

CONCURRENCE IN SENATE AMENDMENTS

CSA1 Bill Id:AB 699 Author:(Stefani)

As Amended Ver:September 5, 2025

Majority vote

SUMMARY

Requires, upon request, a local elections official to include on the ballot label, for certain local tax or bond measures, a statement directing voters to the county voter information guide for required tax rate information, in lieu of providing the information directly on the ballot label.

Senate Amendments

- 1) Revise the text of the statement that may appear on the ballot label directing voters to the county voter information guide, in lieu of providing the tax rate information directly on the ballot label, so that the phrase will be one of the following:
 - a) For a measure that authorizes the issuance of bonds to be repaid from ad valorem property taxes: "See county voter guide for how property taxes repay bonds."
 - b) For a measure that authorizes the issuance of bonds to be repaid from a source other than ad valorem property taxes: "See county voter guide for how the bonds are repaid."
 - c) For a measure that imposes or increases a tax with more than one rate and does not authorize the issuance of bonds: "See county voter guide for detailed tax rate information."
- 2) Make conforming changes.

COMMENTS

In 2015, the Legislature passed and the Governor signed AB 809 (Obernolte), Chapter 337, Statutes of 2015, which required the ballot, if a proposed local initiative imposed a tax or raised the rate of a tax, to include in the statement of the ordinance on the ballot the amount of money to be raised annually and the rate and duration of the tax to be levied. AB 809 took effect in January 2016. Subsequently AB 195 (Obernolte), Chapter 105, Statutes of 2017 clarified that the ballot label requirements of AB 809 applied to all local tax measures placed on the ballot, not only initiative tax measures.

This bill alters the information voters see on the ballot label for local measures that impose or increase a tax for more than one rate, or authorize the issuance of bonds, and changes the information included in the measure information statement. Specifically, this bill permits the jurisdiction submitting the measure, or the proponents in the case of a voter-submitted initiative, to choose whether to include the current tax rate information required by AB 809 and AB 195 in the ballot label, or to instead include a phrase that directs the voter to the county voter information guide for information about the tax rate, or for information about how the bond debt will be repaid, in lieu of providing the information directly on the ballot label. If a local agency or the proponents elect to tell voters to see the voter guide, this bill requires the election order for the measure, or the full text of the measure in the case of a voter-submitted initiative, to include a statement of the reasons for selecting the inclusion of the phrase. Additionally, this bill creates

new tax rate statement disclosure requirements if ballot measure proponents or a local agency choose to include the phrase on the ballot label, as specified.

The Senate amendments modify the text of the statement directing voters to the county voter information guide for information about the tax rate, or for information about how the bond debt will be repaid, that would appear in the ballot label in lieu of providing the information directly on the ballot label. This bill, as amended in the Senate, is consistent with prior Assembly actions.

Please see the policy committee analysis for a full discussion of this bill.

According to the Author

"Reducing tax and bond measures to be summarized in 75-words has led to lower passage rates and jurisdictions deciding not to go to the ballot at all. AB 699 addresses a serious problem in current law that inhibits local tax mechanisms that cannot be accurately explained in the 75-word ballot label. This bill is smart, good government policy that enhances transparency while ensuring local jurisdictions can continue to work in partnership with their local communities in support of vital infrastructure."

Arguments in Support

In support of a prior version of this bill, the Community College Facility Coalition wrote: "Recent changes to Elections Code Section 13119 require a local measure that imposes or increases a tax, including local school bond measures, to include on the 75-word ballot label the rate and duration of a tax, and the amount of money to be raised annually. While these provisions were enacted with the intention of increasing transparency by showing voters the costs of proposed ballot measures, they actually result in less transparency because of voter confusion...AB 699 will improve transparency and create new financial disclosures, so that voters better understand the impact a bond measure may have. It allows local agencies proposing bonds to select an alternative financial disclosure option. Instead of providing the rate, duration, and annual revenue figures on the ballot label, a local agency could include a statement on the ballot label directing voters to the voter guide for 'detailed tax rate information.'"

Arguments in Opposition

In opposition to a prior version of this bill, SHIFT-Bay Area, wrote: "For many, the ballot label is the only thing a voter reads before making their decision; having easy access to this critical information is imperative. We believe that when faced with a tax that could last decades, voters should have access to as much information as possible. Relegating this information to the separately mailed voter guide, or to a rarely viewed web page, constitutes a willful, knowing reduction in transparency for local tax and bond measures."

FISCAL COMMENTS

According to the Senate Appropriations Committee, unknown, potentially significant state-mandated local costs for elections officials to prepare and send measure information statements to voters. Actual costs would depend upon how many proponents of local multi-tiered tax and bond measures opt to include financial impact information in the voter information guide, and would vary among the state's 58 counties. These costs are likely to be state-reimbursable, subject to a determination by the Commission on State Mandates.

VOTES:**ASM ELECTIONS: 4-2-1****YES:** Pellerin, Berman, Solache, Stefani**NO:** Macedo, Lackey**ABS, ABST OR NV:** Bennett**ASM APPROPRIATIONS: 11-3-1****YES:** Wicks, Arambula, Calderon, Caloza, Elhawary, Fong, Mark González, Hart, Pacheco, Pellerin, Solache**NO:** Dixon, Ta, Tangipa**ABS, ABST OR NV:** Sanchez**ASSEMBLY FLOOR: 54-20-5****YES:** Addis, Aguiar-Curry, Ahrens, Alvarez, Arambula, Ávila Farías, Bauer-Kahan, Bennett, Berman, Boerner, Bonta, Bryan, Calderon, Caloza, Carrillo, Connolly, Elhawary, Fong, Gabriel, Garcia, Gipson, Mark González, Haney, Harabedian, Hart, Irwin, Jackson, Kalra, Krell, Lee, Lowenthal, McKinnor, Muratsuchi, Nguyen, Pacheco, Papan, Pellerin, Quirk-Silva, Ransom, Celeste Rodriguez, Michelle Rodriguez, Rogers, Blanca Rubio, Schultz, Sharp-Collins, Solache, Soria, Stefani, Valencia, Ward, Wicks, Wilson, Zbur, Rivas**NO:** Alanis, Bains, Castillo, Chen, Davies, DeMaio, Dixon, Ellis, Gallagher, Jeff Gonzalez, Hadwick, Hoover, Lackey, Macedo, Patterson, Petrie-Norris, Sanchez, Ta, Tangipa, Wallis**ABS, ABST OR NV:** Flora, Ortega, Patel, Ramos, Schiavo**UPDATED**

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