

Signature Gathering

**FUNDING THE  
NEXT GENERATION**

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**50+1 Strategies***

# Goals and Agenda

- Goals
  - Expectation setting of initiative process
  - Basic understanding of requirements
  - Best practices
- Agenda
  - Laws for Ballot Initiative Process
  - Ballot Initiative Timeline
  - Petition requirements
  - Signature gathering tips and process

# Disclaimer

This is not legal advice. Absolutely seek legal counsel when making decisions regarding your ballot initiative!

# Laws for Ballot Initiative Process (1/3)

## Laws

- Counties follow the law as laid out in the CA Elections Code for county ballot measures (9100-9126)
  - This process parallel state ballot measure process
    - 180 days to collect signatures
    - No hard deadline for signature submission
  - Examples: Los Angeles, Orange, Contra Costa, Sonoma, SLO, all use this state law
    - Many counties provide handbooks on initiatives

# Laws for Ballot Initiative Process (2/3)



## Laws

- Municipal ballot measure laws vary city to city
  - General law cities follow Elections Code sections 9200-9295
    - This process is similar to that for counties
  - Charter cities like SF may have completely different rules
    - How they differ varies greatly
    - Many charter cities do defer to state law

# Laws for Ballot Initiative Process (3/3)



## Laws

- Counties and municipalities generally do not have hard deadlines for submitting signatures
  - SF is an exception
- Proponents must begin the process early enough to ensure that that enough time for petitions to be verified
  - Initiatives must also be presented before the local legislature in most cases

# County Ballot Initiative Timeline for General 2022

Process

- August to October 2021
  - Draft your initiative
    - Always consult legal counsel!
- November 1st, 2021
  - Notice of Intention to Circulate and Requesting Title and Summary
- November 2nd-16th, 2021
  - Ballot Title and Summary
    - May take up to 15 days



# County Ballot Initiative Timeline (2/3)

Process

- November 19th (Approximate)
  - Publish Notice of Intention to Circulate and Ballot Title and Summary
- November 20th, 2021 (Approx.) - May 15th, 2022
  - Circulate the Petition!
- June 7, 2022
  - **Suggested** Latest Date to Submit Signatures to ROV
  - Signature must be submitted in one go





# County Ballot Initiative Timeline (3/3)

## Process

- August 2, 2022 (Approximate)
  - Deadline for Submission of Certified Petition to BOS (Last Regular BOS Meeting)
- August 12, 2022
  - Last Day BOS can place measure on Nov 2022 Ballot (E-88)
- November 8, 2022
  - Election Day



# County Ballot Initiative Timeline Notes



## Process

- Assumes desire to use full 180 days for petition circulation
  - Could be done in 90 days
- Assumes full-count method is not required
  - Could extend process by up to 60 business days!
- Assumes Board of Supervisors does not order an impact report before or after the measure is certified for sufficient signatures
  - Could add up to 30 days after certification!

# Setting Signature Goals

## Goals

- Know the requirements
  - Number of signatures
  - Type of initiative
- Build in a cushion to avoid a full count



# Signatures Required

Laws

- **Valid Signatures Required for County Initiative**
  - 10% of the number of votes cast within the county in the last gubernatorial election.
- **Valid Signatures Required for General Law City Initiative**
  - 10% of the number of registered voters in the city
- **Charter Cities**
  - Varies. Ex. SF Uses 5% of votes cast for mayor

# Meeting Signature Goals

Accountability

Organization Progress to Goal									
							Week ending	10/22/2017	31
							Benchmark %	46%	Days remaining
Organization	Minimum Wage			Paid Family Medical Leave			Combined Signatures		
	Goal	Signatures	% to Goal	Goal	Signatures	% to Goal	Total	Benchmark for This Week	% to Benchmark
	250		0%	250		0%	0	229	0%
		128			208		336	0	
	2,000	609	30%	2,000	648	32%	1,257	1,833	69%
	200	171	86%	200	159	80%	330	183	180%
	2,000	140	7%	2,000	140	7%	280	1,833	15%
							0	0	
		222			221		443	0	
	1,750	795	45%	1,750	782	45%	1,577	1,604	98%
	500		0%	500		0%	0	458	0%
	100		0%	100		0%	0	92	0%
	100	51	51%	100	55	55%	106	92	116%
	15,000	6,707	45%	15,000	9,409	63%	16,116	13,750	117%
	1,000	443	44%	1,000	432	43%	875	917	95%
	250		0%	250		0%	0	229	0%
		212			172		384	0	
		17			18		35	0	
				100		0%	0	46	0%
							0	0	
	1,000	521	52%		0		521	458	114%
	4,000	2,427	61%	1,000	94	9%	2,521	2,292	110%
							0	0	
	250		0%	250		0%	0	229	0%
	2,500	2,500	100%	2,500	2,507	100%	5,007	2,292	218%
	1,500	1,564	104%	1,500	1,513	101%	3,077	1,375	224%

## Best Practices:

- Set realistic goals considering organizational capacity
- Use a shared tracker for accountability and motivation



# Notice of Intention to Circulate Example



Sample

## **NOTICE OF INTENTION TO CIRCULATE AN INITIATIVE PETITION**

(Sample Notice for Publication)

Notice is hereby given of the intention of the persons whose names appear hereon of their intention to circulate the petition with the \_\_\_\_\_ District for the purpose of placing an initiative measure on the ballot. A statement of the reasons for the proposed action as contemplated in the petition is as follows:

Insert the Statement of Reasons for this petition here - up to 500 words.

Printed Name/Signature/Residence or Business Address - of at least one, but not more than five proponents.

# Petition Format



Format

- **VERY IMPORTANT!**
- Petitions will likely span multiple pages
- Under state law, they may be bound by staples but an accordion fold is preferable
- Must contain a copy of the **Notice of Intention, Title and Summary, and Full Text of Initiative**
- Title and summary must appear at top of each section

## INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

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)

Sample

**The Ballot Title and Summary prepared by the County Counsel shall appear upon each section of the petition, above the text of the proposed measure and across the top of each page on the petition on which signatures are to appear, in roman boldface type not smaller than 11 point. §9105(c)**

### 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 Los Angeles for the purpose of **(insert purpose of measure)**. A statement of the reasons of the proposed action as contemplated in the petition is as follows:

A 500 word statement outlining the reasons for the proposed petition may be printed here. The statement is optional. The notice shall contain the printed name, signature, and business or residence address of at least one, but not more than five, proponents. §9104. To print on the petition, format the signature as "Name, Address, City, State, Zip". Each section of the petition shall bear a copy of the Notice of Intention. §9108. So, if it is on the front side, it may be omitted on the back. The law does not specify the type size for the Notice of Intention, but it should not be less than 8-point.

Insert text of measure in type not smaller than 8 point and, it must be clearly separated from the ballot title and summary above. §9105(c) if printed once on the back side, text must follow the Ballot Title and Summary.

### NOTICE TO THE PUBLIC

**YOU HAVE THE RIGHT TO SEE AN "OFFICIAL TOP FUNDERS" SHEET  
THIS PETITION MAY BE CIRCULATED BY A PAID SIGNATURE GATHERER OR A  
VOLUNTEER, YOU HAVE THE RIGHT TO ASK.  
THE USE OF YOUR SIGNATURE FOR ANY OTHER PURPOSE OTHER THAN  
QUALIFICATION OF THIS MEASURE FOR THE BALLOT IS A MISDEMEANOR.  
COMPLAINTS ABOUT THIS MISUSE OF YOUR SIGNATURE MAY BE MADE TO THE  
SECRETARY OF STATE'S OFFICE**

Print in 11-  
point type,  
prior to the  
portion for  
voters'  
signature.  
§101





	NAME	RESIDENCE	
1	Print Your Name ..... Your Signature as Registered to Vote .....	Residence Address ONLY ..... City or Town .....	
2	Print Your Name ..... Your Signature as Registered to Vote .....	Residence Address ONLY ..... City or Town .....	
3	Print Your Name ..... Your Signature as Registered to Vote .....	Residence Address ONLY ..... City or Town .....	

← 1' §100 →

Each petition Section shall have attached to it an affidavit to be completed by the circulator, §104, 9109. This declaration below may be omitted on front side if signature spaces are provided on both sides. The circulator's declaration must follow the last signature block.

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

I \_\_\_\_\_ Declare:  
(print name)

1. I am 18 years of age or older.
2. My residence address is \_\_\_\_\_ in \_\_\_\_\_ County, California, and I am a registered voter in (insert electoral jurisdiction);
3. I personally circulated the attached petition for signing.
4. I witnessed each of the appended signatures being written on the petition and to my best information and belief, each signature is the genuine signature of the person whose name it purports to be; and
5. The appended signatures were obtained between the dates of \_\_\_\_\_ and \_\_\_\_\_ inclusive.  
(Starting date) (Ending date)

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

Executed on \_\_\_\_\_ at \_\_\_\_\_, California.  
(Date) (City)

\_\_\_\_\_  
(Signature)

It is recommended that you leave a 1" margin at the top, and a ½" margin on the left, right and bottom. The full text of the proposed measure must also appear on the petition. You may want to print the text on the back side; however, the Ballot Title and Summary must appear above the text of the proposed measure. §9105(c)

# Random Sample vs. Full Count



Laws

- Within 30 working days, the registrar will use a random sampling method to ascertain the number of valid signatures
- If the sample only finds that the validity rate is 95-110%, then a full count is required
- If a full count is required, they have an additional 60 working days to examine each signature
- Collecting enough raw signatures is essential to avoid a full count!

# Grassroots Signature Gathering

Strategy

## Pros

- Invests and Strengthens local movements
- Builds capacity and leadership
- Higher validity rate
- Demonstrates local support

## Cons

- Intensive oversight
- Less accountability = more risk
- Requires existing memberships & infrastructure



# Paid Signature Gathering

Strategy

## Pros

- Turnkey operation
- Ensures signatures
- Accountable

## Cons

- Expensive
- Lower validity rate
- Doesn't build local movement

# Tips on Signature Collection (1/6)



## Tips

- Volunteers should be familiar with what are the features of a petition
  - Its format
  - Lines required to be filled by voters
    - Printed name, signature, street address, and city)
  - Lines required to be filled by the petition gather

# Tips on Signature Collection (2/6)



## Tips

- Know what a good signature is for a higher validity rate
  - Legible handwriting
  - Registered at address given (No PO boxes!)
    - Correct jurisdiction
  - Cursive signature
  - Did not sign previously
  - Black ball point pen used
- **Most invalid signatures are from the wrong address.**

## Tips on Signature Collection (3/6)



### Tips

- **Keep it simple**, focus on getting the signature before talking about the measure
- Ask if they live here instead of if they are registered
- Hand the clipboard to the voter, don't hold it against your chest
  - Have a pen in the other hand
- Make sure they are registered at the address provided after you've engaged them.

## Tips on Signature Collection (4/6)



### Tips

- If necessary, pitch them once they've been handed the board.
- Have two or three boards
  - Foam boards with rubber bands are lighter
- Don't fill in info for voters afterwards
  - Could cause it to be struck
  - An incorrect or missing unit number **does not** invalidate a signature



# Tips on Signature Collection (5/6)

## Tips

- Know the difference between public and private property
  - Public = parks, sidewalks, outside of government buildings
  - Private = grocery store parking lots, businesses
- Gathering on private property is okay if it is a quasi public square (e.g. has benches)
  - Better to ask for forgiveness than permission as employees do not always know the law



# Tips on Signature Collection (6/6)

## Tips

- Trader Joe's tends to be more sensitive than other grocery stores
- Assert your rights, you won't be arrested
- Gather in the highest density city within the county
  - NIMBY cities are harder
- Events are good
- 99 cent stores and Walmarts are good
- Avoid tourist areas
- Going door-to-door with a walk list is also viable



# Make it Simple: Preparing for Signature Gathering

- ☐ Introduction
- ☐ Review the Rules
- ☐ Engagement
- ☐ Role play
- ☐ Packets
- ☐ Check Out



Training

# First Step: Data Management

- Hire data and field staff
- Put Everything in VAN/PDI or your Preferred Database
  - However you get it in just get it in
  - The VAN has a signature
  - Scanning
  - Paid Entry
- Know your numbers



Distribution  
and Quality  
Control

# Set Strong Quality Control Processes



Distribution  
and Quality  
Control

- Untrained volunteers should NEVER receive petitions
- Require daily reports from every circulator and every grassroots partner
- Clear statewide reporting structure with key staff roles and responsibilities
- Set expectations for accountability

# Accountability

Accountability

## SIGN UP TO GET MORE INFORMATION ABOUT OUR CAMPAIGN

Name

Cell Phone ☐ Send me text updates\*

Email

Name

Cell Phone ☐ Send me text updates\*

Email

Name

Cell Phone ☐ Send me text updates\*

Email

*\*This is a free service from the campaign. We will not sell or share your information. Standard text messaging rates do apply.*

Petition Number

100001

100001

DO NOT REMOVE THIS SECTION

# Verifying Signatures

- Train circulators well
- Remove bad circulators
- Spot check signatures
- Verify
- Check and verify paid effort

Verification



**KEEP  
CALM**

AND  
AND VALIDATE

# Storage

- Security is important
- Store your petitions safely
- Develop transportation and delivery plan

Storage  
and  
Delivery





# Delivery

Storage  
and  
Delivery



# Questions?

