





Initiative / Referendum Handbook

THIS SPECIAL DISTRICT INITIATIVE/REFERENDUM **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.

March 2013



REGISTRAR OF VOTERS

1300 South Grand Avenue, Bldg. C Santa Ana, California 92705 (714) 567-7600 TDD (714) 567-7608 FAX (714) 567-7627 www.ocvote.com **NEAL KELLEY** Registrar of Voters

Mailing Address: P.O. Box 11298 Santa Ana, California 92711

Dear Orange County Voter:

Thank you for your interest in our Special District Initiative/Referendum Handbook. This handbook has been designed to assist you in the process of initiating and circulating petitions.

You will find detailed information on the process; laws that govern Special District initiative and referendum petitions and more throughout this handbook. In addition, you can find added resources on our website by visiting **ocvote.com**.

This 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.

We strongly recommend that any interested party obtain legal advice, to assist in complying with applicable California laws, including the California Elections Code and the California Government Code.

Our mission is to serve the registered voters of Orange County in a uniform, consistent and accessible manner with the highest level of integrity.

Sincerely,

Neal Kelley Registrar of Voters

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DEFINITIONS

District ElectionsFor the purposes of initiative and referendum, includes the county elections official, or other officer or board charged with performing		
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Proposition 218	The "Right to Vote on Taxes Act", a California Constitutional Amendment passed by the voters in November of 1996, giving voters the ability to repeal or reduce any existing local tax, assessment, or charge through the initiative process Proposition 218
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 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
Rebuttal Argument	A document refuting a Direct Argument in Favor or a Direct Argument Against a measure being placed on the ballot Elec. Code § 9317
Referendum	A document protesting a legislative act to be presented to the governing board and possibly to the voters of the jurisdiction Elec. Code §§ 9144, 9340
Residence	"Residence" for voting purposes means a person's domicile The 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 Elec. Code § 349
Section of a Petition	Page of a petition
Signature Verification	Comparing a person's signature on a petition with the voter registration records' signature on file to determine if they match
Special Tax	A tax whose revenues are used for specific purposes rather than used for any governmental purpose Legislative Analyst's Office 12/96
Statement of Reasons	A printed statement which accompanies the Notice of Intention stating why the proponents are circulating the petition Elec. Code § 9302
Tax	A charge on an individual or business that pays for governmental services to facilities that benefit the public broadly Examples of taxes include the property tax, sales tax, business license tax, hotel occupancy tax, and utility users' tax Legislative Analyst's Office 12/96

WHAT IS AN INITIATIVE?

An initiative is the power of the electors to propose a new ordinance by which they will be governed. In addition to any other method provided by law, ordinances may be enacted by any district pursuant to Division 9, Chapter 4, Article 1 of the Elections Code, except that this article shall not apply to:

- Irrigation districts;
- A district formed under a law that does not provide a procedure for elections;
- A district formed under a law which does not provide for action by ordinance;
- A district governed by an election procedure that permits voters, in electing the district's directors or trustees, to cast more than one vote per voter; or
- A district in which the directors are empowered to cast more than one vote per director, when acting on any matter. Elec. Code § 9300

Any proposed ordinance may be submitted to the governing board of the district by an initiative petition filed with the district's election official. **Elec. Code § 9301**

WHOM DO I CONTACT FOR INFORMATION ON INITIATIVES?

The **district's elections official** of the jurisdiction in which the petition is being distributed is the contact person in the case of the circulation and filing of a special district initiative petition. Contact the elections official of the appropriate district for this information.

The **Registrar of Voters** is the elections official in the case of a countywide initiative. Contact the Registrar of Voters at ocvote.com/election-library or (714) 567-7600.

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.com/community/city-clerk-partnership/.



HOW LONG WILL THE PROCESS TAKE?

- The clock starts ticking when the Notice of Intention and Statement of Reasons are published or posted, or both.
 Elec. Code § 9306
- To give you an idea of how long the process will take, an example of a timeline has been prepared. (See Exhibit A, page 28, 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 district elections official can provide you with helpful information to assist you in understanding the steps necessary to initiate, circulate, and file special district initiative petitions.
- Become familiar with the process by reading this handbook, Elections Code sections 9300 through 9405, Proposition 218, and calling the district election official, if you have specific questions.



All parties involved in a special district 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...PREPARATION AND PUBLICATION/POSTING OF NOTICE OF INTENTION

- The special district initiative process begins by the proponents of the measure publishing a Notice of Intention to circulate an initiative petition. Exhibit B, page 29, of this handbook, is an example of the Notice of Intention.
- The Notice of Intention shall be accompanied by a printed statement stating the reasons for the proposed petition. The printed statement shall not exceed 500 words. The notice shall be signed by at least one, but not more than five, proponents, and shall be in substantially the following form:

"Notice of Intention to Circulate Initiative 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 (insert purpose of measure). A Statement of the Reasons of the proposed action as contemplated in the petition is as follows:"

Elec. Code § 9302

- The Notice of Intention and Statement of Reasons shall be published or posted, or both, as follows:
 - a. If there is a newspaper of general circulation within the district, the notice and statement shall be published at least once.
 - b. If the petition is to be circulated in a district in which there is no newspaper of general circulation, the notice and statement shall be published at least once in a newspaper of general circulation within the county in which the district is located, and the notice and statement shall be posted in three public places within the district.

STEP 3...FILING OF NOTICE OF INTENTION AND STATEMENT OF REASONS



DON'T FORGET.....

Within 10 days after the date of publication or posting, or both, of the Notice of Intention and Statement of Reasons, the proponent(s) shall file a copy of the notice and statement as published or posted, or both, together with an affidavit made by a representative of the newspaper in which the notice was published or, if the notice was posted, by a voter of the district certifying to the fact of publication or posting. The affidavit, together with a copy of the Notice of Intention and Statement of Reasons, shall be filed with the district elections official.

Elec. Code § 9304

PHASE 2 -- THE PETITION YOU'RE MAKING PROGRESS!

STEP 1...FORMATTING THE PETITION

The petition format is described in Elections Code §§ 100, 9020, 9022, 9301, 9302, 9305, and 9307. This format is mandated and must be used. See Exhibit E, page 32, for a sample of the special district initiative format.

- The Notice of Intention follows the heading. The law does not specify the type size for the Notice of Intention, but it should not be less than 8 point. Each section (page) of the petition shall bear a copy of the Notice of Intention and Statement of Reasons. If the petition is two-sided, the Notice of Intention and Statement of Reasons must be included on both sides.
 Elec. Code § 9305
- Insert the <u>required</u> Statement of Reasons not to exceed 500 words in length.
 Elec. Code § 9302
- Format the signature on the Notice of Intention as "s/Name, Address, City, State, Zip" on the petition (Substitute "s" for the proponent(s)' actual signature).



Tips on Special District Initiative Petition Format

- The petition can accompany any amount of signatures.
- The petition can be printed on 8 $\frac{1}{2}$ " x 11" or 8 $\frac{1}{2}$ " x 14" or larger.
- The petition can be single-side or doubled-sided. However, if double-sided,

make sure the Notice of Intention and Statement of Reasons appear on both sides of the petition.

The petition can be printed on color paper; however, neon colors are not recommended.

STEP 2...SIGNATURE SPACE

CAUTION

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 no 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

IMPORTANT: "Unable to personally affix" as used above and in Section 100.5 means that the individual is "disabled". <u>Capo for Better Representation v.</u> <u>Kelley</u>, 158 Cal. App. 4th 1455, 1463 (2008)

 Pursuant to the California Supreme Court's decision in <u>Assembly v. Deukmejian</u>, 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. • The petition format shall be substantially in the following form:

NAME	RESIDENCE ADDRESS	FOR OFFICIAL USE ONLY
1.		
PRINT NAME	RESIDENCE ADDRESS ONL	Y
SIGNATURE	CITY	ZIP
2.		
PRINT NAME	RESIDENCE ADDRESS ONL	<u>Y</u>
SIGNATURE	CITY	ZIP

- 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 district elections official or the Registrar of Voters 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 12-point type, prior to that portion of the petition for voters' signatures, printed names, and residence addresses, a notice to the public (See Exhibit E, page 32).

"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, 9022, 9301, 9307

- The declaration must also include:
 - (a) that the circulator is a person who is a voter or who is qualified to register to vote in the district;
 - (b) that the circulator circulated that section and witnessed the appended signatures being written;
 - (c) 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;
 - (d) that the circulator certifies to the content of the declaration as to its truth and correctness, under penalty of perjury. The circulator shall state the date and the place of execution on the declaration along with his or her signature.
 Elec. Code §§ 102, 104, 9022, 9301, 9305, 9307
- If the petition is double-sided, the declaration may be omitted on the front side of the petition if signature spaces are provided on both sides of the petition. The circulator's declaration must follow the last signature block on the back-side of the petition.
- If the petition is single-sided, but two pages, the declaration may be omitted from the first page, provided that signature spaces are on both pages. <u>The</u> <u>circulator's declaration must follow the last signature block on the</u> <u>second page and the two pages must be stapled together.</u>

STOP

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'RE ALMOST READY!



You cannot start to circulate the petition for signatures among the voters of the special district until after publication or posting of the Notice of Intention and the Statement of Reasons. Elec. Code § 9305

Remember: Each section (page) of the petition shall bear a copy of the Notice of Intention and the Statement of Reasons. Elec. Code § 9305

- There are two important pieces of information you need to know before circulating a special district initiative petition:
 - (1) How many signatures are required to qualify the special district initiative?
 - (2) How many days do you have to get the job done?

STEP 1...NUMBER OF SIGNATURES NEEDED TO QUALIFY A SPECIAL DISTRICT INITIATIVE

- The district elections official will advise the proponents of the number of signatures required to sign the petition by determining 10% of the registered voters in the district, where the total number of registered voters is less than 500,000, as of the time of the last report of registration by the county elections official to the Secretary of State made prior to the publication or posting of the Notice of Intention to circulate the initiative petition. Elec. Code §§ 9310
- The district elections official will advise the proponents of the number of signatures required to sign the petition by determining 5% of the registered voters in the district, where the total number of registered voters is 500,000 or more, as of the time of the last report of registration by the county elections official to the Secretary of State made prior to the publication or posting of the Notice of Intention to circulate the initiative petition. Elec. Code §§ 9310, 9311
- In order to have the ordinance on a special election ballot, a proponent must request a special election in the petition. However, Elections Code section 9311(b) provides an option for a special district board to set a special election even if one is not requested in the petition. Elec. Code §§ 9310, 9311
- See pages 13, 18, and 19 for more information on number of signatures required.



<u>IMPORTANT!</u> Proposition 218 changed the number of signatures required to put an initiative petition to reduce taxes, fees, and assessments on the ballot. See page 25 of this handbook for more information.

STEP 2...DEADLINE TO FILE THE PETITION

- You need to secure signatures and present the petition, together with all sections (pages), to the district elections official for filing within 180 days from the date of publication or posting, or both, of the Notice of Intention and Statement of Reasons. If the petitions are not filed within the time permitted by this section, the petition and its sections shall be void for all purposes. Elec. Code § 9306
- All sections (pages) of the petition **must** be filed at the same time.

Elec. Code § 9306

NOW YOU'RE READY TO CIRCULATE THE PETITION WHO CAN CIRCULATE THE PETITION?

A person who is 18 years of age or older may circulate an initiative or referendum petition.

• 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.

Elec. Code § 9607

• A proponent of an initiative measure shall execute and submit a signed statement acknowledging that it is a misdemeanor to knowingly or willfully allow signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot. This statement should be kept on file by the district elections official. (See Exhibit D, page 31).

Elec. Code § 9608

- Prior to allowing a person to circulate an initiative petition for signatures, the person, company official, or other organizational officer who is in charge of signature gathering shall execute and submit to the proponents a signed statement acknowledging that it is a misdemeanor to knowingly or willfully allow signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot. This statement shall be kept on file by the proponents of the measure. (See Exhibit G, page 34).
- Prior to soliciting signatures on an initiative petition, a circulator shall execute and submit to the person, company official, or other organizational officer who is in charge of signature gathering a signed statement acknowledging that it is a misdemeanor to knowingly or willfully allow signatures on an initiative petition to be used for any purpose other than qualification of the proposed measure for the ballot. This statement shall be kept on file by the person, company official, or other organizational officer who is in charge of signature gathering. (See Exhibit F, page 33). This section does not apply to unpaid circulators of state or local initiative petitions.
- The above-mentioned statements must be kept on file 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 district elections official.
- Failure to comply with Elections Code sections 9608, 9609, and 9610 shall not invalidate any signatures on a state or local initiative petition.

Elec. Code §§ 9608, 9609, 9610 12

WHO CAN SIGN THE PETITION?

Only persons who are eligible registered voters of the district at the time of signing the petition are entitled to sign it. Elec. Code § 100

A person who submits his or her affidavit of registration pursuant to subdivision (d) of section 2102 is not eligible to sign a petition or paper unless at the time of signing he or she is 18 years of age. 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

IMPORTANT TIPS ON SIGNATURE GATHERING

The signers of a special district 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 (see page 7 for definition of "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

- It is recommended to obtain 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 district, or for other reasons.
- You can register a voter at the same time they sign the special district initiative petition. The registration must be received by the elections official by the time the petition is filed with the elections official.
- Make sure the voter is registered and lives in the special district. Resources can be purchased from the Registrar of Voters' office to assist in this process, including precinct maps (contact Map Unit at 714-567-7586); 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 714-567-7615); 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.

CAN SIGNATURES BE WITHDRAWN FROM AN INITIATIVE OR REFERENDUM PETITION?

- Any voter who has signed an initiative or referendum petition, and who subsequently wishes his or her name withdrawn, may do so by filing a written request for the withdrawal with the appropriate elections official.
 Elec. Code §§ 103, 9602
- This request shall be filed in the elections official's office prior to the date the petition is filed. Elec. Code §§ 103, 9602



CAN A MEASURE BE WITHDRAWN BEFORE THE PETITION IS FILED?

• Notwithstanding any other provision of law, any person may engage in good faith bargaining between competing interests to secure legislative approval of matters embraced in a local initiative or referendum measure. The proponents may, as a result of these negotiations, withdraw the measure at any time before filing the petition with the appropriate elections official.

Elec. Code § 9604

 Withdrawal of a local initiative or referendum measure shall be effective upon receipt by the appropriate local elections official of a written notice of withdrawal, signed by all proponents of the measure. Elec. Code § 9604

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.
- The petition, including all sections, must be filed with the district elections official **within 180 days** from the date of publication or posting, or both, of the Notice of Intention and Statement of Reasons. **Elec. Code § 9306**

STEP 2...MEETING THE DEADLINE

- 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 § 9306

STEP 3...EXAMINATION BY THE DISTRICT ELECTIONS OFFICIAL

- The district elections official will ask the filer to provide the number of sections (pages in a single petition) and number of signatures. It is recommended that the petitions be separated in stacks reflecting the number of signers on each section (all sections with one signature in one stack, all with two signatures in another stack, etc.).
- This process assists the district elections official 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 the number of signatures appears to be equal or greater than the number required, the district elections official shall accept the petition for filing.
- The district elections official will provide the proponents with the deadline for the verification of signatures (30 days from the date of filing, excluding Saturdays, Sundays, and holidays).
 Elec. Code §§ 9308, 9309
- The district elections official may contract-out the process of verification of signatures. If this is the case, the initiative petition is filed with the district elections official and the deadline for the signature verification remains the same (30 days from the date of filing with the district elections official, excluding Saturdays, Sundays, and holidays).

PHASE 5 – VERIFICATION OF SIGNATURES

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

100% Verification of Signatures:

The elections official must verify every signature submitted if less than 500 signatures are submitted.
 Elec. Code §§ 9308, 9309

Random Sampling Verification of Signatures:

- If more than 500 signatures are submitted, then the elections official may choose to use a random sampling signature verification.
 Elec. Code § 9309
- The random sampling shall include an examination of at least 500, or 3% of the signatures, whichever is greater.
 Elec. Code § 9309
- If the random sampling technique is used, the elections official 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 is deemed to be valid.

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			
 CALCULATE Raw Count (24,034) x <u>Sufficient in Sample (516)</u> = V (17,178) Sample (722 [3%] or 500, whichever is greater) DIVIDE <u>Raw Count (24,034)</u> = A (33.2881) Sample (722) 			
 MULTIPLY A (33.2881) x (A – 1) (32.2881) = B (1074.8095) MULTIPLY			
5. SUBTRACT V (17,178) – C (2,150) = Corrected Valid (15,028) Elec. Code § 20540			

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 district elections official must examine and verify each signature filed. Elec. Code § 9309
- Additional time is allowed for the 100% signature verification after the random sampling has been conducted. The district elections official 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 § 9309

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

- The district elections official shall certify the petition to be insufficient.
 Elec. Code § 9309
- 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.

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 district elections official must certify the results of the examination to the governing board of the district at its next regular meeting. Elec. Code § 9308, 9309



PHASE 6 – CERTIFICATION

 If the petition is found to have insufficient signatures, the district elections official 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. A new petition on the same subject may be filed at a later date.

Elec. Code § 9309

- If the petition is found to have sufficient signatures, the district elections official will certify the results by preparing a certificate. You, the proponent will be notified of this result.
 Elec. Code § 9309
- If the petition is found sufficient, the district elections official shall certify the results of the examination to the governing board of the district at its next regular meeting.



Who May Examine a Petition?

If a petition is found to be <u>sufficient</u> by the district elections official, proponents and members of the public may <u>not</u> examine the petition. **Gov't § 6253.5**

If a petition is found to be <u>insufficient</u> by the district elections official, 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 <u>must</u> be allowed to examine the petition signatures in order to ascertain which signatures were disqualified and the reasons therefor. **Gov't § 6253.5**

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. **Gov't § 6253.5**

The district elections official shall preserve in his or her office all initiative or referendum 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 district elections official's final examination of the petition. **Elec. Code § 17200**

PHASE 7 – SPECIAL DISTRICT GOVERNING BOARD OPTIONS

Special District Initiative Petition Signed by 10% or 5%...

- If the district initiative petition is signed by voters not less in number than 10% of the voters in the district, where the number of registered voters is less than 500,000, or not less in number than 5% of the voters in the district, where the total number of registered voters is 500,000 or more, and the petition contains a request that the ordinance be submitted immediately to a vote of the people at a special election, the district board shall do either of the following:
 - (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 § 9310
 - (b) Immediately call a Special Election pursuant to subdivision (a) of Elections Code section 1405, at which the ordinance, without alteration, shall be submitted to a vote of the district.



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 an initiative measure be held by one jurisdiction during any 180-day period. Elec. Code § 1405

Special District Initiative Petition Does Not Request A Special Election...

- If the special district initiative petition does not request a special election, the district board shall do either of the following:
 - (a) Adopt the ordinance, without alteration, either at the regular meeting at which the certification of the petition is presented, or within10 days after it is presented.
 Elec. Code § 9311
 - (b) Submit the ordinance, without alteration, to the voters pursuant to subdivision (b) of Elections Code section 1405, unless the ordinance petitioned for is required to be, or for some reason is, submitted to the voters at a special election pursuant to subdivision (a) of Elections Code section 1405.

NOTE: The election shall be consolidated with the next statewide election occurring not less than 88 days after the date of the district governing board's order.

Elec. Code § 1405

CAN A MEASURE BE WITHDRAWN AFTER A SPECIAL ELECTION ORDER?

Notwithstanding any other provision of law, whenever a legislative body has ordered that a measure or proposal be submitted to the voters of any jurisdiction at a special election, the order of election shall not be amended or withdrawn after the 83rd day prior to the election. This order of election shall be amended or withdrawn by the filing of a resolution by the legislative body stating the specifics concerning the amendment or withdrawal. The resolution shall be filed with the district elections official not later than the 83rd day prior to the election. **Elec. Code § 9605**



There is no provision for withdrawing a measure after it is ordered on the ballot at a regularly scheduled election.

PHASE 8 -- ELECTION

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

SUBMISSION OF DIRECT ARGUMENTS

- The persons filing an initiative petition may file a written argument in favor of the ordinance. Elec. Code § 9315
- No more than five signatures shall appear with any argument in favor submitted.
 Elec. Code §§ 9302, 9315
- The district board may submit an argument against the ordinance.

Elec. Code § 9315

- The district board <u>must</u> take a formal position (by taking action at a meeting) before signing an argument against an initiative measure. The board as a whole may submit an argument against a measure. The board may authorize any number of individual board members to sign the argument. There is no limit to the number who can sign, but it must be clear that the argument is on behalf of the board rather than on behalf of those individual members.
- No arguments shall exceed 300 words in length. Elec. Code § 9315
- Both arguments shall be printed and mailed to each voter with the sample ballot for the election.
 Elec. Code § 9315
- Based on time reasonably necessary to prepare and print the arguments, analysis, and sample ballots, and to permit the 10-calendar-day public examination for the election, the elections official shall fix/determine a reasonable date prior to the election after which no arguments for or against any special district measure may be submitted for printing and distribution to the voters – usually 88 days prior to election.

Elec. Code § 9316

- 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.
- Arguments may be changed or withdrawn by their proponents until and including the date fixed by the district elections official.

Elec. Code §§ 9316, 9601



SUBMISSION OF REBUTTAL ARGUMENTS

- When an argument in favor and an argument against a measure have been selected for publication in the voter information pamphlet, the elections official 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 § 9317
- 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 § 9317
- The rebuttal arguments shall be submitted to the elections official no later than a date designated by the elections official. Elec. Code § 9317

Impartial Analysis by County Counsel...

- Whenever any petition is submitted to the voters (except voters in a water district), the district elections official shall transmit a copy of the measure 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 on the ballot nor in the sample ballot pamphlet, there shall be printed immediately below the impartial analysis, in no less than 10-point bold type, a legend substantially as follows:

"The above statement is an impartial analysis of Ordinance or Measure _____. If you desire a copy of the ordinance or measure, please call the district elections official's office at (insert telephone number) and a copy will be mailed at no cost to you." Elec. Code § 9313

Impartial Analysis for Petitions Submitted to Voters Within a Water District...

• Whenever any petition is submitted to the voters of a water district, the district elections official shall transmit a copy of the measure to the legal counsel for the water district, or to the county counsel if there is no legal counsel for the water district, of the county that contains the largest number of registered voters of the water district. If there is a legal counsel for the water district, he or she shall prepare, subject to review and revision by the county counsel, 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. The analysis shall not exceed 500 words in length.

- If there is no legal counsel for the water district, or if the legal counsel for the water district and the county counsel so agree, the county counsel shall prepare the impartial analysis.
 Elec. Code § 9314
- In the event the entire text of the measure is not printed on the ballot nor in the sample ballot pamphlet, there shall be printed immediately below the impartial analysis, in no less than 10-point bold type, a legend substantially as follows:

"The above statement is an impartial analysis of Ordinance or Measure ____. If you desire a copy of the ordinance or measure, please call the district elections official's office at (insert telephone number) and a copy will be mailed at no cost to you." Elec. Code § 9314

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 district.

Elec. Code § 9320

• The ordinance shall be considered as adopted upon the date the vote is declared by the district board, and shall go into effect 10 days after that date.

Elec. Code § 9320

- 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 § 9321
- The enacting clause of an ordinance submitted to the voters of a district shall be substantially in the following form:

"The people of the District ordain as follows:"

Elec. Code § 9322

 No ordinance proposed by initiative petition and adopted either by the district board 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 district board

PROPOSITION 218

On November 5, 1996, California voters passed **Proposition 218**, the "**Right to Vote on Taxes Act**." This California Constitutional Amendment protects taxpayers by limiting the methods by which local governments can increase taxes, fees, and charges without taxpayer consent. Proposition 218 requires voter approval prior to any imposition or increase of general taxes, assessments, and certain user fees. It shifts most of the power over taxation from locally elected governing boards to residents and property owners.

Proposition 218 applies to each of California's cities, counties, special districts, schools, community college districts, redevelopment agencies, and regional organizations.

Voter Approval on Taxes: Proposition 218 requires all local governments, including charter cities, to get majority vote approval for new or increased general taxes.

<u>Restricts Timeframe to Call an Election</u>: Proposition 218 limits local government's authority to call an election to raise revenues. Except in cases of emergency, local governments now many hold elections on general taxes only once every two years (consolidated with an election for members of the governing board.)



Initiative Power to Repeal: Proposition 218 allows voters to repeal or reduce any existing local tax, assessment, or charge through the voter initiative process.

In addition Proposition 218 changes the number of signatures required to put an initiative petition to reduce taxes, fees, and assessments on the ballot. It ties the number of signatures needed to the maximum required for statewide statutory initiatives. This means that the required number of signatures to qualify an initiative pertaining to the reduction of taxes, fees, and assessments for the ballot would be five percent of the total number of votes cast for all candidates for Governor at the last gubernatorial election within the local government jurisdiction involved. By comparison, the number of signatures needed for a normal initiative petition in a district is ten percent of the registered voters where the total number of registered voters is less than 500,000.

Neither the Legislature nor any local government charter shall impose a signature requirement higher than that applicable to statewide statutory initiatives.

Cal. Const. art. 13C, § 3, Elec. Code, § 9035

SPECIAL DISTRICT REFERENDUM

Submission of Legislative Questions by Governing Board...

The governing board of any district to which Elections Code section 9340 applies may refer legislative questions to the voters of the district in the same manner as the Board of Supervisors may refer county questions pursuant to Elections Code section 9140. Elec. Code § 9342

Petition Protesting Governing Board's Legislative Act...

Voters of any district that is a local public entity, as defined by section 900.4 of the Government Code and to which Elections Code section 9300 applies, have the right to petition for a referendum on legislative acts. If a petition protesting against a legislative act is presented to the governing board prior to the effective date of the act, the act shall be suspended and the board shall reconsider it. The petition shall be signed by voters of the district equal in number to at least 10 percent of the entire vote cast within the district for all candidates for Governor at the last gubernatorial election.

Elec. Code §§ 9144, 9340

Form of Petition...

The same provisions of the Elections Code that govern county referendum petitions and the duties of the district's elections official with respect to initiative petitions also govern referendum petitions and the duties of the district's elections official with respect to referendum petitions. Elec. Code §§ 9146, 9340

The heading of a proposed referendum measure shall be in substantially the following form:

Referendum Against an Ordinance Passed by the Special District Governing Board

Each section of the referendum petition shall contain the title and text of the ordinance which is the subject of the referendum. Elec. Code §§ 9147, 9340

Protest of Legislative Act Submitted to Voters...

If the governing board does not entirely repeal the legislative act against which a petition is filed, the board shall submit the legislative act to the voters either at the next regularly scheduled district election, or at a special election called for that purpose, not less than 88 days after the date of the order. The legislative act shall not become effective unless and until a majority of the voters voting on the legislative act vote in favor of it. **Elec. Code §§ 9145, 9147, 9340**

Ordinances Authorizing the Issuance of Revenue Bonds...

Ordinances authorizing the issuance of revenue bonds by a special district as part of a joint powers entity pursuant to Government Code section 6547 shall not take effect for 60 days. Elec. Code § 9341

Number of Signatures Required for a Referendum...

When the number of votes cast for all candidates for Governor at the last gubernatorial election within the boundaries of the special district exceeds 500,000, the ordinance is subject to referendum upon presentation of a petition bearing signatures of at least 5 percent of the entire vote cast within the boundaries of the special district for all candidates for Governor at the last gubernatorial election. **Elec. Code § 9341**

When the number of votes cast for all candidates for Governor at the last gubernatorial election within the boundaries of the special district is less than 500,000, the ordinance is subject to referendum upon presentation of a petition bearing signatures of at least 10 percent of the entire vote cast within the boundaries of the special district for all candidates for Governor at the last gubernatorial election. **Elec. Code § 9341**

EXHIBIT A

SPECIAL DISTRICT INITIATIVE PROCESS TIMELINE

This sample timeline is an example, but does not represent an exact timeline for your particular special district 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 and Statement of Reasons are filed with the district elections official.

Within 10 days	after the date of publication or posting, or both, of the Notice of Intention and Statement of Reasons, the proponents must file a copy of the Notice of Intention and Statement of Reasons as published or posted, or both, together with proof of publication with the district elections official.	
Within 180 days	from the date of publication or posting, or both, of the Notice of Intention and Statement of Reasons, signatures shall be secured and the petition shall be presented to the district elections official. Remember: Prior to circulation of the petition, the Notice of Intention and Statement of Reasons must be published and proof of publication must be filed with the district elections official.	
*Within 30 days (Excluding Saturdays Sundays, and holidays)	from the date the petition is filed, the district elections official, or an entity under contract by the district, will verify and certify the signatures.	
Within 10 days	after the certification of the petition is presented at a regular meeting, the special district board shall either adopt the ordinance, without alteration, or immediately order that the ordinance without alteration, be submitted to the voters at a special election or the next statewide election, pursuant to Elections Code § 1405(a) or (b).	
	If the proposed ordinance goes to election, there are additional deadlines, including submission of direct and rebuttal arguments, submission of impartial analysis, public examination of arguments and impartial analysis, and mailing of sample ballot pamphlets. 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 district board, and shall go into effect 10 days after that date.	
*After the random sampling has been conducted, if it is determined a 100% signature		

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

EXHIBIT B

EXAMPLE NOTICE OF INTENTION TO CIRCULATE PETITION

Notice is hereby given of the intention of the persons whose names appear hereon of their intention to circulate the petition within the _____ District 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:

(Insert **<u>REQUIRED</u>** Statement of Reasons for initiative not to exceed 500 words)

(Printed Name of Proponent)

(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 include the Statement of Reasons and be accompanied by a Statement of Acknowledgement.

EXHIBIT C

WORD COUNT GUIDELINES

Elec. Code § 9

The following guidelines are used by the Registrar of Voters for counting words on the Notice of Intention, ballot measure text, direct arguments, rebuttals, and other ballot enclosures. You should discuss with the special district elections official if these guidelines must be followed.

Each word shall be counted as one word except as specified on this page.

Punctuation is not counted. Symbols such as "&" (and), and "#" (number/pound) are not considered punctuationeach symbol is counted as one word
Dictionary words
Geographical names limited to states, counties, and cities – California, County of Orange, San Juan Capistrano, City of Breaone word
Abbreviations - UCLA, U.C.L.A., PTA, P.T.A., USMC, U.S.M.Cone 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
Dates – all digits (4/8/98) one word Words and digits (April 8, 1998)two words
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
Names of persons and thingseach word counts as one word Gus Enright (two words); L.A. Basketball Team (three words)
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/fax numbers one word
E-mail and Internet web site addresses one word

EXHIBIT D

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___

EXHIBIT E

EXAMPLE

INITIATIVE MEASURE TO BE SUBMITTED DIRECTLY TO THE VOTERS

(INSERT NAME OF DISTRICT)

Notice of Intention to Circulate Petition (See pages 4 and 5 for more information)

Notice is hereby given of the intention of the persons whose names appear hereon of their intention to circulate the petition within ______ District 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:

(INSERT REQUIRED STATEMENT OF REASONS NOT TO EXCEED 500 WORDS)

NOTICE TO THE PUBLIC

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.

	Office Use Only		
1.			
PRINT NAME	RESIDENCE ADDRE	ESS ONLY	
SIGNATURE	CITY	ZIP	
2.			
PRINT NAME	RESIDENCE ADDRE	ESS ONLY	
SIGNATURE	CITY	ZIP	

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

(Completed after above signatures have been obtained. See pages 8-9 for more information)

I Dec	clare:			
(print name)				
 My residence address is 		in	<u> </u>	
and I am a voter or qualified to vo	ote in (insert elector	al jurisdiction);		
2. I personally circulated the attach	ed petition for signi	ng.		
3. I witnessed each of the appende	d signatures being	written on the petition and to	my best information	
and belief, each signature is the				
4. The appended signatures were				
		(starting date) (end		
I declare under penalty of perjury ur	nder the laws of the	State of California that the for	pregoing is true and	
correct.				
Executed on	, 20 at	, Californ	ia.	
(month and day)	Executed on, 20 at, California.			
		(signature of cir	culator)	
			,	
It is recommended that you leave a 1" margin at the top, and a $\frac{1}{2}$ " margin on the left, right and				
bottom.				

EXHIBIT F

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___

EXHIBIT G

PERSON, COMPANY OFFICIAL, OR OTHER ORGANIZATIONAL OFFICER IN CHARGE OF SIGNATURE GATHERING STATEMENT OF ACKNOWLEDGEMENT

l,	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 t	o be used for any
purpose other than qualification of the proposed measure for the	oallot.

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)

Dated this _____ day of _____, 20___