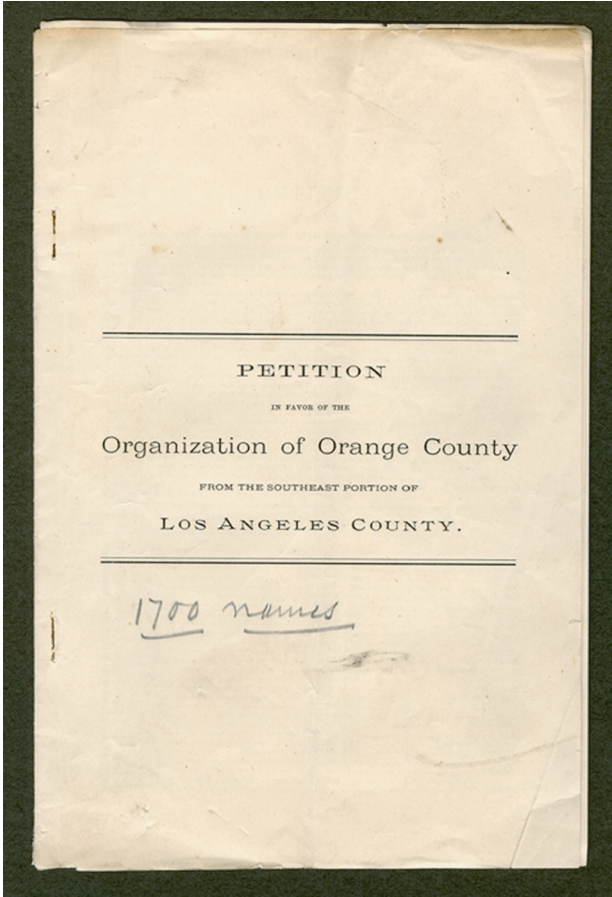


HANDBOOK ON THE COUNTYWIDE INITIATIVE PROCESS



THIS COUNTYWIDE INITIATIVE PROCESS HANDBOOK IS INTENDED TO PROVIDE GENERAL INFORMATION, AND DOES NOT HAVE THE FORCE AND EFFECT OF LAW. IT IS DISTRIBUTED WITH THE UNDERSTANDING THAT THE REGISTRAR OF VOTERS OF THE COUNTY OF ORANGE IS NOT RENDERING LEGAL ADVICE AND, THEREFORE, THE HANDBOOK IS NOT TO BE A SUBSTITUTE FOR LEGAL COUNSEL FOR THE INDIVIDUAL OR ORGANIZATION USING IT. IT IS THE RESPONSIBILITY OF THE PROPONENTS OF AN INITIATIVE EFFORT TO OBTAIN THE MOST UP-TO-DATE INFORMATION AVAILABLE, REFLECTING CHANGES IN LAWS OR PROCEDURE SUBSEQUENT TO THE PUBLICATION OF THIS GUIDE.

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WHAT IS AN INITIATIVE?

An initiative is the power of the electors to propose a new ordinance by which they will be governed. Any proposed ordinance may be submitted to the Board of Supervisors by filing an initiative petition with the Registrar of Voters (ROV) that is signed by the number of voters specified in the Elections Code. **Elec. Code §9101**

WHOM DO I CONTACT FOR INFORMATION ON COUNTYWIDE INITIATIVES?

The Registrar of Voters is the elections official in the case of the circulation and filing of a countywide initiative petition.

The City Clerk is the elections official in the case of a city initiative. Contact the City Clerk of the appropriate city for this information. You can find a contact list of city clerks on our website by visiting ocvote.gov.

HOW LONG WILL THE PROCESS TAKE?

- The clock starts ticking when the Notice of Intention is filed.
- To give you an idea of how long the process will take, an example of a timeline has been prepared. (See Exhibit B, page 22, of the handbook.)
- **This sample timeline is an example, and does not represent an exact timeline for your particular initiative.** It is provided to give you a general idea of the length of the process.

PHASE 1 -- GETTING STARTED

STEP 1...BE PREPARED!

- The Registrar of Voters (ROV) can provide you with helpful information to assist you in understanding the steps necessary to initiate, circulate, and file countywide initiative petitions.
- Become familiar with the process by reading this handbook, Elections Code Sections 9100 through 9190, and calling the ROV at (714) 567-7600, if you have specific questions.



All parties involved in a countywide initiative petition process are advised to seek legal counsel. It is incumbent upon proponents to follow the petition process as directed in the Elections Code.

STEP 2...NOTICE OF INTENTION

- You begin the countywide initiative process by filing with the ROV a Notice of Intention to circulate an initiative petition. Exhibit C, page 22, of this handbook, is an example of the Notice of Intention.
- The Notice of Intention must include the names and business or residence addresses of at least one but not more than five proponents of the petition and may include a printed statement, not exceeding 500 words in length, stating the reasons for the proposed petition. The ROV will verify the word count. See Exhibit D, page 23, for guidelines. **Elec. Code §§9103, 9104**



At the time the Notice of Intention is filed:

The proponent must file the written text of the initiative. **Elec. Code §9103**

The proponent needs to request a Ballot Title and Summary to be prepared. This request must include one of the proponent's name and address. **Elec. Code §9103**

A proponent of an initiative measure shall execute and submit a signed Statement of Acknowledgement (See Exhibit E, page 24) that it's a misdemeanor under state law to knowingly or willfully allow the signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot.

Elec. Code §9608

STEP 3...BALLOT TITLE AND SUMMARY

- Immediately upon the request from the proponent to prepare a Ballot Title and Summary, the ROV will transmit a copy of the proposed measure to County Counsel.
Elec. Code §9105
- Within 15 days after the proposed measure is filed, County Counsel will provide the Ballot Title and Summary to the ROV.
Elec. Code §9105
- The Ballot Title may differ from any other title of the proposed measure and shall express in 500 words or less the purpose of the measure.
Elec. Code §9105
- In providing the Ballot Title, County Counsel shall give a true and impartial statement of the purpose of the proposed measure in such language that the Ballot Title shall neither be an argument, nor be likely to create prejudice, for or against the proposed measure.
Elec. Code §9105
- The ROV will furnish a copy of the Ballot Title and Summary to you, the proponent.
Elec. Code §9105
- Any elector of the county may seek a writ of mandate requiring the Ballot Title or Summary prepared by the County Counsel to be amended. The Court shall expedite hearing on the writ. A peremptory writ of mandate shall be issued only upon clear and convincing proof that the Ballot Title or Summary is false, misleading, or inconsistent with the requirements of Elections Code Section 9105.
Elec. Code §9106

STEP 4...PUBLISHING THE NOTICE OF INTENTION AND FILING THE COUNTYWIDE INITIATIVE PETITION

- Prior to the circulation of the petition, a copy of the Notice of Intention, and the Ballot Title and Summary of the proposed measure, must be published at your, the proponent's, expense at least once in a newspaper of general circulation.
Elec. Code §9105(b)
- You must file proof of publication of the Notice of Intention and the Ballot Title and Summary with the ROV. Proof of publication can be obtained from the newspaper publisher after the Notice of Intention appears in print.
Elec. Code §9105(b)

PHASE 2 -- THE PETITION

STEP 1...FORMATTING THE PETITION



The petition format is described in Elections Code §9105. This format is mandated and must be used. See Exhibit F, page 25, for a sample of the countywide initiative format.

- The heading of the proposed measure shall be in a boldface type in substantially the following form:

INITIATIVE MEASURE TO BE DIRECTLY SUBMITTED TO THE VOTERS

The County Counsel has prepared the following title and summary of the chief purpose and points of the proposed measure: **Elec. Code §9105**

- The Ballot Title and Summary prepared by County Counsel shall appear upon each section of the petition, above the text of the proposed measure and across the top of each page of the petition on which signatures are to appear, in **roman boldface type not smaller than 11 point**. **Elec. Code §9105**
- The Ballot Title and Summary shall be clearly separated from the text of the measure. **Elec. Code §9105**
- **The text of the measure shall be printed in type not smaller than 8 point.**
Elec. Code §9105
- The Notice of Intention follows the Ballot Title and Summary. The law does not specify the type size for the Notice of Intention, but it should not be less than 8 point. **Each section of the petition shall bear a copy of the Notice of Intention.** **Elec. Code §9108**

Tips on Countywide Initiative Petition Format

- The petition can accompany any amount of signatures.
- The petition can be printed on 8 ½" x 11" or 8 ½" x 14" or larger.
- The petition can be single-side or doubled-sided.

OFFICIAL TOP FUNDERS DISCLOSURE REQUIREMENTS

NEW

- For any initiative or referendum petition for which the circulation is paid for by a committee formed pursuant to Government Code 82013, an Official Top Funders disclosure shall be included on the petition or in a separate document presented to a prospective signer of the petition. (Elections Code § 107(b))
- Elections officials are not required to verify the accuracy of the information or to reapprove the petition upon any updates the committee makes. (Elections Code § 107(g))

Official Top Funder Disclosure as a separate document

The Official Top Funders Sheet must be in 14-point black roman type font on a plain, contrasting background, centered horizontally, except as described. The text shall not be condensed or have spacing between characters reduced to be narrower than a normal roman type. (Elections Code § 107(a)(1))

The top of the sheet shall have the text “**OFFICIAL TOP FUNDERS.**” Valid only for should be followed by a month and year that starts at most seven days after the date at the top contributors as defined in Government Code section 84501(c) were last confirmed. (Elections Code §107 (a)(2).) This information shall be boldface and at least 16-point font. Following the top line, separated by a blank horizontal line, shall be the title of the initiative or referendum as it appears on the petition, in all capital letters. (Elections Code § 107(a)(2), (3))

Next, separated by a blank horizontal line, shall appear a disclosure statement in a printed or drawn box with a black border. (Elections Code § 107(a)(4).) At the top of the disclosure statement, the statement shall read, “Petition circulation paid for by” in boldface text followed by the name of the committee as it appears on the most recent Statement of Organization filed pursuant to Government Code section 84101 on the following line. (Elections Code § 107(a)(4)(A)-(D).) If the committee has any top contributors as defined in Government Code section 84501(c), it shall be followed by a blank horizontal line and then the underlined text “Committee major funding from:”. The top contributors, as defined in Government Code section 84501(c), if any, shall be disclosed in boldface text in descending order. (Elections Code § 107(a)(4)(D))

The committee, in its discretion, may include, in underlined text, “Endorsed by:” followed by a list, not underlined, of up to three endorsers. The text pursuant to this subparagraph shall be separated from the text above and below it by a blank horizontal line. (Elections Code § 107(a)(4)(E))

The following line shall include the text “Latest Official Top Funders:” followed by either the internet web page on the Secretary of State’s internet website that lists the “Official Top Funders” statements that are reported pursuant to Elections Code section 107(f), or the internet web page on the internet website for any committee formed pursuant to Government Code section 82013 that pays for the circulation of an initiative or referendum petition. (Elections Code § 107(a)(4)(F))

The committee’s web page must include a prominent link to the most recent Official Top Funders sheet in a format that allows it to be viewed on an internet website and printed out on a single page of paper. (Elections Code § 107(c)(1))

The sheet must be submitted to the Secretary of State's office upon any changes to the top contributors and must be posted on the Secretary of State's website along with the previous versions the committee submitted. (Elections Code § 107(f))

Official Top Funders Disclosure on the Petition

If the committee chooses to include the disclosure statement on the petition, the requirements are as follows:

The disclosure statement shall have a **solid white background** and **shall be in a printed or drawn box with a black border and shall appear before that portion of the petition for voters' signatures, printed names, and residence addresses**. The text in the disclosure area shall be in a black Arial equivalent type with a type size of at least 10 point, with all lines centered horizontally in the disclosure area. (Elections Code § 107(b)(1))

The top of the disclosure shall include the text "OFFICIAL TOP FUNDERS. Valid only for", followed by a month and year that starts at most seven days after the date the top contributors as defined in Government Code section 84501(c) were last confirmed. The text of this paragraph shall be boldface. (Elections Code § 107(b)(2))

Next shall appear, on a separate horizontal line, the text "Petition circulation paid for by", followed by the name of the committee as it appears on the most recent Statement of Organization filed pursuant to Government Code section 84101. If the committee has any top contributors as defined in Government Code section 84501(c), it shall be followed by, on a separate horizontal line, the underlined text "Committee major funding from:". (Elections Code § 107(b)(3))

The top contributors as defined in Government Code section 84501(c), if any, shall each be disclosed in boldface text on a separate horizontal line separate from any other text, in descending order, beginning with the top contributor who made the largest cumulative contributions, as defined in Government Code section 84501(b), on the first line. (Elections Code § 107(b)(4))

The committee, in its discretion, may include the underlined text "Endorsed by:", followed by a list, not underlined, of up to three endorsers. The text in this paragraph shall be separated from the text above and below it by a blank horizontal line. (Elections Code § 107(b)(5))

The following line shall include the text "Latest info:" followed by the URL for either the internet web page on the Secretary of State's internet website that lists the "Official Top Funders" statements and any updates provided by the committee to the Secretary of State, or the internet website of any committee formed pursuant to Government Code section 82013 that pays for the circulation of an initiative or referendum petition.

The text specified in this paragraph shall be underlined. (Elections Code § 107(b)(6))

The committee's web page must include a prominent link to the most recent Official Top Funders sheet in a format that allows it to be viewed on an internet website and printed out on a single page of paper. (Elections Code § 107(c)(1))

STEP 2...SIGNATURE SPACE



Each signer must personally place his or her own information on the petition unless unable to do so, and must personally sign it. If a signer is unable to personally affix on a petition his or her own information, the signer may request another person to print the signer's name and place of residence on the appropriate spaces of the petition, but the signer shall personally affix his or her mark or signature on the appropriate space of the petition, which shall be witnessed by one person by subscribing his or her name thereon. **Elec. Code §100.5**

The petition must be designed so that each signer can **personally affix his or her:**

- (a) printed name;
- (b) signature;
- (c) residence address, giving street and number, or if not street or number exists, adequate designation of residence so that the location may be readily determined; and
- (d) name of incorporated city or unincorporated community in which he/she resides. **Elec. Code §100**

See Exhibit F on page 25 for the format of the signature space.

- Pursuant to the California Supreme Court's decision in Assembly v. Deukmejian, 30 Cal.3d 638, 180 Cal.Rptr. 297(1982), the petition form must direct signers to include their "residence address" rather than "address as registered" or other address. Non-complying petition forms will be rejected as invalid.
- Signature spaces must be consecutively numbered commencing with the number one for each petition section. **Elec. Code §100**
- A space of at least one inch wide must be left blank at the right margin of the page after each name and address for the use of the ROV in verifying the petition. **Elec. Code §100**
- Notwithstanding any other provision of law, any state or local initiative petition required to be signed by voters shall contain in 11-point type, prior to that portion of the petition for voters' signatures, printed names, and residence addresses, a notice to the public. (See Exhibit F, page 25)

NOTICE TO THE PUBLIC

THIS PETITION MAY BE CIRCULATED BY A PAID SIGNATURE GATHERER OR A VOLUNTEER. YOU HAVE THE RIGHT TO ASK.

Elec. Code §101

STEP 3...DECLARATION OF CIRCULATOR

- Each section of the petition must have attached to it a declaration signed by the circulator (person soliciting signatures) of that section of the petition, setting forth **in the circulator's own hand**, all of the following:

- (a) the printed name of the circulator;
- (b) the residence address of the circulator, giving street and number, if no street exists, adequate designation of residence so that the location may be readily determined;
- (c) the dates between which all signatures to the petition were obtained.

Elec. Code §104

- The declaration must also include:

- (a) that the circulator circulated that section and witnessed the appended signatures being written;
- (b) that according to the best information and belief of the circulator, each signature is the genuine signature of the person whose name it purports to be;
- (c) that the circulator is 18 years of age or older;
- (d) if the petition does not include the disclosure statement described by subdivision (b) of Section 107, that the circulator showed each signer a valid and unfalsified "Official Top Funders" sheet, as required by Section 107.
- (e) that the circulator certifies to the content of the declaration as to its truth and correctness, under penalty of perjury under the laws of the State of California, with the signature of the circulator's name. The circulator shall state the date and the place of execution on the declaration along with his or her signature.

Elec. Code §104

- The declaration may be omitted on the front side of the petition if signature spaces are provided on both sides. The circulator's declaration must follow the last signature block.



The circulator must personally affix his or her printed name and residence address and the specific dates of circulation of each petition section in every circulator's affidavit. Preprinted dates, or generalized dates other than the particular range of dates on which the petition section was circulated, are not authorized.

Elec. Code §104

PHASE 3 – CIRCULATION OF THE PETITION



You cannot start to circulate the petition among the voters of the county for signatures until after publication of the Notice of Intention and the Ballot Title and Summary prepared by County Counsel. Elec. Code §9105

- There are two important pieces of information you need to know before circulating the countywide initiative petition:
How many signatures are required to qualify the countywide initiative?
How many days do you have to get the job done?

NUMBER OF SIGNATURES NEEDED TO QUALIFY A COUNTYWIDE INITIATIVE:

- The ROV will determine the number of signatures required to sign the petition by obtaining the number of votes cast within the county for all candidates for Governor at the last gubernatorial election preceding the publication of the Notice of Intention to circulate the initiative petition. The minimum amount is 10% of that number. Elec. Code §§9107, 9118



The vote for Governor in November 2022 in
Orange County was 956,940.
10% = 95,694

DEADLINE TO FILE THE PETITION:

- You need to secure signatures and present the petition to the ROV for filing **within 180 days from the date of receipt of the Ballot Title and Summary**, or after termination of any action for a writ of mandate pursuant to Elections Code Section 9106 and, if applicable, after receipt of an amended title or summary or both, whichever occurs later. Elec. Code §9110

NOW YOU'RE READY TO CIRCULATE THE PETITION

GENERAL INFORMATION

WHO CAN CIRCULATE THE PETITION?

- A person who is 18 years of age or older may circulate an initiative, referendum, or initiative or referendum petition. **Elec. Code §102**
- The proponents of an initiative measure shall ensure that any person, company, or other organization that is paid, or who volunteers, to solicit signatures to qualify the proposed measure for the ballot shall receive instruction on the requirements and prohibitions imposed by state law with respect to circulation of the petition and signature gathering thereon, with an emphasis on the prohibition on the use of signatures on an initiative petition for a purpose other than qualification of the proposed measure for the ballot. **Circulators and the person in charge of signature gathering shall execute and submit to the proponents a signed statement (See Exhibit G, page 26). The statement does not need to be submitted by unpaid circulators of state or local initiatives. Failure to comply with this section shall not invalidate any signatures on a state or local initiative petition.**

Elec. Code §§9607, 9609, 9610

- The circulator's signed statement shall be kept on file by the proponents of the proposed initiative measure for not less than eight months after the certification of the results of the election for which the measure qualified, or if the measure, for any reason, is not submitted to the voters, eight months after the deadline for submission of the petition to the ROV. **Elec. Code §§9609, 9610**

WHO CAN SIGN THE PETITION?

- Only persons who are eligible registered voters of the county at the time of signing the petition are entitled to sign it. **Elec. Code §100**
- Any person engaged in obtaining signatures on the initiative petition may sign the petition, if otherwise qualified to do so. **Elec. Code §106**

CAN SIGNATURES BE WITHDRAWN?

A voter who has signed an initiative or referendum petition, and who subsequently wishes their name withdrawn, may do so by filing a written request for the withdrawal with the appropriate elections official that includes the name or title of the petition and the voter's name, residence address, and signature. This request shall be filed in the elections official's office prior to the date the petition is filed. A written request made under this section shall not constitute a petition or paper for purposes of Section 104.

Elec. Code §§103, 9602



IMPORTANT TIPS ON SIGNATURE GATHERING

- **The signers of a countywide initiative petition must sign the petition in their own handwriting. They must personally fill-in their name, address, and signature unless the signer is unable to do so. If a signer is unable to personally affix on a petition his or her own information, the signer may request another person to print the signer’s name and place of residence on the appropriate spaces of the petition, but the signer shall personally affix his or her mark or signature on the appropriate space of the petition, which shall be witnessed by one person by subscribing his or her name thereon.**

Elec. Code §100.5

- The ROV recommends obtaining an **additional 50%** of signatures above the amount that is required to compensate for signers who are disqualified for not being registered, being registered but not living in the county, or for other reasons.
- **You can register a voter at the same time they sign the countywide initiative petition. The registration must be received by the ROV by the time the petition is filed with the ROV.**
- Make sure the voter is registered and lives in the county. Resources can be purchased from the ROV to assist in this process, including precinct maps (contact Map Unit at 714-567-7610); indexes – printed lists of registered voters by precinct, listed by address with the street names arranged alphabetically and street numbers in numerical order for a given street name. – (contact 714-834-7116); and, registration forms (contact 714-567-7569).
- **The signature on the initiative petition does not have to be a “rubber stamp”, exactly matching the voter’s registration.**

BOARD OF SUPERVISORS' ACTION DURING CIRCULATION

- During the circulation of the petition or before taking any action to either submit the initiative to the voters or enact the ordinance, the Board of Supervisors may refer the initiative to any county agency for review and a report on its effect on specific issues. This report shall be presented to the Board no later than 30 calendar days after certification of the petition's sufficiency by the ROV. **Elec. Code §9111**

PHASE 4 – FILING THE PETITION

STEP 1...WHO CAN FILE THE PETITION AND WHERE IS IT FILED?

- The petition shall be filed by the proponents, or by any person or persons authorized in writing by the proponents. **Elec. Code §9113**
- Signatures shall be secured and the petition shall be presented to the county elections official for filing within 180 days from the date of receipt of the title and summary, or after termination of any action for a writ of mandate pursuant to Section 9106 and, if applicable, after receipt of an amended title or summary or both, whichever occurs later. **Elec. Code §9110**

STEP 2...MEETING THE DEADLINE

- Submit your petitions to the ROV by the deadline – within **180 days** from the date of receipt of the Ballot Title and Summary or after termination of any action for a writ of mandate pursuant to Elections Code Section 9106 and, if applicable, after receipt of an amended title or summary or both, whichever occurs later.
- The petitions must be filed during normal business hours.
- All sections of the petition must be filed at the same time and may not be amended or supplemented except by order of a court of competent jurisdiction. Any sections not so filed shall be void for all purposes. **Elec. Code §9113**

STEP 3...EXAMINATION BY THE ROV

- The ROV will ask the filer to provide the number of sections (pages in a single petition) and number of signatures. The ROV recommends that the petitions be separated in stacks reflecting the amount of signers on each petition (all sections with one signature in one stack, all with two signatures in another stack, etc.).
- This assists the ROV to determine whether the number of signatures, on its face, is equal to or is in excess of the minimum number of signatures required. If so, the ROV shall accept the petition for filing.
- The petition shall be deemed as filed on that date. Any petition not so filed must be returned to the proponents and is void for all purposes. **Elec. Code §9113**
- The ROV will provide the proponents with the deadline for the ROV to verify the signatures (30 days from the date of filing, excluding Saturdays, Sundays, and holidays, except as provided in Elec. Code §9115). **Elec. Code §9114**

PHASE 5 – VERIFICATION OF SIGNATURES

There are two types of signature verification techniques: 100% or random sampling.

100% Verification of Signatures:

- The ROV must verify every signature submitted if less than 500 signatures are submitted. **Elec. Code §9115**
- If more than 500 signatures are submitted, then the ROV may choose to use a random sampling signature verification. **Elec. Code §9115**
- The random sampling shall include an examination of at least 500, or 3% of the signatures, whichever is greater. **Elec. Code §9115**

Random Sampling Verification of Signatures:

- If the random sampling technique is used, the ROV must complete the examination of the sample of signatures within 30 days, excluding Saturdays, Sundays, and holidays of the filing of the petition. If, for example, 87% of the sample signatures are found to be valid, then 87% of the entire number of signatures are deemed to be valid. **Elec. Code §9115**

Formula for Random Sampling

V = Number of Valid Signatures

A = Value of Each Signature

B = Extra Value of Each Duplicate Signature

C = B x The Number of Duplicates

For Example below: Raw Count: 24,034; Sample (3%): 722; Sufficient in Sample: 516; Number of Duplicates: 2

1. CALCULATE

$$\text{Raw Count (24,034)} \times \frac{\text{Sufficient in Sample (516)}}{\text{Sample (722 [3\%] or 500, whichever is greater)}} = V (17,178)$$

2. DIVIDE

$$\frac{\text{Raw Count (24,034)}}{\text{Sample (722)}} = A (33.2881)$$

3. MULTIPLY

$$A (33.2881) \times (A - 1) (32.2881) = B (1074.8095)$$

4. MULTIPLY

$$B (1074.8095) \times (\text{Number of duplicates}) (2) = C (2,150)$$

5. SUBTRACT

$$V (17,178) - C (2,150) = \text{Corrected Valid (15,028)}$$

After the random sampling is completed, can a 100% verification be done?

- Yes. If the random sampling shows that the number of valid signatures is within 95% to 110% of the number of signatures needed, the ROV must examine and verify each signature filed. **Elec. Code §9115**
- **Additional time is allowed for the 100% signature verification after the random sampling has been conducted.** The ROV must, within 60 days from the date of the filing of the petition, excluding Saturdays, Sundays, and holidays, examine and verify each signature filed. **Elec. Code §9115**

What happens if the random sampling determines that the number of valid signatures is less than 95% of the number of signatures needed?

- The ROV shall certify the petition to be insufficient. **Elec. Code §9115**
- If the petition is found insufficient, no action shall be taken on the petition. However, the failure to secure sufficient signatures shall not preclude the later filing of an entirely new petition to the same effect. **Elec. Code §9115**

What happens if the random sampling determines that the number of valid signatures is over 110% of the number of signatures needed?

- The petition is considered qualified without further verification, and the ROV must certify the results of the examination to the governing board at its next regular meeting. **Elec. Code §9115**



Deadline for Verifying Signatures
The ROV has within 30 days of the filing of the petition, excluding Saturdays, Sundays, and holidays, to verify the signatures unless after a random sampling has been conducted, the ROV needs to examine and verify each signature. Then, the ROV has within 60 days of the filing of the petition, excluding Saturdays, Sundays, and holidays, to verify each signature filed.

PHASE 6 – CERTIFICATION

- If the petition is found to have insufficient signatures, the ROV will certify the results by preparing a certificate and notifying you, the proponent, of this result. No further action will be taken; but, the petition shall remain on file.
Elec. Code §9115
- If the petition is found to have sufficient signatures, the ROV will certify the results by preparing a certificate. You, the proponent will be notified of this result.
Elec. Code §9115
- If the petition is found sufficient, the ROV shall certify the results of the examination to the Board of Supervisors at its next regular meeting.
Elec. Code §9114



Who May Examine a Petition?

If a petition is found to be **sufficient** by the ROV, proponents and members of the public may **not** examine the petition.
Elec. Code §7924.110

If a petition is found to be **insufficient** by the ROV, the proponents whose names are listed on the Notice of Intention and the representatives of the proponents as may be designated by the proponents in writing **must** be allowed to examine the petition signatures in order to ascertain which signatures were disqualified and the reasons therefor.
Elec. Code §11301

NOTE: THIS RIGHT OF EXAMINATION IS NOT OTHERWISE AVAILABLE TO PROPONENTS OR TO THE PUBLIC IN GENERAL.

If the proponents examine the petition signatures, such examination shall begin **no later than 21 days** after certification of insufficiency.
Elec. Code §7924.110

The elections official shall preserve in his or her office all countywide initiative petitions filed for eight months after the results of the election for which the petition is qualified, or if no election is held, eight months after the elections official's final examination of the petition.
Elec. Code §17200

PHASE 7 – BOARD OF SUPERVISORS’ OPTIONS

Countywide Initiative Petition Signed by 10%...

- If the countywide initiative petition is **signed by voters not less in number than 10 percent** of the entire vote cast in the county for all candidates for Governor at the last gubernatorial election preceding the publication of the Notice of Intention to circulate an initiative petition, the Board of Supervisors shall do one of the following:



NOTE: When legally possible, the Special Election may be consolidated with a Regular or Special Election held within 6 months (180 days) or the Special Election shall be held not less than 88 nor more than 103 days after the order date of the election. However, the 103-day deadline may be extended in certain cases. The intent is that not more than one Special Election for a countywide initiative measure be held by one jurisdiction during any 180-day period. **Elec. Code §1405**

- (a) Adopt the ordinance without alteration either at the regular meeting at which the certification of the petition is presented, or within 10 days after it is presented; **Elec. Code §9118**
- (b) Submit the ordinance, without alteration, to the voters pursuant to subdivision (b) of Elections Code Section 1405. **Elec. Code §9118**



NOTE: The election shall be consolidated with the next statewide election occurring not less than 88 days after the date of the Board order or after the Board of Supervisors is presented with the report.

Elec. Code §1405

- (c) Order a report pursuant to Elections Code Section 9111 at the regular meeting at which the certification of the petition is presented. When the report is presented to the Board of Supervisors, it shall either adopt the ordinance within 10 days or order an election pursuant to subdivision (b).

Elec. Code §9118

PHASE 8 -- ELECTION

- Whenever any ordinance is required to be submitted to the voters of a county at any election, the ROV shall cause the ordinance to be printed. A copy of the ordinance shall be made available to any voter upon request.

Elec. Code §9119



VOTERS MAY SUBMIT DIRECT ARGUMENTS

- The Board of Supervisors or any member or members of the Board authorized by the Board, or any individual voter who is eligible to vote on the measure, or bona fide association of citizens, or any combination of these voters and associations may file a written argument for or against any county measure. Elec. Code §9162
- No arguments shall exceed 300 words in length. Elec. Code §9162
- The ROV will print an argument for, an argument against, and the analysis of the measure. A copy of both arguments preceded by the analysis will be enclosed with each voter information guide Elec. Code §9162
- Based on time reasonably necessary to prepare and print the arguments, analysis, and voter information guides, and to permit the 10-calendar day public examination for the election, the ROV shall fix/determine a reasonable date prior to the election after which no arguments for or against any county measure may be submitted for printing and distribution to the voters – usually 88 days prior to election. Elec. Code §9163
- A ballot argument will not be accepted unless accompanied by the printed name and signature or printed names and signatures of the person or persons submitting it, or, if submitted on behalf of an organization, the name of the organization and the printed name and signature of at least one of its principal officers. Elec. Code §9164
- No more than five signatures shall appear with any argument submitted. In case any argument is signed by more than five persons, the signatures of the first five shall be printed. Elec. Code §9164

WHAT HAPPENS IF MORE THAN ONE DIRECT ARGUMENT FOR OR MORE THAN ONE ARGUMENT AGAINST IS SUBMITTED?

- If more than one argument for or more than one argument against any county measure is submitted to the ROV within the time prescribed, the ROV shall select one of the arguments in favor and one of the arguments against the measure for printing and distribution to the voters. In selecting the argument, the ROV shall give preference and priority in the order named to the arguments of the following:
 - a. The Board of Supervisors, or member or members of the Board authorized by the Board.
 - b. The individual voter, or bona fide association of citizens, or combination of voters and associations, who are the bona fide sponsors or proponents of the measure.
 - c. Bona fide associations of citizens.
 - d. Individual voters who are eligible to vote on the measure.
- In order to enable the county elections official to determine whether it qualifies as a bona fide association of citizens, an organization or association submitting an argument for or against a county measure shall submit with its argument a copy of one of the following:
 - a. Its articles of incorporation, articles of association, partnership documents, bylaws, or similar documents.
 - b. Letterhead containing the name of the organization and its principal officers.
 - c. If the organization or association is a primarily formed committee established to support or oppose the measure, its statement of organization filed pursuant to Section 84101 of Government Code.
- In selecting an argument from among bona fide associations of citizens, the ROV shall not consider the type of document submitted.

Elec. Code §9166

Rebuttal Arguments....

- When an argument in favor and an argument against a measure have been selected for publication in the voter information guide, the ROV shall send copies of the argument in favor of the measure to the authors of the argument against the measure and copies of the argument against the measure to the authors of the argument in favor. **Elec. Code §9167**
- The authors may prepare and submit rebuttal arguments not exceeding 250 words or may authorize in writing any other person or persons to prepare, submit, or sign the rebuttal argument. **Elec. Code §9167**
- The rebuttal arguments shall be submitted to the ROV no later than a date designated by the ROV. **Elec. Code §9167**

Impartial Analysis...

- Whenever any county measure qualifies for a place on the ballot, the ROV shall transmit a copy of the measure to the county auditor and to the county counsel. The county counsel shall prepare an impartial analysis of the measure showing the effect of the measure on the existing law and the operation of the measure. The analysis shall be printed preceding the arguments for and against the measure and may not exceed 500 words in length. **If the full text is not printed in the voter information guide, information must be given in the Impartial Analysis where a copy of the measure text may be obtained.**
Elec. Code §9160

PHASE 9 -- WHAT HAPPENS IF THE PROPOSED ORDINANCE IS APPROVED BY THE VOTERS?

- If a majority of the voters voting on a proposed ordinance vote in its favor, the ordinance shall become a valid and binding ordinance of the county.
Elec. Code §9122
- The ordinance shall be considered as adopted upon the date the vote is declared by the Board of Supervisors, and shall go into effect 10 days after that date.
Elec. Code §9122
- If the provision of two or more ordinances adopted at the same election conflict, the ordinance receiving the highest number of affirmative votes shall control.
Elec. Code §9123
- The enacting clause of an ordinance submitted to the voters of a county shall be substantially in the following form:
“The people of the County of Orange ordain as follows:”
Elec. Code §9124
- No ordinance proposed by initiative petition and adopted either by the Board of Supervisors without submission to the voters or adopted by the voters shall be repealed or amended except by a vote of the people, unless provision is otherwise made in the original ordinance. In all other respects, an ordinance proposed by initiative petition and adopted shall have the same force and effect as any ordinance adopted by the Board of Supervisors.
Elec. Code §9125

GLOSSARY OF TERMS

CIRCULATOR	A paid or volunteer person, who is a voter or qualified to vote in the state.
ELECTIONS OFFICIAL	The Registrar of Voters is the elections official for countywide initiatives.
GOVERNING BOARD	For a countywide initiative, the Board of Supervisors of a county.
NOTICE OF INTENTION	Statement of proponents' desire to circulate a countywide initiative petition and it may state the reasons for the proposed petition.
PROPONENT	A person who initiates the countywide initiative petition process, and has control of the circulation and signature collection for the petition.
RANDOM SAMPLE OF SIGNATURES	Signatures selected at random using a computerized random numbers generator. The sample of signatures for verification is selected in such a manner that every signature filed with the Registrar of Voters has an equal opportunity to be included in the sample.
RAW COUNT	The total number of unverified signatures affixed to a petition and submitted to an elections official.
RESIDENCE	"Residence" for voting purposes means a person's domicile. The domicile of a person is that place in which his/her habitation is fixed, wherein, the person has the intention of remaining, and to which, whenever he/she is absent, the person has the intention of returning. At a given time, a person may have only one domicile.
SECTION OF A PETITION	Page of a petition.
SIGNATURE VERIFICATION	The process of comparing a person's signature on a petition with the signature on file with the voter registration records to determine if they match. The signer must be a duly registered voter qualified to sign the petition in order for the signature to be counted as valid. The address on the petition must match the registered address.

COUNTYWIDE INITIATIVE PROCESS TIMELINE

This sample timeline is an example, but does not represent an exact timeline for your particular countywide initiative process. It is provided to give you a general idea of the length of the process.

The clock starts ticking when the Notice of Intention is filed with the ROV.

Within 15 days from the date the proposed measure is filed, County Counsel will provide the Ballot Title and Summary to the ROV.

Within 180 days from the date of receipt of the Ballot Title and Summary, signatures shall be secured, and the petition shall be presented to the ROV for filing. **Remember:** Prior to circulation of the petition, the Notice of Intention must be published with Title and Summary, and Proof of Publication must be filed with the ROV.

*Within 30 days (excluding Saturdays, Sundays, and holidays) from the date the petition is filed, the ROV will verify and certify the signatures.

Within 10 days after the certification of the petition is presented at a regular meeting, the Board of Supervisors shall adopt the ordinance, or issue an order stating that an election will be held. They may also order a report, and after that report is presented to the Board, adopt the ordinance within 10 days or order an election.

If the proposed measure goes to election, there are additional deadlines, including submission of direct and rebuttal arguments, submission of impartial analysis by County Counsel, public examination of arguments and impartial analysis, and mailing of voter information guide. A separate election calendar would be provided with these dates.

If proposed ordinance is approved by voters the ordinance shall be considered as adopted upon the date the vote is declared by the Board of Supervisors, and shall go into effect 10 days after that date.

*After the random sampling has been conducted, if it is determined a 100% signature verification is needed, the ROV shall, within 60 days from the filing of the petition, excluding Saturdays, Sundays, and holidays, examine and verify each signature.

EXAMPLE
NOTICE OF INTENTION TO CIRCULATE PETITION

Notice is hereby given by the persons whose names appear hereon of their intention to circulate the petition within the County of Orange for the purpose of qualifying for the ballot an initiative measure entitled _____.

A statement of the reasons of the proposed action as contemplated in the petition is as follows: _____ (reasons for initiative not exceeding 500 words – optional) _____.

*

(Signature of Proponent)

(Business or Residence Address)

(City/State/Zip Code)

*The Notice of Intention must be signed by at least one but not more than five proponents of the petition.

NOTE: The Notice of Intention must be accompanying by (1) the written text of the measure; (2) a request for a ballot title and summary to be prepared by County Counsel; and (3) a Statement of Acknowledgement.

WORD COUNT GUIDELINES

Elec. Code §9

The following guidelines are used by the ROV for counting words on the notice of intention, ballot measure text, direct arguments, rebuttals, and other ballot enclosures.

Punctuation is not counted. Symbols such as “&” (and), and “#” (number/pound) are not considered punctuation and each symbol is counted as one word.

Dictionary wordsone word
The words "a", "the", "and", "an" are counted as individual words.

All proper nouns, including geographical names, shall be considered one word; for example, “County of Orange”, “San Juan Capistrano” one word

Abbreviations - UCLA, U.C.L.A., PTA, P.T.A., USMC, U.S.M.C.....one word

Regularly hyphenated words appearing in any generally available standard reference dictionary published in the United States within 10 calendar years preceding the election. Each part of all other hyphenated words shall be counted as a separate word.....one word

Dates – all digits (4/8/98)one word

Words and digits (April 8, 1998)one word

Whole numbers - Digits (1 or 10 or 100, etc.)one word

Spelled out (one or ten or one hundred)each word counts as one word

Numeric combinations (1973, 18 1/2, 1971-73, 5%)one word

Monetary amounts (if the dollar sign is used with figures - \$1,000) one word

Spelled out (one thousand dollars).....one for each word

Telephone numbers.....one word

Internet web site address.....one word

PROPONENT STATEMENT OF ACKNOWLEDGEMENT

I, _____ acknowledge that it is a misdemeanor under State Law (Section 18650 of the California Elections Code) to knowingly or willfully allow the signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot.

I certify that I will not knowingly or willfully allow the signatures for this initiative to be used for any purpose other than qualification of the measure for the ballot.

(Signature of Proponent)

Dated this _____ day of _____, 20__

EXAMPLE OF INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

(Including Official Top Funders section. This section may be omitted if a copy of the "Official Top Funders" sheet is provided pursuant to Election Code Section 107(b)(1).

The County Counsel has prepared the following title and summary of the chief purpose and points of the proposed measure:

Insert Ballot Title and Summary
(See Petition Format, page 3, for more information)

INSERT TEXT OF MEASURE
(Type should be not smaller than 8 point; it must be clearly separated from the ballot title and summary above)

Notice of Intention to Circulate Petition
(See page 2 for more information)

NOTICE TO THE PUBLIC

<p>OFFICIAL TOP FUNDERS. Valid only for [Month, Year] Petition circulation paid for by [name of the committee as it appears on the most recent Statement of Organization filed pursuant to Government Code section 84501] <u>Committee major funding from:</u> [Largest contributor] [Second largest contributor] [Third largest contributor] [OPTIONAL] <u>Endorsed by:</u> [First endorser] [Second endorser] [Third endorser] Latest info: [link to Secretary of State Top Funders website or committee website]</p>

THIS PETITION MAY BE CIRCULATED BY A PAID SIGNATURE GATHERER OR A VOLUNTEER. YOU HAVE THE RIGHT TO ASK.

	(Print Name)	(Residence Address ONLY)	Official Use Only
1.	(Signature)	(City)	
	(Print Name)	(Residence Address ONLY)	
2.	(Signature)	(City)	

DECLARATION OF PERSON CIRCULATING SECTION OF INITIATIVE PETITION
(MUST BE IN CIRCULATOR'S OWN HANDWRITING)

(See page 9 for more information)

I, _____ solemnly swear (or affirm) all of the following:
(Print Name)

1. That I am 18 years of age or older.
2. That my residence address is _____. (If no such street number exists, adequate designation of residence so that the location may be readily ascertained)
3. That the signatures on this section of the petition form were obtained between the dates of ___(Starting date)___ and ___(Ending date)___; that I circulated the petition and I witnessed the signatures of this section of the petition form 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.
4. That I showed each signer a valid and unfalsified "Official Top Funders" sheet, as required by Elections Code Section 107.

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

Executed on _____(Date)_____at _____(City)_____, California.
_____(Circulator's Signature)_____ (Date)_____

(You must leave a 1" margin at the top. It is recommended that you leave a 1/2" margin on the left, right and bottom.)

CIRCULATOR STATEMENT OF ACKNOWLEDGEMENT

I, _____ acknowledge that it is a misdemeanor under State Law (Section 18650 of the California Elections Code) to knowingly or willfully allow the signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot.

I certify that I will not knowingly or willfully allow the signatures for this initiative to be used for any purpose other than qualification of the measure for the ballot.

(Signature of Circulator)

Dated this _____ day of _____, 20__