the candidate shall be asked to indicate which of the four options is being selected for their proposed designation.

If the candidate selects option 4 (principal profession, vocation, or occupation) as their designation type, the candidate shall provide their preferred designation and may elect to propose alternate designations. The alternate designations shall only be considered if the preferred designation does not adhere to the provisions of the Elections Code. Ballot designations proposed under this category shall be verifiable. Therefore, the candidate shall complete the *verification* section of the worksheet. If needed, the City Clerk shall verify the information submitted and may ask the candidate for additional verifying information.

If the candidate selects option 1, 2, or 3 as the designation type of "candidate's elective office," "incumbent," or "appointed incumbent," or the word "appointed" in conjunction with the "elective office," the candidate shall attach a copy of the official *Certificate of Election* or *Certificate of Appointment*.

If the candidate does not wish to submit a ballot designation, the worksheet shall be completed, and the candidate shall select the **No Ballot Designation** option.

# Ballot Designation

## Ballot Designation Worksheet

Pursuant to California Elections Code section 13107.3 and California Code of Regulations section 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	<p>Candidate Name: _____</p> <p>Office: _____</p> <p>Home Address: _____ E-Mail: _____</p> <p>Business Address: _____</p> <p>Mailing Address: _____</p> <p>Phone Number(s) Business: _____ Home/Mobile: _____ Fax: _____</p>
Attorney Information	<p>Gender (optional, for translation use only): _____</p> <p>Attorney Name (or other person authorized to act in your behalf): _____</p> <p>Address: _____</p> <p>Home Address: _____ E-Mail: _____</p> <p>Business Address: _____</p> <p>Mailing Address: _____</p> <p>Phone Number(s) Business: _____ Home/Mobile: _____ Fax: _____</p>

Proposed Ballot Designation: \_\_\_\_\_

1<sup>st</sup> Alternative: \_\_\_\_\_

2<sup>nd</sup> Alternative: \_\_\_\_\_

You may select as your ballot designation:

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

In the space provided on the next page or on an attachment sheet, describe why you believe you are entitled to use the proposed ballot designation. Attach any documents or exhibits that you believe support your proposed ballot designation. If using the title of an elective office, attach a copy of your certificate of election or appointment. These documents will not be returned to you. Do not submit originals.

# Ballot Designation

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.

**Remember, it is your responsibility to justify your proposed ballot designation and to provide all requested details.** For your reference, attached are Elections Code sections 13107 and 13107.3, and 2 California Code of Regulations (CCR) section 20711. You may also wish to consult Elections Code section 13107.5 ("community volunteer") and 2 CCR sections 20712 - 20719 (found at [www.sos.ca.gov](http://www.sos.ca.gov)).

Justification for use of proposed ballot designation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Current or Most Recent Job Title: \_\_\_\_\_ Start/End Dates: \_\_\_\_\_

Employer Name or Business: \_\_\_\_\_

Person(s) who can verify this information:

Name(s): _____	Phone Number: _____
	E-Mail: _____
Name(s): _____	Phone Number: _____
	E-Mail: _____

Before signing below, answer the following questions.

Does your proposed ballot designation:

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

If the answer to any of these questions is "Yes," your proposed ballot designation is likely to be rejected.

Candidate's Signature \_\_\_\_\_ Date \_\_\_\_\_

# Statement of Economic Interests Form 700

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All candidates, including incumbents, must file a candidate type Statement of Economic Interests Form 700 (Form 700) when nomination documents are filed. The candidate shall disclose all investments, interests in real property, and business positions held on the date of filing nomination documents.

In addition, the candidate shall also disclose income (including loans, gifts, and travel payments) received during the 12 months before the filing date. The form shall be typed using the electronic PDF fillable form; handwritten forms shall not be accepted. A sample *Form 700* is included at the end of this section.

**Incumbents** may combine their candidate-type statement with the annual type statement required for their council seat (due on April 1). If filing a combined statement, confirmation of the NetFile electronic filing shall be submitted with nomination documents.

## COMPLETING AND FILING THE STATEMENT

The cover page of the *Form 700* shall have all sections completed. The City Clerk's Office prepopulates sections one, two, and three. The candidate shall add their name at the top and complete sections four and five. Section four lists all schedules for the form. The candidate should check the box next to each schedule they have reportable interests for and attach the corresponding completed schedule to the cover sheet. The "None - No reportable interests on any schedule" box should be checked if a candidate has no schedules to complete. Section five is the candidate's verification information and signature.

After nomination documents are submitted, the City Clerk shall make and retain a copy of the *Form 700* and forward the original to the State Fair Political Practices Commission (FPPC), the official filing officer for the *Form 700*.

## FUTURE FILINGS

If a candidate is successful, they shall be required to file an assuming-type statement within 30 days of being sworn into office. This does not apply if the successful candidate is the incumbent. Office holders who leave office shall file a leaving type statement within 30 days of leaving office. In addition, an annual type statement shall be required by April 1 each year for the duration of holding office. Office holders appointed to joint power authorities who require the *Form 700* shall also be required to file assuming and annual type statements with those agencies' filing officers.

# Statement of Economic Interests Form 700

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION  
A PUBLIC DOCUMENT

## STATEMENT OF ECONOMIC INTERESTS

Date Initial Filing Received  
Official Use Only

### COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

#### 1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_

Position: \_\_\_\_\_

#### 2. Jurisdiction of Office (Check at least one box)

State

Judge or Court Commissioner (Statewide Jurisdiction)

Multi-County \_\_\_\_\_

County of \_\_\_\_\_

City of \_\_\_\_\_

Other \_\_\_\_\_

#### 3. Type of Statement (Check at least one box)

Annual: The period covered is January 1, 2016, through December 31, 2016.

Leaving Office: Date Left \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
(Check one)

-or-  
The period covered is \_\_\_\_ / \_\_\_\_ / \_\_\_\_ through December 31, 2016.

The period covered is January 1, 2016, through the date of leaving office.

Assuming Office: Date assumed \_\_\_\_ / \_\_\_\_ / \_\_\_\_

The period covered is \_\_\_\_ / \_\_\_\_ / \_\_\_\_ through the date of leaving office.

Candidate: Election year \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

#### 4. Schedule Summary (must complete) ► Total number of pages including this cover page: \_\_\_\_\_

##### Schedules attached

Schedule A-1 - Investments - schedule attached  
 Schedule A-2 - Investments - schedule attached  
 Schedule B - Real Property - schedule attached

Schedule C - Income, Loans, & Business Positions - schedule attached  
 Schedule D - Income - Gifts - schedule attached  
 Schedule E - Income - Gifts - Travel Payments - schedule attached

-or-

None - No reportable interests on any schedule

#### 5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER ( ) E-MAIL ADDRESS \_\_\_\_\_

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed \_\_\_\_\_  
(month, day, year)

Signature \_\_\_\_\_  
(File the originally signed statement with your filing official.)

FPPC Form 700 (2016/2017)  
FPPC Advice Email: advice@fppc.ca.gov  
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

# Statement of Economic Interests Form 700

## SCHEDULE A-2 Investments, Income, and Assets of Business Entities/Trusts (Ownership Interest is 10% or Greater)

CALIFORNIA FORM **700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

### ► 1. BUSINESS ENTITY OR TRUST

Name \_\_\_\_\_

Address (Business Address Acceptable)

Check one

Trust, go to 2    Business Entity, complete the box, then go to 2

#### GENERAL DESCRIPTION OF THIS BUSINESS

##### FAIR MARKET VALUE

- \$0 - \$1,999
- \$2,000 - \$10,000
- \$10,001 - \$100,000
- \$100,001 - \$1,000,000
- Over \$1,000,000

##### IF APPLICABLE, LIST DATE:

\_\_\_\_ / **16** / \_\_\_\_    ACQUIRED    DISPOSED

##### NATURE OF INVESTMENT

- Partnership    Sole Proprietorship    \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

### ► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- \$0 - \$499    \$10,001 - \$100,000
- \$500 - \$1,000    OVER \$100,000
- \$1,001 - \$10,000

##### IF APPLICABLE, LIST DATE:

\_\_\_\_ / **16** / \_\_\_\_    ACQUIRED    DISPOSED

### ► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

None or  Names listed below

### ► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

- INVESTMENT    REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

##### FAIR MARKET VALUE

- \$2,000 - \$10,000
- \$10,001 - \$100,000
- \$100,001 - \$1,000,000
- Over \$1,000,000

##### IF APPLICABLE, LIST DATE:

\_\_\_\_ / **16** / \_\_\_\_    ACQUIRED    DISPOSED

##### NATURE OF INTEREST

- Property Ownership/Deed of Trust    Stock    Partnership

Leasehold \_\_\_\_\_    Other \_\_\_\_\_

Check box if additional schedules reporting investments or real property are attached

### ► 1. BUSINESS ENTITY OR TRUST

Name \_\_\_\_\_

Address (Business Address Acceptable)

Check one

Trust, go to 2    Business Entity, complete the box, then go to 2

#### GENERAL DESCRIPTION OF THIS BUSINESS

##### FAIR MARKET VALUE

- \$0 - \$1,999
- \$2,000 - \$10,000
- \$10,001 - \$100,000
- \$100,001 - \$1,000,000
- Over \$1,000,000

##### IF APPLICABLE, LIST DATE:

\_\_\_\_ / **16** / \_\_\_\_    ACQUIRED    DISPOSED

##### NATURE OF INVESTMENT

- Partnership    Sole Proprietorship    \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

### ► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)

- \$0 - \$499    \$10,001 - \$100,000
- \$500 - \$1,000    OVER \$100,000
- \$1,001 - \$10,000

### ► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)

None or  Names listed below

### ► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST

Check one box:

- INVESTMENT    REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

##### FAIR MARKET VALUE

- \$2,000 - \$10,000
- \$10,001 - \$100,000
- \$100,001 - \$1,000,000
- Over \$1,000,000

##### IF APPLICABLE, LIST DATE:

\_\_\_\_ / **16** / \_\_\_\_    ACQUIRED    DISPOSED

##### NATURE OF INTEREST

- Property Ownership/Deed of Trust    Stock    Partnership

Leasehold \_\_\_\_\_    Other \_\_\_\_\_

Check box if additional schedules reporting investments or real property are attached

Comments:

FPPC Form 700 (2016/2017) Sch. A-2

FPPC Advice Email: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

FPPC Toll-Free Helpline: 866/275-3772 [www.fppc.ca.gov](http://www.fppc.ca.gov)

# Statement of Economic Interests Form 700

## SCHEDULE C Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM **700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

### ► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary  Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or  Rental Income, list each source of \$10,000 or more

(Describe)

Other \_\_\_\_\_  
(Describe)

### ► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary  Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or  Rental Income, list each source of \$10,000 or more

(Describe)

Other \_\_\_\_\_  
(Describe)

### ► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

\* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\*

INTEREST RATE

TERM (Months/Years)

\_\_\_\_\_ %  None

SECURITY FOR LOAN

None  Personal residence

Real Property \_\_\_\_\_ Street address \_\_\_\_\_

City \_\_\_\_\_

Guarantor \_\_\_\_\_

Other \_\_\_\_\_  
(Describe)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

Comments: \_\_\_\_\_

FPPC Form 700 (2016/2017) Sch. C  
FPPC Advice Email: advice@fppc.ca.gov  
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

# Candidate Statement

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The *Candidate Statement Form* shall be submitted with nomination documents, even if a candidate does not submit a statement. If no statement is being submitted, the candidate shall select the check box next to "I do not wish to submit a candidate statement."

The candidate statement is optional, allowing candidates to share additional descriptive and qualitative information about themselves. Candidate statements are printed in the official sample ballot in English, Spanish, and Chinese and provided to all voters.

The form shall be typed using the electronic fillable form; handwritten forms shall not be accepted. In addition, the text of the statement shall be provided electronically in an editable format via email to [cityclerk@morganhill.ca.gov](mailto:cityclerk@morganhill.ca.gov). A sample *Candidate Statement Form* is included at the end of this section.

## COST OF STATEMENT

If a candidate elects to submit a statement, a payment shall be made for half the estimated cost due when filing nomination documents. Because the cost of each candidate statement is prorated among those who submit statements and the number of registered voters in that district, the exact amount cannot be determined until after the election. Therefore, the amount paid is an estimate. If the final cost is less than the estimate, the candidate shall be refunded the difference. If the final cost is more than the estimate, the candidate will be required to pay the remaining balance.

## INDIGENCE

If a candidate elects to have a candidate statement and cannot pay for it when filing nomination documents, they may claim indigence. All claims of indigence are reviewed by the Office of the City Clerk and City Attorney for acceptance. If indigence is verified, the claim shall be accepted, and the City will bear the full cost of the candidate statement.

If the candidate wishes to claim indigence, a *Waiver of Candidate Statement Deposit Form*, *Statement of Financial Worth*, and a copy of their most recent federal tax filing shall be submitted with nomination documents. A sample *Waiver of Candidate Statement Deposit Form* and *Statement of Financial Worth* are included at the end of this section.

If indigence status is denied, the candidate shall have three business days from the date of denial notification to submit payment or the statement shall be withdrawn.

# Candidate Statement

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The candidate shall be notified if indigence is granted, and the payment shall be postponed until after the election. The candidate shall be required to pay the actual candidate statement cost billed by the County.

## WORD COUNT

The candidate statement is limited to 200 words, comprised of no more than five paragraphs. Pursuant to the Elections Code, punctuation is not counted, and each word shall be counted as one word except as specified below:

- All geographical names shall be considered one word; for example, "City and County of San Francisco" shall be counted as one word.
- Each abbreviation for a word, phrase, or expression shall be counted as one word.
- Telephone numbers shall be counted as one word.
- Hyphenated words appearing in any generally available standard reference dictionary, published in the United States at any time within the ten calendar years immediately preceding the election for which the words are counted, shall be considered one word. Each part of all other hyphenated words shall be counted as a separate word.
- Dates consisting of a combination of words and digits shall be counted as two words. Dates consisting only of a combination of digits shall be counted as one word.
- Any number consisting of a digit or digits shall be considered one word. Any number that is spelled, such as "one," shall be considered as a separate word or words. For example: "one" shall be counted as one word, whereas "one hundred" shall be counted as two words. "100" shall be counted as one word.
- Internet website addresses shall be counted as one word.

Once the statement is submitted, no editing shall be done by the City Clerk's Office. Statements that exceed 200 words in length shall be shortened by City Clerk staff by removing words from the end of the statement until the word limit is reached.

# Candidate Statement

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It is recommended that care be taken to ensure that the word limit is not exceeded. Candidates are encouraged to request a review of the statement word count and format with the City Clerk's Office before submission of nomination documents.

## STATEMENT CONTENT

The candidate statement shall not include the candidate's party affiliation nor membership or activity in partisan political organizations. If the statement contains the name of an endorsee, the candidate shall submit written approval from that individual to use their name in the statement. When a quote is used, the candidate shall provide the original document in which the quote was printed or a signed statement from the quoted person.

In addition, the statement shall not in any way refer to other candidates for that office or to another candidate's qualifications, character, or activities. Statement authors may be held liable for any false, slanderous, or libelous statements offered for printing or contained in the official sample ballot. The City Clerk shall reject any statement containing any obscene, vulgar, profane, scandalous, libelous or defamatory matter and any language or matter prohibited through the [US Mail](#).

## Format

Elections Code provides that the statement of each candidate be printed in type that is of uniform size and darkness and with uniform spacing. Therefore, candidates may not use:

- Underlining (including publication names or titles referenced)
- ALL CAPS
- Any form of emphasis such as *italics*, **bold print**, dashes (-), bullets (●), stars (\*), etc.
- Multiple punctuation ("....." or "-----" or "!!!!!!")

In addition to the word count limit, statements are limited to a maximum of five paragraphs for the statement to fit onto a single page in the official sample ballot. The statement shall be written in first person tense and limited to the candidate's background and qualifications.

# Candidate Statement

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## **WITHDRAWAL OF STATEMENT**

A candidate statement may be withdrawn, but not altered, up to 5:00 p.m. on the first working day following the close of the nomination period.

## **CONFIDENTIALITY**

Candidate statements submitted shall remain confidential until 5:00 p.m. on the close of the nomination period. The statement shall then become a public record.

# Candidate Statement

Election Date: November 3, 2020 Presidential General Election

## RULES FOR COUNTING WORDS IN CANDIDATE STATEMENTS

(Elections Code § 9)

The candidate statement heading includes the candidate's name (required), age (optional), and occupation (optional). These words, however, do not count toward the number of words allowed for the statement. All statements will begin with the words: "Education and Qualifications:" followed by the text filed by the candidate.

The "Occupation" field in the candidate's statement is NOT governed by the same laws pertaining to the ballot designation; therefore, it may be different. However, if its length exceeds one line, the additional words will be counted towards the final word-limit.

Words will be counted according to the following guidelines:

Each word shall be counted as one word except as specified in this section.

All proper nouns, including geographical names, shall be considered as one word; for example, "City and County of San Francisco" shall be counted as one word.

Each abbreviation for a word, phrase, or expression shall be counted as 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; for example, "mother-in-law", "first-rate", "one-time" will be counted as one word. Each part of all other hyphenated words shall be counted as a separate word; for example, "one-half," "local-area," and "home-page" will be counted as two words.

Dates shall be counted as one word.

Any number consisting of a digit or digits shall be considered as one word. For example, "100" shall be counted as one word.

Any number which is spelled out shall be considered as a separate word or words. For example, "One" shall be counted as one word whereas "one hundred" shall be counted as two words.

Telephone numbers shall be counted as one word.

A website address (URL) shall be counted as one word.

Punctuation shall not be counted.

Additionally:

Characters used in place of a word or number and that stand alone, such as "&", "\$", "%", or "#" shall be counted as one word.

Characters used in conjunction with a number and necessary to combine, such as "\$100" or "100%" are not counted. For examples, "\$100" is counted as one word, while "#voteforme" would be counted as three separate words (# not counted).

If the text exceeds the word or line limit, the author will be asked to amend their statement to bring it within the required word or line limit.

This section shall not apply to counting words for ballot designations under Elections Code § 13107.

# Candidate Statement

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Election Date: November 3, 2020 Presidential General Election

## CANDIDATE STATEMENT FORMAT GUIDES

Candidate statements are printed in the county voter information guide in block paragraph format. To ensure uniformity, candidate statements must follow the guidelines below:

Typewritten (or computer printed) in single-spaced paragraph format with upper/lower-case letters.  
In a standard font size, spacing and darkness, and DOES NOT contain any of the following:

- Bullets (\*)
- Numbering (1,2,3)
- Special Characters (#@&)
- All CAPITAL Letters
- Underlining
- Bold Face**
- Italics*

Proofread for errors in spelling, punctuation and grammar. Statements will appear in the county voter information guide exactly as submitted by the candidate. *Corrections or changes to content and format will not be allowed after the statement has been filed* unless ordered by a court of law.

Within the word/line/spacing format limits. A 200-word statement has a maximum of 22-lines with approximately 72-characters per line. A 400-word statement has a maximum of 44-lines, with the same character limit. Using a computer to determine a statement's word count is not recommended. Please refer to "Rules for Counting Words" for guidelines on how to determine word counts. In addition, when translated into other languages, the amount of text can increase up to 30 percent in size from the original statement.

# Candidate Statement

## CANDIDATE STATEMENT OF QUALIFICATIONS

Election Date: November 3, 2020 Presidential General Election

Candidate Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	OFFICE USE ONLY
	FIRST	MIDDLE (do not include hyphenated last name)	LAST (include all or hyphenated last names)	
Office Sought	<input type="text" value="Select from Drop Down Menu..."/>			Words <input type="text"/>
Jurisdiction	<input type="text"/>			Lines <input type="text"/>
I understand my name will be transliterated. For proper transliteration, my name is:				
<input type="checkbox"/> Masculine	<input type="checkbox"/> Feminine			
<input type="checkbox"/> Transgender Masculine	<input type="checkbox"/> Transgender Feminine			
<input type="checkbox"/> Other: <input type="text"/>				
Statement of	<input type="text"/>			
Candidate for	<input type="text" value="Select from Drop Down Menu..."/>			
All Capital Letters & Bold ( statement o ( andidate name) and andidate or (o i e) as it will appear with statement in voter information guide)				
<input type="text"/>				
(Name of Jurisdiction)				

I understand that my name, occupation, and age, as listed above, will appear with my statement in the County Voter Information Guide. I also understand it may be formatted to conform with the RCV standards.

1. **What is the primary purpose of the proposed legislation?**

Signature of Candidate \_\_\_\_\_ Date \_\_\_\_\_

Email address (for 24 hour signoff of statement format):

\*\*\* CHECK BOX AND SIGN BELOW IF NOT ELECTING TO FILE A CANDIDATE STATEMENT \*\*\*

Page 11 of 11 | Last updated: 10/10/2017 | Page 11 of 11 | Last updated: 10/10/2017

Redacted content: [REDACTED]

**Signature of Candidate** \_\_\_\_\_ **Date** \_\_\_\_\_

Digitized by srujanika@gmail.com

# Candidate Statement

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17575 Peak Avenue  
Morgan Hill, CA 95037-4128  
TEL: (408) 779-7271  
FAX: (408) 779-3117  
[www.morganhill.ca.gov](http://www.morganhill.ca.gov)

## Waiver of Candidate Statement Deposit Form

*This form is only required by those who submit a candidate statement AND are declaring indigence.*

Name of Candidate: \_\_\_\_\_

Office Sought: \_\_\_\_\_

District (if applicable): \_\_\_\_\_

I, \_\_\_\_\_ do hereby declare that:

- I am a candidate for the City of Morgan Hill, Mayor or City Council member;
- I am unable to pay the required deposit due to my indigence. The attached *Statement of Financial Worth* is submitted to establish the facts of my financial status in the determination of my indigence;
- I understand the estimated cost of the candidate statement is \$\_\_\_\_\_;
- I understand if indigent status is granted, this waives my requirement to pay the fee; and
- I understand if indigent status is denied, I have three days to pay the estimated cost of the candidate statement or my statement will be withdrawn.

*I declare under penalty and perjury that the contents of this declaration are true and correct to the best of my knowledge.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Candidate Statement

---

## STATEMENT OF FINANCIAL WORTH

### AFFIDAVIT OF FINANCIAL WORTH IN SUPPORT OF APPLICATION TO FILE CANDIDATE'S STATEMENT WITHOUT ADVANCE PAYMENT OF ESTIMATED COSTS

#### NOTICE TO CANDIDATE:

This Office will review and make a final determination of your eligibility as an indigent as soon as possible after submittal of this form.

If this Office determines that you are not indigent, you will be notified of this finding. Within three days of notification, excluding Saturdays, Sundays, and state holidays, you must either withdraw your statement or pay the requisite estimated cost. If you fail to respond within the time prescribed, this office will not print and mail the statement.

If it is determined that you are indigent this office shall print and mail the statement without requesting payment of the estimated cost. This, however, does not relieve you of your obligation to pay the candidate statement cost in the manner established by this Office.

#### PLEASE TYPE OR PRINT LEGIBLY

I, \_\_\_\_\_ state that I am unable to pay in advance the \$ \_\_\_\_\_ estimated cost required by the Election  
Official of **MORGAN HILL** to file a Candidate Statement for the office of \_\_\_\_\_  
to be printed and distributed to the voters at the election to be held on **November 6, 2018**.

I further swear or affirm that the responses which I have made to the questions and instructions below relating to my ability to pay said cost are true.

1. Social Security No. \_\_\_\_\_

2. Driver's License No. \_\_\_\_\_

3. Name, address and telephone of your employer.

Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_

4. Occupation \_\_\_\_\_

Gross Monthly Income \_\_\_\_\_

5. Other Sources of Income (Rents, interest, dividends, etc.) and monthly amount from each.

6. Ownership of real estate, stocks, bonds, notes, autos and \$ value of each listed.

7. Banking institutions name, address, account number, value of each account.

# Candidate Statement

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## STATEMENT OF FINANCIAL WORTH (continued)

8. List the individuals who are dependent upon you for your support. State their age and your relationship to those individuals.

I understand that this affidavit will be referred to this Office for a determination of indigency. I understand that if I am found to be indigent I am obligated to pay the Candidate Statement cost in the manner established by this Office. I further understand that if this Office determines that I am not indigent I must either pay the requisite cost or withdraw the statement within the time prescribed by law.

I agree to release a signed copy of my most recent federal income tax report.

I certify (or declare) under the penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed by me at \_\_\_\_\_, California this \_\_\_\_\_  
day of \_\_\_\_\_.

\_\_\_\_\_  
Name of Candidate

\_\_\_\_\_  
Signature of Candidate

\_\_\_\_\_  
Residence Address

\_\_\_\_\_  
Home Phone / Work Phone

FOR OFFICIAL USE ONLY:			
Determination:	Indigent	Must Pay in Advance	
Date:			

# Code of Fair Campaign Practices

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Pursuant to Elections Code Section 5.20400, the Code of Fair Campaign Practices is a voluntary pledge the candidate may enter into regarding their campaign. The basis of this pledge is an acknowledgment by the candidate to uphold the basic principles of decency, honesty, and fairness in the conduct of an election campaign. Candidates who elect to subscribe to this Code shall submit the *Code of Fair Campaign Practices* with nomination documents. A sample *Code of Fair Campaign Practices* is included at the end of this section.

By submitting the form, the candidate is pledging to follow the rules of conduct outlined in the Code. The rules of conduct include but are not limited to conducting an open and public campaign; not defaming the character of any candidate; not using dishonest or unethical practices; not coercing contributions from employees; upholding the electoral process; identifying candidate and/or committee as the sender of campaign advertising; and providing to the candidate's opponent and the city clerk, any campaign advertising or communication which directly names or refers to an opponent eight days before dissemination of the advertising or communication.

## APPLICABILITY OF PROVISIONS 5 AND 9 OF THE CODE

Provision 5 of the *Code of Fair Campaign Practices* states:

(5) I SHALL provide to my opponents, at the addresses on their Code of Fair Campaign Practices form, and to the City Clerk for public inspection, any campaign advertising or communication which directly names or refers to any of my opponents at least eight days before dissemination of the advertising or communication by me or my controlled committee.

Provision 9 of the *Code of Fair Campaign Practices* states:

(9) I SHALL clearly identify myself or my controlled committee as the sender of all campaign advertising to be mailed.

Section 1.20.040 of the City Code provides that provisions 5 and 9 are **not applicable** if all candidates for a particular office **do not** subscribe to the Code.

# Code of Fair Campaign Practices

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It is important to recognize that the Political Reform Act requires a candidate or a candidate's controlled committee to be identified as the sender of various campaign communications (e.g., contribution solicitations and mass mailings). Although provision 9 suggests that the candidate may not be required to identify themselves as the sender of campaign advertising, the Political Reform Act requires this identification. Additional details can be found in Chapter Three of *Campaign Disclosure Manual 2*.

# Code of Fair Campaign Practices

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## CODE OF FAIR CAMPAIGN PRACTICES

There are basic principles of decency, honesty, and fair play which every candidate for public office in the State of California has a moral obligation to observe and uphold in order that, after vigorously contested but fairly conducted campaigns, our citizens may exercise their constitutional right to a free and untrammeled choice and the will of the people may be fully and clearly expressed on the issues.

### THEREFORE:

- (1) **I SHALL CONDUCT** my campaign openly and publicly, discussing the issues as I see them, presenting my record and policies with sincerity and frankness, and criticizing without fear or favor the record and policies of my opponents or political parties that merit this criticism.
- (2) **I SHALL NOT USE OR PERMIT** the use of character defamation, whispering campaigns, libel, slander, or scurrilous attacks on any candidate or his or her personal or family life.
- (3) **I SHALL NOT USE OR PERMIT** any appeal to negative prejudice based on a candidate's actual or perceived race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, age, sexual orientation, sex, including gender identity, or any other characteristic set forth in Section 12940 of the Government Code, or association with another person who has any of the actual or perceived characteristics set forth in Section 12940 of the Government Code.
- (4) **I SHALL NOT USE OR PERMIT** any dishonest or unethical practice that tends to corrupt or undermine our American system of free elections, or that hampers or prevents the full and free expression of the will of the voters including acts intended to hinder or prevent any eligible person from registering to vote, enrolling to vote, or voting.
- (5) **I SHALL NOT** coerce election help or campaign contributions for myself or for any other candidate from my employees.
- (6) **I SHALL IMMEDIATELY AND PUBLICLY REPUDIATE** support deriving from any individual or group that resorts, on behalf of my candidacy or in opposition to that of my opponent, to the methods and tactics that I condemn. I shall accept responsibility to take firm action against any subordinate who violates any provision of this code or the laws governing elections.
- (7) **I SHALL DEFEND AND UPHOLD** the right of every qualified American voter to full and equal participation in the electoral process.

I, the undersigned, candidate for election to public office in the State of California or treasurer or chairperson of a committee making any independent expenditures, hereby voluntarily endorse, subscribe to, and solemnly pledge myself to conduct my campaign in accordance with the above principles and practices.

---

Signature

Date

---

Candidate's Name

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November 6, 2018

Date of Election

# Election Activities in General

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All candidates must file some level of campaign disclosure documents and/or reports. The Government Code requires these documents to provide the public with details on who contributes money or items to a candidate's campaign and how the candidate spends that money.

Disclosure requirements are very complicated. These instructions provide only basic guidelines on which forms to file and when. The City Clerk cannot render legal, accounting, or other professional advice. Candidates are responsible for ensuring they meet the legal requirements of state and local laws.

## GETTING STARTED

Prepared by the Fair Political Practices Commission (FPPC), *Campaign Disclosure Manual 2 – Information for Local Candidates* is the best resource for candidates regarding how to complete campaign reporting forms, establish a campaign committee, manage a campaign account, and what the Government Code requires of a candidate and committee treasurer. The manual is provided to candidates with nomination documents and is available on the [FPPC's website](#).

The FPPC is available by phone at 1-866-ASK-FPPC to help anyone with a reporting requirement under the Political Reform Act provisions of the Government Code. Advice hours are Monday through Thursday from 9:00 a.m. to 11:30 a.m.

In addition to state law, Morgan Hill Municipal Code section 1.16.050 provides for local campaign provisions. These provisions include filing campaign statements using the City's designated electronic filing system. The full text of City Code section 1.16.050 is available on the [City's website](#).

Candidates are encouraged to thoroughly read *Campaign Disclosure Manual 2* and applicable Municipal Code sections to ensure compliance with all provisions.

# Election Activities in General

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## Establishing a Bank Account

Candidates who anticipate soliciting or receiving contributions from others or anticipate spending over \$2,000 of personal funds in connection with the election shall open a campaign bank account. A candidate's personal funds used to pay for the candidate's statement do not count toward the \$2,000 threshold.

Campaign contributions may not be commingled with any individual's personal funds. All contributions shall be deposited in, and expenditures made from, the campaign bank account. Candidates may not re-use (or re-designate) a prior account for a future election. A new and separate bank account is required for each election. Additional details can be found in Chapter One of *Campaign Disclosure Manual 2*.

## **CAMPAIGN DISCLOSURE REPORTING FORMS**

The following section provides an overview of the required methods for filing, a review of various campaign reporting forms, and filing deadlines.

### Electronic Filing of Campaign Statements

The City of Morgan Hill requires the electronic filing of campaign statements using the City's designated electronic filing system. Exceptions to this rule include the *Form 501*, *Form 470(S)*, and *Form 410*. The City's electronic filing requirement of Forms 501, 470(S), and Form 410 is in addition to the state requirement to file an original signed statement. The electronic and original statements shall be received by the deadline to meet the filing requirement.

To help ensure reporting efficiency, the City provides candidates access to an internet-based electronic filing system. Candidates must utilize this system to create and submit statements filed with the Office of the City Clerk. Effective September 6, 2017, the Clerk no longer accepts paper filings of campaign statements (exception forms are Form 501, original Form 410, and Major Donor Form 461).

### Candidate Intention Statement (Form 501)

All candidates shall file a *Form 501* before soliciting or receiving contributions and before any campaign expenditure is made from personal funds. The only exception is when a candidate spends personal funds to pay for a candidate's statement that is submitted with the nomination documents.

# Election Activities in General

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This form is the first form filed by the candidate and is not filed using the City's electronic filing system. Only an original paper statement is required. The form shall be typed using the electronic PDF fillable form; handwritten forms shall not be accepted. Additional details on completing this form can be found in Chapter Four of *Campaign Disclosure Manual 2*.

## **Candidate Campaign Statement Short Form (Form 470)**

If a candidate does not anticipate raising or spending \$2,000 or more in a calendar year, the candidate may file a *Form 470*. Payments from the candidate's personal funds used to pay for a candidate's statement submitted with nomination documents do not count toward the \$2,000 threshold. This form shall be submitted when the candidate files nomination documents if the candidate has not formed a recipient committee. This form is not filed using the City's electronic filing system. Only an original paper statement is required. The form shall be typed using the electronic PDF fillable form; handwritten forms shall not be accepted. Additional details can be found in Chapter Four of *Campaign Disclosure Manual 2*.

If a *Form 470* is filed and \$2,000 or more is raised or spent later in the calendar year, the candidate's filing obligations and deadlines shall change. If this occurs, a *Form 470S* (supplemental) shall be filed with the City Clerk within 48 hours of reaching this threshold, and notification shall be sent to all candidates seeking the same office. The notice shall be sent by guaranteed overnight delivery, personal delivery, or fax. This form is not filed using the City's electronic filing system. Only an original paper statement is required. The form shall be typed using the electronic PDF fillable form; handwritten forms shall not be accepted.

In addition, a *Form 410* shall be filed, and the candidate shall begin filing detailed campaign statements using the *Form 460*. Additional details can be found in Chapter Four of *Campaign Disclosure Manual 2*.

## **Statement of Organization (Form 410)**

All candidates that receive \$2,000 or more in contributions in a calendar year qualify as a recipient committee and shall file a *Form 410*. The *Form 410* identifies the name of the committee, the treasurer and officers, and the committee's purpose. Candidates may not re-use (or re-designate) a prior committee for a future election. A new and separate committee is required for each election.

# Election Activities in General

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Within ten days of receiving \$2,000 or more, the candidate shall file an original Form 410 with the Secretary of State. The candidate shall include a \$50 payment to the Secretary of State. After that, the \$50 fee is due annually to the Secretary of State no later than January 15. Upon submission, the candidate shall be issued a committee ID number.

Immediately following, the candidate shall file a copy of the *Form 410* (with the committee ID number) with the Office of the City Clerk. Additional details can be found in Chapter Four of *Campaign Disclosure Manual 2*. Upon receipt of the initial *Form 410*, the Office of the City Clerk shall create a user account for the candidate to access the electronic filing system.

In addition, anytime a *Form 410* is submitted to the Secretary of State amending information the candidate shall file a copy of the amended statement with the Office of the City Clerk.

## **Recipient Committee Campaign Statement (Form 460)**

All candidates who qualify as a recipient committee shall file the *Form 460*. Annual statements, pre-election statements, and City supplemental statements are required. Government Code requires the continued filing of campaign statements until the committee has been terminated.

As disclosure requirements are complicated and lengthy, they have not been outlined in this manual. For details on how to complete the form, please refer to Chapter Six of *Campaign Disclosure Manual 2*. All *Form 460*'s shall be filed using the City's electronic filing system, in addition to the signed original statements.

## **24-hour Contribution Report (Form 497)**

Contributions made or received in aggregate of \$1000 or more during the 90 days preceding an election require filing *Form 497*. This form shall be filed within 24 hours of receiving the contribution. The most common reasons local candidates are required to file this form are the following:

- A contribution is **made** to a local candidate or ballot measure committee OR
- A contribution is **received** by a local candidate or ballot measure committee.

# Election Activities in General

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As the *Form 497* does not contain a signature field, only the electronic filing of this form is required. Additional details can be found in Chapter Seven of the *Campaign Disclosure Manual 2*.

## **Campaign Disclosure Reporting Deadlines**

Several campaign disclosure statements are required by candidates who qualify as a recipient committee. The reporting period of these statements is pursuant to the Government Code. Information regarding all filing deadlines and reporting periods pertaining to the upcoming election is included in Appendix D.

Candidates who do not qualify as a recipient committee and elect not to file the *Form 410* are only required to file the *Form 470* short form.

## **DEFEATED CANDIDATES/OUTGOING OFFICEHOLDERS**

After the election, unsuccessful candidates or defeated officeholders should begin reviewing their campaign funds and allowable uses and determine if their recipient committee should be terminated.

## **Surplus Funds**

Campaign funds held by a non-incumbent defeated candidate or a candidate who withdraws from an election become surplus at the end of the semi-annual reporting period following the election. For candidates involved in the June Primary election, funds would become surplus on June 30.

It is important to know when funds become surplus because the use of surplus funds is restricted. To ensure the proper disposition of campaign funds, individuals who fall into the above categories shall take action before the end of the applicable reporting period. Additional details on surplus funds can be found in Chapter Nine of *Campaign Disclosure Manual 2*.

## **Terminating a Recipient Committee**

When all financial obligations are met, the committee's account has been spent or distributed, and a candidate ceases to raise or spend additional funds, the committee should be terminated. An original *Form 410* shall be filed with the Secretary of State, Political Reform Division at 1500 11<sup>th</sup> Street, Room 495, Sacramento, CA 95814.

# Election Activities in General

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Immediately following, the candidate shall file a copy of the *Form 410* (with the committee ID number) with the Office of the City Clerk. Additional details can be found in Chapter Four of *Campaign Disclosure Manual 2*.

At the same time, the *Form 410* for termination is filed with the Office of the City Clerk, a termination *Form 460* shall also be filed, indicating a zero-cash balance. This final statement should report the committee's activity since the close of the reporting period of the previous statement filed.

## **Missing Contributor Information**

Be advised that the Political Reform Act requires that a contribution of \$100 or more be returned within 60 days of receipt if the candidate or committee has not obtained the contributor's name and address and, in the case of an individual contributor, their occupation and employer. Detailed record-keeping procedures can be found in Chapter Two of the *Campaign Disclosure Manual 2*.

## **November Election Period**

**November Election Period** – July 1 through December 31 of the election year.

Contributions received before committee qualification would be considered for purposes of the contribution limits and shall be reported and attributed to the appropriate period.

# Election Activities in General

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## CAMPAIGN SIGN REGULATIONS

Pursuant to the State Department of Transportation Outdoor Advertising Act, temporary political signs shall not be placed within the right-of-way of any highway or be visible within 660 feet from the edge of the right-of-way of a landscaped freeway.

State law directs the Department of Transportation to remove unauthorized temporary political signs and bill the responsible party for their removal.

In addition to State law, the City of Morgan Hill has adopted regulations about campaign signs. Regulations are summarized in the following sections; however, candidates are encouraged to review the full text of the City and County Code sections referenced below.

### **City of Morgan Hill**

[City of Morgan Hill Municipal Code](#) (Chapter 18.76.040(G) & 18.76.130(A))

### **Public Property**

Signs shall not be placed on any public property or within any public street or public right of way.

Public property on which signage is prohibited includes the following:

- Public Facilities. Examples include City Hall, the Community and Cultural Center, and the Centennial Recreation Center.
- Public Parks. Examples include Community Park and City-owned playgrounds.
- Center Median. These signs create a visual safety barrier between opposing lanes of traffic.
- Parkway Planting Strip. The City-owned planting area between the sidewalk and the street which is part of the City's right-of-way.
- Traffic Control Signals. Utility poles, parking meters, traffic signposts, and traffic signals. Section 21464 of the California Vehicle Code also prohibits posting on such traffic-control signs.
- City Street Barricades. Either permanent or temporary.
- Public Streets or Public Rights of Way. Publicly owned land that contains both the street and a strip of land on either side of the street that holds public facilities (sidewalks, sewers, storm drains, etc.).

# Election Activities in General

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Signs have an impact on the character, quality, and visual attractiveness of the community as well as on the safety of vehicular and pedestrian traffic. The restrictions on placement, number, and area of signs are adopted to prevent visual clutter, preserve the City's rural character and quality, and eliminate unnecessary distractions that may jeopardize pedestrian or vehicular traffic safety.

## Permission of Property Owner

No person shall erect, construct, or maintain any sign upon any property or building without the owner's consent or the person entitled to possession of the property or building, if any, or their authorized representatives.

## Temporary Signs 18.76.040(G))

Such signs may be single-faced or double-faced. In residential-zoned districts, each parcel may have up to four temporary signs, each sign not to exceed six square feet in area. In non-residential zoned districts, each parcel may have one temporary sign, not to exceed thirty-two square feet in area.

## Enforcement

Any signs placed in public areas or property shall be subject to removal by the City. The City will attempt to contact election officials during the initial collection of non-conforming signs. The City's Code Enforcement Officer will contact the property owner for any non-conforming signs identified on private property.

The City will store any removed signs for thirty (30) days at the Morgan Hill Corporation Yard. After such time, the signs will be subject to disposal. The City shall not be liable for the loss, destruction, or damage of any signs so removed and/or destroyed.

## Statement of Responsibility for Temporary Signs

All candidates shall complete and return the "Statement of Responsibility for Temporary Signs" form to the City Clerk upon submission of nomination documents.

# Election Activities in General

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## **POLITICAL ADVERTISING**

Pursuant to Elections Code section 20008, any paid political advertisement that refers to an election or any candidate for state or local elective office and that is contained in or distributed with a newspaper shall bear on each surface or page thereof, in type or lettering at least half as large as the type or lettering of the advertisement or in 10-point roman type, whichever is larger, the words "Paid Political Advertisement." The words shall be set apart from any other printed matter.

## **Mass Mailings**

As defined in Government Code section 82041.5, "Mass Mailing" means over 200 substantially similar pieces of mail but does not include a form letter or other mail that is sent in response to an unsolicited request, letter, or other inquiry.

Pursuant to Government Code section 84305:

(a) Except as provided in subdivision (b), no candidate or committee shall send a mass mailing unless the name, street address, and City of the candidate or committee are shown on the outside of each piece of mail in the mass mailing and on at least one of the inserts included within each piece of mail of the mailing in no less than 6-point type which shall be in a color or print which contrasts with the background to be easily legible. A post office box may be stated in lieu of a street address if the organization's address is a matter of public record with the Secretary of State.

(b) If the sender of the mass mailing is a single candidate or committee, the name, street address, and City of the candidate or committee need only be shown on the outside of each piece of mail.

(c) If the sender of a mass mailing is a controlled committee, the name of the person controlling the committee shall be included in addition to the information required by subdivision (a).

Pursuant to Government Code section 89001:

No newsletter or other mass mailing shall be sent at public expense.

# Election Activities in General

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## **FALSE OR MISLEADING INFORMATION**

Several unacceptable behaviors, considered to be false or misleading information to voters, are outlined in the Elections Code (EC) and summarized below. Candidates are encouraged to review the full text of the [Elections Code](#) to ensure compliance with all applicable provisions.

### **Ballot Designation (EC 13107)**

Elections officials shall not accept a ballot designation (defined in the Ballot Designation section of this guide) that would mislead voters.

### **Implied Status (EC 18350)**

Any person who intends to mislead the voters, assumes, pretends, or implies that they are the incumbent of a public office or acting in the capacity thereof is guilty of a misdemeanor.

### **Candidate Statement (EC 18351)**

Any candidate who knowingly makes a false statement in a candidate's statement, intending to mislead the voters, is punishable by a fine not exceeding \$1,000.

### **Simulated Ballot (EC 0009)**

Any simulated ballot shall contain specific language as required by the Elections Code and state that it is not an official ballot but an unofficial, marked one. No simulated ballot shall contain any official seal or insignia of any public entity.

### **Identification of Voter Precinct (EC 18302)**

Every person who knowingly causes campaign literature to be mailed or distributed with an incorrect precinct polling place listed for that voter shall be guilty of a misdemeanor.

# Election Activities in General

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## **Political Cyberfraud (EC 18320)**

It is unlawful for a person to, with intent to mislead, deceive, or defraud, commit an act of political Cyberfraud. This includes willful acts concerning political websites and access, domain names, diverting or redirecting access, and preventing or denying exit from a site.

## **Superimposed Image of Candidate (EC 20010)**

No production, distribution, publication, or broadcast of campaign materials with actual malice containing a superimposed image of a candidate is permitted. Actual malice means with the knowledge that the person's image has been superimposed on a picture to create a false representation.

## **ELECTIONEERING ON ELECTION DAY**

Pursuant to Elections Code section 18370:

No person shall, within 100 feet of a voting center or an elections official's office on Election Day or at any time that a voter may be casting a ballot:

- (a) Circulate an initiative, referendum, recall, nomination petition, or any other petition;
- (b) Solicit a vote or speak to a voter about marking their ballot;
- (c) Place a sign relating to voters' qualifications or speak to a voter about their qualifications except as provided in Elections Code section 14240; or
- (d) Do any electioneering.

As used in this section, "100 feet of a voting center or an elections official's office" means 100 feet from the room or rooms where voters sign the roster and cast ballots. Any person who violates this section's provisions is guilty of a misdemeanor.

## **VOTER REGISTRATION INFORMATION**

The County of Santa Clara Registrar of Voters provides registered voter lists and reports that may assist the candidate during their run for city elective office. Additional information can be obtained from the County by calling (408) 299-8683 or visiting the [County's website](#).

# Election Activities in General

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If a candidate chooses to provide "Vote-by-Mail" voter applications, they are encouraged to thoroughly read Division 3, Chapter 1 of the Elections Code as it relates to Vote by Mail Application and Voting Procedures.

# Resources

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## CALIFORNIA LEGISLATIVE INFORMATION

The following link provides searchable text for all legislative codes relevant to California, including the Government and Elections Code.

<http://leginfo.legislature.ca.gov/faces/codes.xhtml>

## FAIR POLITICAL PRACTICES COMMISSION (FPPC)

Campaign Disclosure Forms and Manuals: <http://www.fppc.ca.gov/index.php?id=633>

1102 Q Street, Suite 3000  
Sacramento, CA 95811  
Advice Line: 1 (866) 275-3772 \*2  
[advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Telephone Advice hours:  
9:00 a.m. – 11:30 a.m.  
Monday – Thursday

## CITY OF MORGAN HILL

Election Information: [www.morganhill.ca.gov/591/Elections](http://www.morganhill.ca.gov/591/Elections)  
Municipal Code: <http://www.morganhill.ca.gov/655/Municipal-Code>

### Office of the City Clerk

17575 Peak Avenue  
Morgan Hill, CA 95037  
(408) 779-7259  
[City Clerk email](mailto:City.Clerk@morganhill.ca.gov)

Office Hours:  
8:00 a.m. – 5:00 p.m.  
Monday – Friday

# Resources

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## COUNTY OF SANTA CLARA

Election Information: [www.sccgov.org/sites/rov/Pages/Registrar-of-voters.aspx](http://www.sccgov.org/sites/rov/Pages/Registrar-of-voters.aspx)

### Santa Clara County Registrar of Voters Office

1555 Berger Drive, Building 2 (Main Office)

San Jose, CA 95112

(408) 299-8683

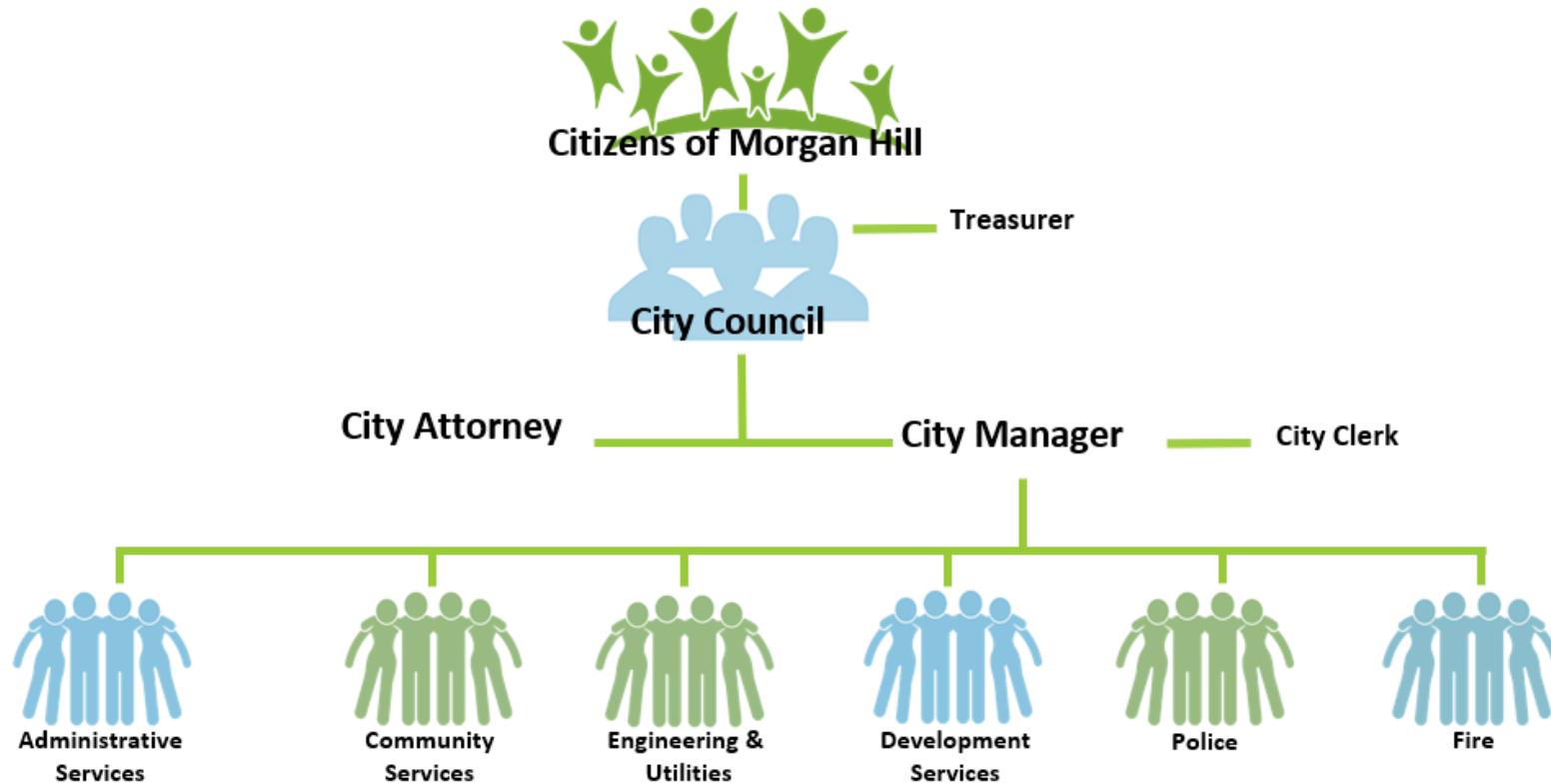
[registrar@rov.sccgov.org](mailto:registrar@rov.sccgov.org)

Office Hours:

8:00 a.m. – 5:00 p.m.

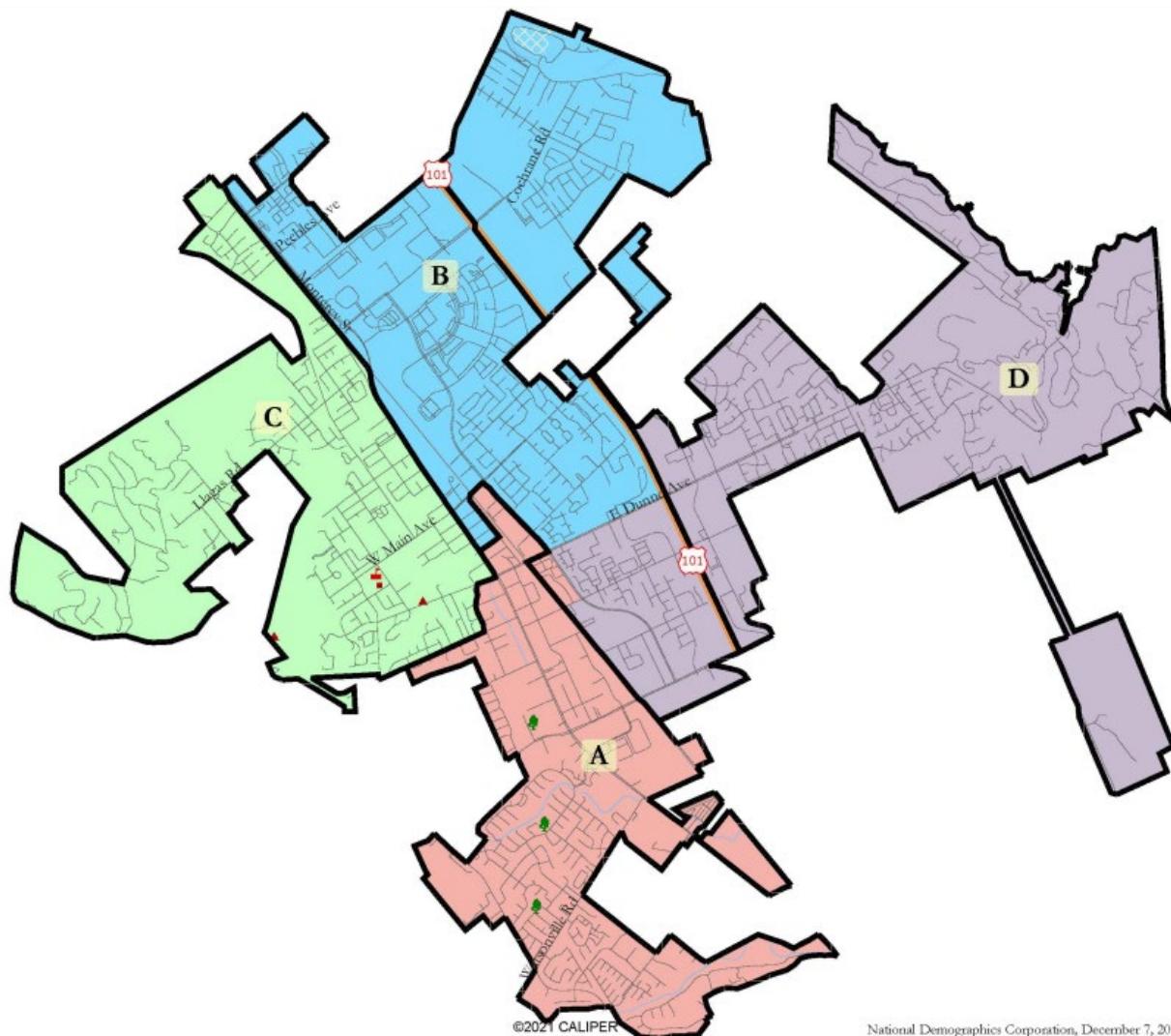
Monday - Friday

# City of Morgan Hill Organizational Chart



## Appendix B

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# Appendix C

## ORDINANCE NO. 1780, NEW SERIES

### AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF MORGAN HILL AMENDING TITLE I, CHAPTER 2, SECTIONS 2.04.020 AND 2.04.030 OF THE MORGAN HILL MUNICIPAL CODE TO ADJUST THE SALARIES OF COUNCIL MEMBERS AND THE MAYOR.

THE CITY COUNCIL OF THE CITY OF MORGAN HILL DOES HEREBY ORDAIN AS FOLLOWS:

**SECTION 1:** Amending Title I, Chapter 2, Section 2.04.020 of the Municipal Code.

The present Section 2.04.020 of Chapter 2 of Title I of the Municipal Code is amended to read as follows:

“Section 2.04.020      Salary of council members.

Pursuant to the provisions of Section 36516 of the Government Code, each of the members of the city council shall receive a monthly salary of three hundred thirteen dollars payable at the same intervals as other city employees are paid. This amount was calculated by first taking the existing monthly city councilmember salary of \$300 and increasing this amount by the 2.5% “change in the consumer price index for urban wage earners and clerical workers” for the San Francisco-Oakland-San Jose, California local area for the year ended December 2004, and then by increasing that product by the 1.7% “change in the consumer price index for urban wage earners and clerical workers” for the San Francisco-Oakland-San Jose, California local area for the year ended December 2005.

Pursuant to Section 36516.5 of the Government Code, this section shall take effect whenever one or more members of the city council begins a new term of office, after the adoption of the ordinance codified in this section.

**SECTION 2:** Amending Title I, Chapter 2, Section 2.04.030 of the Municipal Code.

The present Section 2.04.030 of Chapter 2 of Title I of the Municipal Code is amended to read as follows:

“Section 2.04.030      Salary of the mayor.

Pursuant to the provisions of Section 36516.1 of the Government Code, which permits a mayor elected pursuant to Sections 34900 to 34904, inclusive, of the Government Code to be provided with compensation in addition to that which he or she receives as a councilmember, the mayor of the city shall receive a monthly salary of five hundred twenty-one dollars payable at the same intervals as other city employees are paid. This amount was calculated by taking the existing monthly incremental mayoral salary of \$500 and increasing this amount by the 2.5% “change in the consumer price index for urban wage earners and clerical workers” for the year ended December 2004, and then by increasing that product by the 1.7% “change in the consumer price index for urban wage earners and clerical workers” for the year ended December 2005. This salary is to be paid in addition to the amount specified in Section 2.04.020 (Salary of council members).

# Appendix C

City of Morgan Hill  
Ordinance No. 1780, New Series  
Page 2 of 2

Pursuant to Section 36516.5 of the Government Code, this section shall take effect whenever one or more members of the city council begins a new term of office, after the adoption of the ordinance codified in this section.

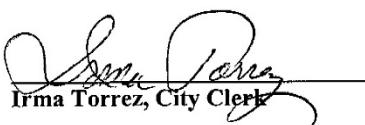
**SECTION 4.** Severability. If any part of this Ordinance is held to be invalid or inapplicable to any situation by a court of competent jurisdiction, such decision shall not affect the validity of the remaining portions of this Ordinance or the applicability of this Ordinance to other situations.

**SECTION 5.** Effective Date Publication. This ordinance shall take effect thirty (30) days after the date of its adoption. The City Clerk is hereby directed to publish this ordinance pursuant to §36933 of the Government Code.

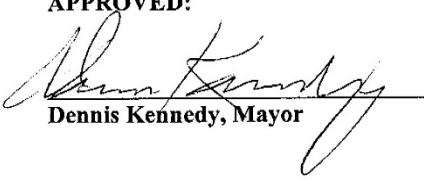
The foregoing ordinance was introduced at the regular meeting of the City Council of the City of Morgan Hill held on the 7<sup>th</sup> Day of June 2006, and was finally adopted at a regular meeting of said Council on the 21<sup>st</sup> Day of June 2006, and said ordinance was duly passed and adopted in accordance with law by the following vote:

**AYES:** COUNCIL MEMBERS: Larry Carr, Mark Grzan, Dennis Kennedy,  
Greg Sellers, Steve Tate  
**NOES:** COUNCIL MEMBERS: None  
**ABSTAIN:** COUNCIL MEMBERS: None  
**ABSENT:** COUNCIL MEMBERS: None

ATTEST:

  
Irma Torrez, City Clerk

APPROVED:

  
Dennis Kennedy, Mayor

## **☒ CERTIFICATE OF THE CITY CLERK ☒**

I, IRMA TORREZ, CITY CLERK OF THE CITY OF MORGAN HILL, CALIFORNIA, do hereby certify that the foregoing is a true and correct copy of Ordinance No. 1780, New Series, adopted by the City Council of the City of Morgan Hill, California at their regular meeting held on the 21<sup>st</sup> Day of June 2006.

WITNESS MY HAND AND THE SEAL OF THE CITY OF MORGAN HILL.

DATE: 7/5/06

  
IRMA TORREZ, City Clerk