


County, City, and District Initiative and Referendum Manual

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Elections Division
255 Capitol St NE, Suite 501
Salem, OR 97310-0722

 503 986 1518
fax 503 373 7414
tty 1 800 735 2900
www.oregonvotes.gov

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Using This Manual

This manual is intended to provide an overview of the county, city, and district initiative and referendum processes.

 Failure to follow the instructions completely may invalidate the petition.

This manual does not provide guidelines for:

→ district formations under ORS Chapter 198;



Contact the Special Districts Association of Oregon 800 285-5461.

→ city incorporations under ORS Chapter 221; or



Contact the county elections official.

→ county, city, or district governing body referrals.



See the County, City, and District Referral Manual available at www.oregonvotes.gov.

Icons

In this manual the following icons highlight information:



alert icon

indicates alert; warning; attention needed



info icon

indicates other information



deadline icon

indicates a deadline



petition committee icon

indicates a petition committee



example icon

indicates a detailed example of a concept, process or form



petition sheet icon

indicates a reference to a signature sheet



form icon

indicates a reference to a form



search icon

indicates information found elsewhere


Help

If you have questions about the material covered in this manual or need further help, please contact your local elections official or:

Elections Division
255 Capitol St NE, Suite 501
Salem, OR 97310

 **503 986 1518**
fax 503 373 7414

 elections.sos@sos.oregon.gov
 www.oregonvotes.gov


 **1 866 673 8683**
se habla español

tty 1 800 735 2900
for the hearing impaired

Getting Started

The initiative and referendum processes are methods of direct democracy that allow people to propose or amend local laws and charters or to adopt or reject an ordinance or other legislative enactment passed by a local governing body.

If chief petitioners gather and file the required number of signatures, the initiative or referendum is placed on the ballot for voters to adopt or reject.

-  Some special districts do not allow for initiative or referendum process. Check with your district to see if citizens of the district have the ability to enact legislation and exercise the power of initiative or referendum for that district.


Designating Chief Petitioners

An initiative or referendum may have up to three chief petitioners who are the individuals responsible for the preparation and organization of the petition.

In Oregon, any person, acting individually or on behalf of an organization, may be a chief petitioner.


Chief petitioners are responsible for:

- Filing the prospective petition ;
- designating whether petition circulators will be paid or unpaid;
- establishing a petition committee prior to approval to circulate;
- educating and monitoring circulators;
- collecting signatures; and
- submitting signatures.

-  Once cover and signature sheets have been approved to circulate an individual chief petitioner cannot be removed or changed. Chief petitioners that die after the petition is approved to circulate will be removed from the petition. Before cover and signature sheets are approved to circulate chief petitioners may be added or removed from the petition as long as one original chief petitioner remains throughout the entire process. If all original chief petitioners resign, the petition is void and must be re-filed.

Campaign Finance Reporting

Oregon campaign finance law may require chief petitioners to set up a campaign account, file a Statement of Organization designating a treasurer and file contribution and expenditure transactions with the State Elections Division.

-  The local elections official will not approve cover and signature sheets for circulation until a committee has been set up. A separate petition committee must be established and transactions filed for each initiative or referendum.


For further details on campaign finance reporting requirements, review:

-  The [Campaign Finance Manual](#) and the [ORESTAR User's Manuals](#) available at www.oregonvotes.gov.

Submitting Forms and Documents


Except for petition signature sheets, completed and signed forms or documents may be:

→ scanned and emailed;






 The local elections official may notify affected individuals by email.


→ faxed; or

→ mailed or personally delivered.

 Signatures sheets must be mailed or personally delivered to the local elections official by a chief petitioner or an authorized agent.

Filing Requirements

	Initiative Petitions	Referendum Petitions
 First Day to File Prospective Petition For all petition types	Any time	Any time after nonemergency ordinance or other legislative enactment adopted
County File with County Elections Official		
Required Signatures	*8% for charter amendment or adoption, all others *6%	*4%
 Signatures Due	2 years after final approval to circulate	90 days after nonemergency ordinance or other legislative enactment adopted
City File with City Elections Official		
Required Signatures	15% of voters registered in the city the day prospective petition filed	10% of voters registered in the city the day prospective petition filed
 Signatures Due	2 years after final approval to circulate	30 days after nonemergency ordinance or other legislative enactment adopted
District File with County Elections Official of the county where the administrative office of the district is located		
Required Signatures	*15%	*10%
 Signatures Due	2 years after final approval to circulate	30 days after nonemergency ordinance or other legislative enactment adopted
For the Port of Portland, a metropolitan service district organized under ORS chapter 268, a school district with more than 40,000 pupils, or a mass transit district in a metropolitan statistical area with a population exceeding 400,000		
Required Signatures	*6%	*4%
 Signatures Due	2 years after final approval to circulate	90 days after nonemergency ordinance or other legislative enactment adopted

 *The required number of signatures is a percentage of votes cast for governor in the relevant county, city, or district at the most recent election where a governor was elected to a full term. The calculation includes votes cast for each candidate whose name was printed on the ballot. Write-in votes are included however over and undervotes are not.

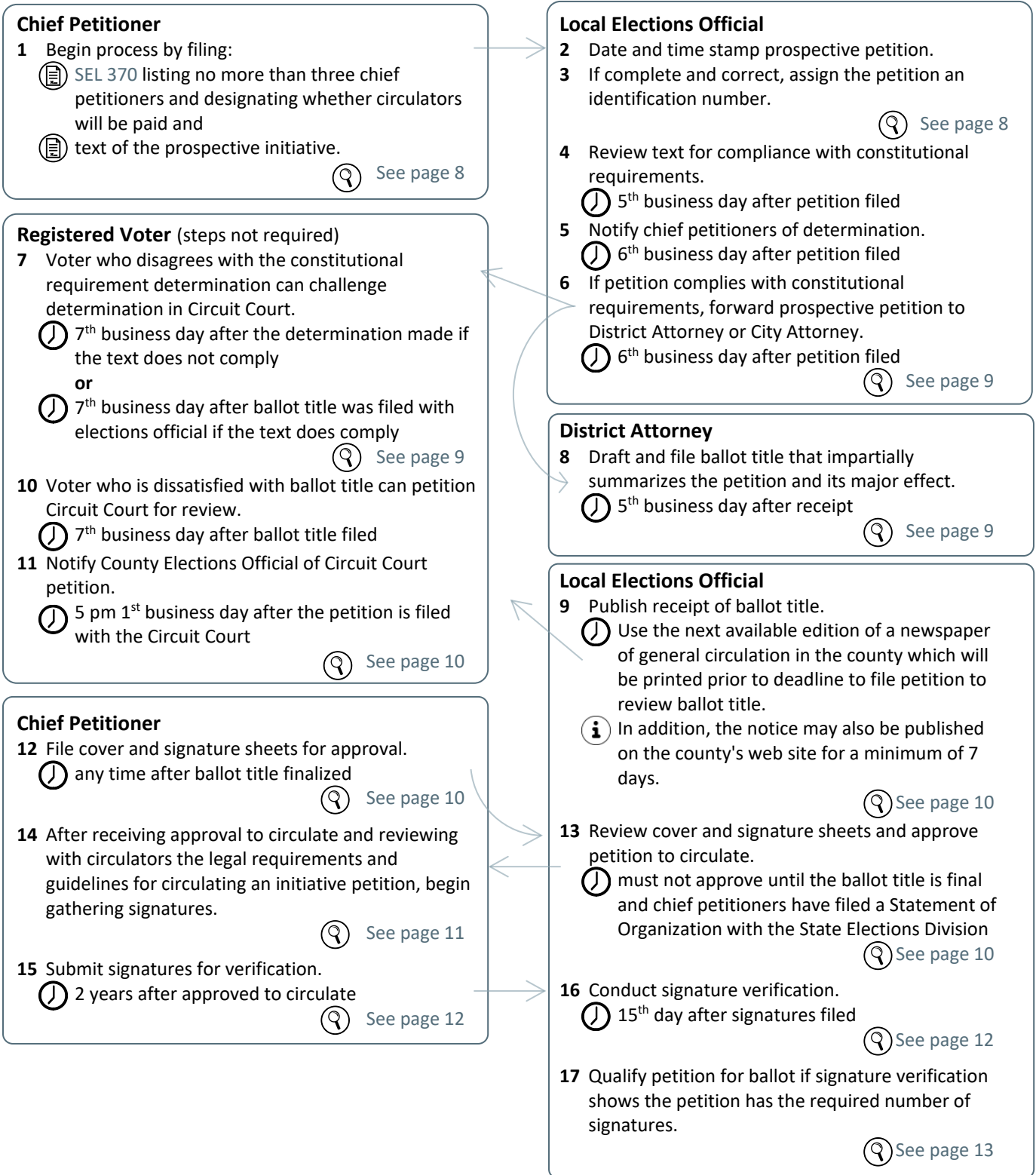
Initiative and Referendum Calendars

2022 🕒 Last day:	March 8	May 17	August 23	November 8
County Initiative or Referendum → for chief petitioners <i>to file signatures for verification</i> and qualify for this election	Does not apply	February 16	Does not apply	August 10
City Initiative → for the City Elections Official <i>to file qualified initiative</i> with governing body 📌 Both signature verification, which can take up to 15 days, and a meeting of the city governing body must occur by this date.	Does not apply	February 16	Does not apply	August 10
City Referendum → for chief petitioners <i>to file signatures for verification</i> and qualify for this election	Does not apply	February 16	Does not apply	August 10
District Initiative or Referendum District does not hold regular elections → for the County Elections Official <i>to complete signature verification and place qualified measure on the ballot</i> 📌 Signature verification, which can take up to 15 days, must be complete by this date.	Does not apply	March 17	Does not apply	September 8
District Initiative or Referendum District holds regular elections → for the District Elections Authority <i>to file Notice of Measure Election</i> with County Elections Official 📌 Signature verification, which can take up to 15 days, must be complete by this date.	Does not apply	March 17	Does not apply	September 8

2023 🕒 Last day:	March 14	May 16	August 22	November 7
County Initiative or Referendum → for chief petitioners <i>to file signatures for verification</i> and qualify for this election	Does not apply	February 15	Does not apply	August 9
City Initiative → for the City Elections Official <i>to file qualified initiative</i> with governing body	Does not apply	February 15	Does not apply	August 9
City Referendum → for chief petitioners <i>to file signatures for verification</i> and qualify for this election	Does not apply	February 15	Does not apply	August 9
District Initiative or Referendum District does not hold regular elections → for the County Elections Official <i>to complete signature verification and place qualified measure on the ballot</i>	Does not apply	March 16	Does not apply	September 7
District Initiative or Referendum District holds regular elections → for the District Elections Authority <i>to file Notice of Measure Election</i> with County Elections Official	Does not apply	March 16	Does not apply	September 7

📌 Statute does not specify a deadline for chief petitioners of **city initiatives, district initiatives, or referendums** to file signatures for verification. Coordinate signature submission with the filing officer to allow sufficient time for the 15 day signature verification process to be completed and, for city initiatives, submission to the city governing body prior to the deadlines outlined above.

Initiative Process Timeline



i To calculate deadlines, day one is the day after a complete and correct document is filed or the day after a document is due. If a statutory deadline falls on a Saturday, Sunday or holiday, the deadline becomes the following business day as provided for in ORS 246.021. However, constitutional deadlines that fall on a Saturday, Sunday or holiday become the previous business day.

Initiative Process

Except for state statutes relating to ballot title format and the statement of measures filed under ORS 254.095, 254.103, and 255.085, local charter or ordinance requirements may supersede some of the processes discussed in this manual.



Contact the local elections official for any applicable charter and ordinance requirements.



The deadlines for the procedures explained in the following sections are contained in the [Initiative Process Timeline](#) on page 7.

Filing a Prospective Petition

Oregon Constitution, Article IV, §1, Article VI, §10, ORS 250.165, 250.265, and 255.135

Before gathering the signatures necessary to place an initiative on the ballot, chief petitioners must file a prospective petition with the local elections official.

Chief Petitioners

- 1 Chief petitioners write the text of the proposed charter or ordinance, or the amendment to an existing charter or ordinance themselves, but are encouraged to seek legal help .
- 2 Chief petitioners designate no more than three people as chief petitioners and determine circulator pay status.



Form [SEL 370 Prospective Petition – Local Initiative or Referendum](#) must be completed and signed by all chief petitioners who must also designate circulator pay status. Incomplete forms will be rejected.



If any information provided on form [SEL 370](#) changes, including circulator pay status, all chief petitioners must complete and sign an amended form [SEL 370](#). The form must be filed within 10 calendar days of the change.

- 3 Chief petitioners file text of initiative petition and form [SEL 370](#) with local elections official.
- 4 Chief petitioners must set up a campaign account and file a Statement of Organization designating a treasurer with the Elections Division.



See [Campaign Finance Reporting](#) on page 4.

- 5 Chief petitioners may also authorize individuals to act on their behalf in most matters about the petition process by completing and filing:



Form [SEL 307 Agent Authorization](#).

Local Elections Official

After receiving the prospective initiative petition the **local elections official**:

- ✓ date and time stamps the prospective petition;
- ✓ reviews the forms for completeness and correctness;;
- ✓ if complete and correct, assigns the petition an identification number;
- ✓ scans and emails a date stamped copy of the [SEL 370](#) to orestar-support.sos@sos.oregon.gov; and
- ✓ reviews the text for compliance with procedural constitutional requirements.




Procedural Constitutional Review

Oregon Constitution, Article IV, §1, Article VI, §10 and ORS 250.168, 250.270, and 255.140

The Oregon Constitution established the following requirements for local initiative petitions:

- must have a single subject or closely related subject;
- must include the full text; and
- must be legislative rather than administrative in nature.

 The local elections official does not review the prospective petition for substantive constitutional or legal sufficiency.

After reviewing the text to determine whether the prospective initiative petition complies with constitutional requirements, the **local elections official**:

If text does not comply

- ✓ notifies chief petitioners of determination by certified mail, return receipt requested; or

If text does comply

- ✓ notifies chief petitioners of determination in writing and sends a copy of the text to the district attorney or city attorney for preparation of a ballot title.

Appeal

Any registered voter may appeal the local elections official's constitutional requirement determination by filing a petition with the Circuit Court for review.

 See the [Initiative Petition Process](#) outlined on [page 9](#) for the deadline to complete the procedural constitutional review and to challenge the ruling.

Ballot Title


ORS 250.035, 250.175, 250.195, 250.275, 250.296, 255.145, 255.155, and 255.215

A ballot title is a concise and impartial statement summarizing the initiative and its major effect that is printed on the reverse of all signature sheets used for circulation and on the ballot.

Format


After receiving the text of the prospective petition, the **district attorney or city attorney drafts and files a ballot title** with the local elections official. A ballot title includes:

- a caption that does not exceed 10 words describing the subject of the petition;
- a question that does not exceed 20 words plainly phrasing the main purpose of the petition so that an affirmative response to the question corresponds to a yes vote on the ballot; and
- a summary that does not exceed 175 words concisely and impartially summarizing the petition and describing its major effect.

 If the ballot title has a clerical error the district attorney or city attorney may correct the error no later than the 10th business day after the ballot title is certified.

Notice


The **local elections official publishes** notice that the ballot title or corrected ballot title has been received in the next available edition of a newspaper of general circulation in the county, city, or district and supplies a copy of the ballot title to chief petitioners. It is advisable for the local elections official to also publish notice on the county, city, or district website for a minimum of seven days. Notice includes all of the following:

- ✓ a statement that the ballot title or corrected ballot title has been received and that any voter may file a petition for review of the ballot title;
- ✓ the deadline for filing the petition and notifying the local elections official;
 -  The deadline to file a petition to review the corrected ballot title is no later than the 10th business day after the ballot title is corrected.
- ✓ the ballot title supplied by the District Attorney or City Attorney or information on how to obtain a copy; and
- ✓ a statement that the prospective initiative petition complies with constitutional requirements.

Ballot Title Appeal

Any registered voter may petition the Circuit Court to review the ballot title issued by the District Attorney or City Attorney. In the petition, the **registered voter must**:

- ✓ name the District Attorney or City Attorney as the respondent; and
- ✓ state the reasons the title is insufficient, not concise, or unfair.

 **A registered voter who files a petition** to review the ballot title must notify the local elections official in writing that a petition for review has been filed. If this notice to the local elections official is not timely filed, the petition to the Circuit Court may be dismissed.



Circuit Court

Any review of the ballot title by the circuit court shall be the first and final review. When appropriate, the court will review the ballot title and certify a title that meets the requirements of ORS 250.035.

Approval to Circulate

The local elections official will not approve cover and signature sheets for circulation until the ballot title is final, the challenge process complete and chief petitioners have filed a Statement of Organization with the State Elections Division. To begin the cover and signature sheet approval process:

Chief Petitioners

- 1 Chief petitioners may add, remove, or change chief petitioners but must ensure that one original chief petitioner remains, if necessary.
 -  To add, remove, or change chief petitioners, an amended [SEL 370](#), completed and signed by all current chief petitioners, must be filed with the local elections official.
- 2 Chief petitioners ensure a campaign account has been set up and a Statement of Organization filed.
 -  See [Campaign Finance Reporting](#) on page 4.

- 3 Chief petitioners or authorized agents use the official cover and signature sheet forms to create signature sheets exactly as intended to circulate.



See [Petition Guidelines and Requirements](#) on page 23.

- 4 Chief petitioners or authorized agents file a copy of the text and an exact example of cover and signature sheets to the local elections official for approval to circulate.



Cover and signature sheets may only be filed for approval by a chief petitioner or authorized agents.



The local elections official does not return any cover and signature sheet filed for approval. Chief petitioners are encouraged to keep an original copy of any cover and signature sheets filed to the local elections official to ensure that, once approved to circulate, an original copy is available to produce correct copies for circulation.

After receiving the text and cover and signature sheets from chief petitioners or authorized agents, the **local elections official**:

- ✓ verifies chief petitioners have set up a petition committee and filed a Statement of Organization by contacting the Elections Division or using ORESTAR available at www.oregonvotes.gov;
- ✓ reviews the text filed for approval, ensuring it reads exactly the same and is formatted substantially similar as the text filed with the prospective petition;
- ✓ reviews cover and signature sheets for compliance with petition requirements; and



See [Petition Guidelines and Requirements](#) on page 23.

If cover and signature sheets do not comply

- ✓ supplies written notification of all required corrections; or

If cover and signature sheets do comply

- ✓ supplies written approval to circulate the petition that includes the number of required signatures and the last day to file signatures for verification.



See [Filing Requirements](#) on page 5.

Gathering Petition Signatures

ORS 250.165, 250.265 and 255.135

Chief Petitioners

- 1 Chief petitioners review with circulators the legal requirements and guidelines for circulating initiative petitions.



See [Petition Guidelines and Requirements](#) on page 23.

- 2 Chief petitioners monitor circulator activities to ensure compliance.


- 3 Chief petitioners may obtain more than the required number of signatures to ensure the petition has enough valid signatures.



Submitting Signatures


ORS 250.215, 250.315, and 255.175


Chief petitioners or authorized agents must mail or personally deliver signature sheets to the local elections official for verification. Only one chief petitioner or authorized agent must be physically present if signatures are personally delivered.

 Signature sheets individually mailed or personally delivered directly to the local elections official by someone other than a chief petitioner or an authorized agent will not be accepted.

Chief Petitioners or Authorized Agents

- 1 Chief petitioners or authorized agents ensure each signature sheet certification is signed and dated by the circulator. This does not apply to e-sheets.
- 2 Chief petitioners or authorized agents number each signature sheet sequentially in the space provided
- 3 Chief petitioners or authorized agents submit signature sheets containing at least 100% of the required number of signatures.
- 4 Chief petitioners affirm the petition is complete and supply the number of signatures filed for verification by filing:

 Form SEL 339 Petition Submission – Initiative, Referendum, Recall, Political Party Formation. All current chief petitioners must sign the same SEL 339.

 A petition filed by mail will only be accepted if a signed copy of the SEL 339 is included in each box.


Verifying Signatures

ORS 250.215, 250.315, 255.175, and OAR 165-014-0110


The **local elections official will only begin the signature verification process** if the petition signature sheets accepted for verification have a number of unverified signatures equal to or greater than the required number of signatures.

The **local elections official processes signature sheets** filed for verification using the Statistical Sampling Procedures for Other than State Initiative or Referendum Petitions adopted under administrative rule. This includes:

- ✓ comparing the filed cover and signature sheets to approved versions;

 The local elections official will reject unapproved petition sheets and those that do not comply with legal requirements.

- ✓ verifying sheets are numbered sequentially


 If the local elections official determines that the petition has more than 50 signature sheets which are not numbered or are not sequentially numbered, chief petitioners will be promptly notified and allowed to correct the sequential numbering. The renumbering of petition sheets will only occur in the place designated by the local elections official and in full view of the local elections official or staff. Should chief petitioners not correct the sequential numbering, the local elections official may invoice chief petitioners for the cost of any staff time necessary to renumber the sheets.

- ✓ determining if the circulator's certification is sufficient;


- ✓ verifying original signatures using voter registration records; and

For city initiative petitions only

- ✓ coordinating with the county elections official for verification of original signatures.

 The county elections official will supply the final number of valid signatures in writing.

If the petition requires more than 4,500 signatures, the statistical sampling process described in OAR 165-014-0110 will be used to determine if the petition has the required number of signatures.


 See OAR 165-014-0110 online at www.oregonvotes.gov.

After signature verification is complete, the **local elections official provides** to chief petitioners:

- ✓ results of signature verification;
- ✓ final number of signatures determined to be valid; and

For petitions not qualified to the ballot

- ✓ information on how to file additional signatures for verification, if the filing deadline has not passed; or

 If the filing deadline has passed and chief petitioners did not submit enough valid signatures, the petition is void.

For petitions qualified to the ballot


- ✓ information on measure number assignment or the next steps in the process.


Certification of County Measure

ORS 250.221 and 254.103

If the initiative has the required number of signatures, the **county elections official** assigns the measure:

- ✓ the next sequential measure number and
- ✓ to the appropriate election.

 The election will be held on the next available May or November election date that is no sooner than 90 days after the petition was filed for signature verification and determined to contain at least 100% of the required number of signatures.

 See the [Election Calendars](#) on page 6 for the dates of regularly scheduled elections and applicable deadlines.





Certification of City Measure


ORS 250.325 and 254.095


If the initiative has the required number of signatures, the **city elections official files the initiated measure with the city governing body** at its next meeting which occurs after the petition has qualified to the ballot.

Review of Initiated Measure by City Governing Body

Not later than 30 days after the initiated measure is filed with it, the **city governing body must review the measure**. It may adopt the initiative, reject it, or take no action, further described below.

City governing body action	Local elections official action
<p>→ The city adopts the initiative.</p> <p> The mayor does not have the authority to veto an initiated measure.</p>	<p>✓ The official takes no action, as the initiative will go into effect without an election being held.</p>
<p>→ The city rejects the initiative unless state law or city charter or ordinance requires a vote on the initiative.</p>	<p>✓ The official submits the measure to city voters at the next available May or November election date that is no sooner than 90 days after the initiated measure was filed with the city governing body.</p> <p>✓ The official files measure with the County Elections Official on:  Form SEL 802 Notice of Measure Election – City.</p>
<p>→ The city rejects the initiative and refers a competing measure that is prepared no later than 30 days after the initiated measure was filed with the governing body.</p> <p> The mayor does not have the authority to veto a competing measure.</p>	<p>✓ The official submits the competing measure to city voters at the same May or November election as the initiated measure.</p> <p>✓ The official files measure with the County Elections Official on:  Form SEL 802 Notice of Measure Election – City.</p>

 The **county elections official reviews** form SEL 802 Notice of Measure Election – City for completeness and assigns the measure the next sequential measure number.

 See the [Election Calendars on page 6](#) for the dates of regularly scheduled elections and applicable deadlines.


Certification of District Measure


ORS 255.085 and 255.185

District Holds Regular District Elections


If the initiative has the required number of signatures, the **district elections authority**:


✓ prepares an order calling for an election; and

 The election will be held no sooner than the next May or November election date for which the filing deadline can be met and no later than the first regular district election following the 40th day after the date of the order.

 See the [Election Calendars on page 6](#) for the dates of regularly scheduled elections and applicable deadlines.

✓ files with the county elections official the order and a completed:


 Form SEL 803 Notice of Measure Election – District.


 The **county elections official reviews** form SEL 803 Notice of Measure Election – District for completeness and assigns the measure the next sequential measure number.

District Does Not Hold Regular District Elections

If the initiative has the required number of signatures the **county elections official** assigns the measure:

- ✓ the next sequential measure number; and
- ✓ to the appropriate election.

 The election will be held on the next available May or November election date for which the filing deadline can be met.

 See the [Election Calendars](#) on page 6 for the dates of regularly scheduled elections and applicable deadlines.

Measure Numbers

- Measure numbers are assigned within each type of measure based on the sequence the petitions were filed with the county for signature verification.
- Measure numbers are preceded by a unique county prefix number.
- Measure numbers will not be repeated.


Withdrawing an Initiative

ORS 250.029

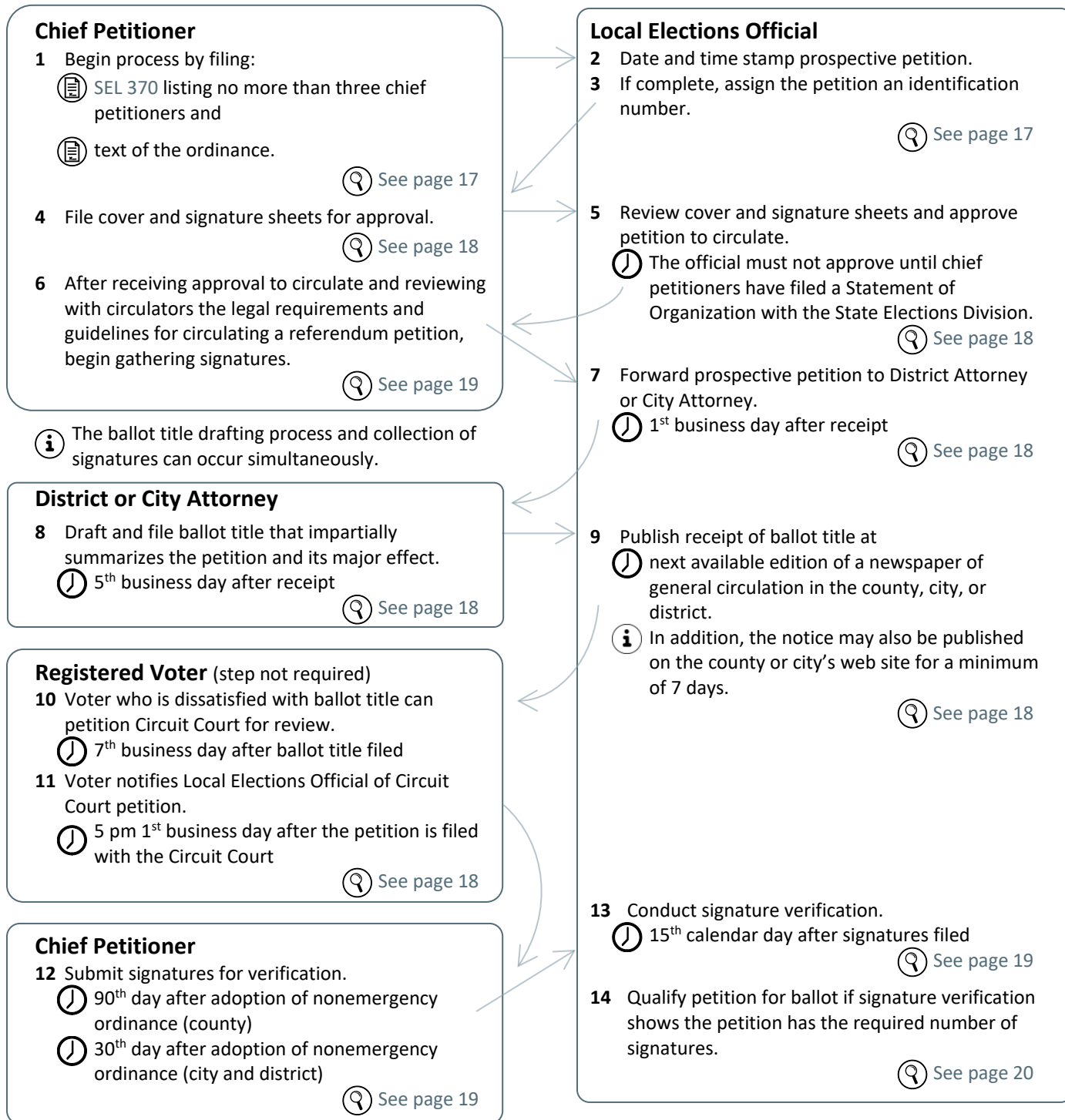
To withdraw an initiative petition, **all current chief petitioners must complete, sign, and file:**

 Form SEL 375 [Withdrawal – Petition](#).

The petition can only be withdrawn if chief petitioners have not filed the total number of signatures required for verification and filed the SEL 339 affirming completeness.

 Once withdrawn, the petition cannot be re-activated. Chief petitioners may re-file the initiative and begin the process again.

Referendum Process Timeline



📄 To calculate deadlines, day one is the day after a complete and correct document is filed or the day after a document is due. If a statutory deadline falls on a Saturday, Sunday, or holiday, the deadline becomes the following business day as provided for in ORS 246.021. However, constitutional deadlines that fall on a Saturday, Sunday, or holiday, becomes the previous business day.

Referendum Process

Except for state statutes relating to ballot title format and the statement of measures filed under ORS 254.095, 254.103, and 255.085, local charter or ordinance requirements may supersede some of the processes discussed in this manual.



Contact the local elections official for any applicable charter and ordinance requirements.



The deadlines for the procedures explained in the following sections are contained in the [Referendum Process Timeline](#) on page 16.

Filing a Prospective Petition

Oregon Constitution, Article IV, §1, Article VI, §10, ORS 250.165, 250.265, and 255.135

Before gathering the signatures necessary to place a referendum on the ballot, chief petitioners must file a prospective petition with the local elections official.

Chief Petitioners

- 1 Chief petitioners designate no more than three people as chief petitioners and determine circulator pay status.
 - Form [SEL 370 Prospective Petition – Local Initiative or Referendum](#) must be completed and signed by all chief petitioners and designate circulator pay status. Incomplete forms will be rejected.
 - If any information provided on form [SEL 370](#) changes, including circulator pay status, all chief petitioners must complete and sign an amended form [SEL 370](#). The form must be filed within 10 calendar days of the change.
- 2 Chief petitioners file text of the nonemergency ordinance or other legislative enactment to be referred and form [SEL 370](#) with local elections official.
 - A referendum petition may be filed on an entire ordinance or just specific sections. Chief petitioners submit as text only those sections of the nonemergency ordinance to be referred. References to the ordinance in this manual include a part of the ordinance, if that is what is referred.
- 3 Chief petitioners set up a campaign account and file a Statement of Organization designating a treasurer with the Elections Division.
 - See [Campaign Finance Reporting](#) on page 4.
- 4 Chief petitioners may also authorize individuals to act on their behalf in most matters about the petition process by completing and filing:
 - Form [SEL 307 Agent Authorization](#).

Local Elections Official

After receiving the prospective referendum petition **the local elections official:**

- ✓ date and time stamps the prospective petition;
- ✓ reviews the forms for required information;
- ✓ if complete and correct, assigns the petition an identification number;
- ✓ scans and emails a date stamped copy of the [SEL 370](#) to the Elections Division at orestar-support.sos@sos.oregon.gov; and
- ✓ forwards a copy of the text to the district attorney or city attorney for preparation of the ballot title.

Approval to Circulate

Because of the shortened time period to gather signatures on a referendum petition, chief petitioners are not required to wait for the final ballot title to begin the cover and signature sheet approval process. Often the ballot title drafting process and collection of signatures occurs simultaneously. The local elections official will not approve cover and signature sheets for circulation until the chief petitioners have filed a Statement of Organization with the State Elections Division. To begin the cover and signature sheet approval process:

Chief Petitioners

- 1 Chief petitioners add, remove, or change chief petitioners ensuring that one original chief petitioner remains, if applicable.



To add, remove or change chief petitioners an amended form [SEL 370](#) completed and signed by all current chief petitioners must be filed with the local elections official.

- 2 Chief petitioners ensure a campaign account has been set up and a Statement of Organization filed.



See [Campaign Finance Reporting](#) on page 4.

- 3 Chief petitioners or authorized agents use the official cover and signature sheet forms to create signature sheets exactly as intended to circulate.



See [Petition Guidelines and Requirements](#) on page 23.

- 4 Chief petitioners or authorized agents file a copy of the text, and an exact example of cover and signature sheets, to the local elections official for approval to circulate.



Cover and signature sheets may only be filed for approval by a chief petitioner or authorized agent.



The local elections official does not return any cover and signature sheet filed for approval. Chief petitioners are encouraged to keep an original copy of any cover and signature sheet filed to the local elections official to ensure that once approved to circulate an original copy is available to produce correct copies for circulation.

After receiving the text and cover and signature sheets from chief petitioners or authorized agents, the **local elections official**:

- ✓ verifies chief petitioners have set up a petition committee and filed a Statement of Organization by contacting the Elections Division or using ORESTAR available at www.oregonvotes.gov;
- ✓ reviews the text filed for approval ensuring it reads exactly the same and is formatted substantially similar as the text filed with the prospective petition;
- ✓ reviews cover and signature sheets for compliance with petition requirements; and



See [Petition Guidelines and Requirements](#) on page 23.

If cover and signature sheets do not comply

- ✓ supplies written notification of all required corrections; or

If cover and signature sheets do comply

- ✓ supplies written approval to circulate the petition that includes the number of required signatures and the last day to file signatures for verification.



See [Filing Requirements](#) on page 5.



Ballot Title


ORS 250.035, 250.175, 250.195, 250.275, 250.296, 255.145, 255.155, and 255.215

A ballot title is a concise and impartial statement summarizing the referendum and its major effect that is printed on the ballot.

Format


After receiving the text of the prospective petition, **the district attorney or city attorney drafts and files a ballot title** with the local elections official. A ballot title includes:

- a caption that does not exceed 10 words identifying the subject of the petition;
- a question that does not exceed 20 words plainly phrasing the main purpose of the petition so that an affirmative response to the question corresponds to a yes vote on the ballot; and
- a summary that does not exceed 175 words concisely and impartially summarizing the petition and describing its major effect.

 If the ballot title has a clerical error, the district attorney or city attorney may correct the error no later than the 10th business day after the ballot title is certified.

Notice


The **local elections official publishes** notice in the next available edition of a newspaper of general circulation in the county, city, or district that the ballot title or corrected ballot title has been received and supplies a copy of the ballot title to chief petitioners. It is advisable for notice to also be published on the county, city, or district website for a minimum of seven days. Notice includes all of the following:

- ✓ a statement the ballot title or corrected ballot title has been received and that any voter may file a petition for review of the ballot title;
- ✓ the deadline for filing the petition and notifying the local elections official; and
-  The deadline to file a petition to review the ballot title is no later than the 7th business day after the ballot title is filed with the elections officer.
- ✓ the ballot title supplied by the District Attorney or City Attorney or information on how to obtain a copy.

Ballot Title Appeal

Any registered voter may petition the Circuit Court to review the ballot title issued by the District Attorney or City Attorney. In the petition, the **registered voter must**:

- ✓ name the District Attorney or City Attorney as the respondent; and
- ✓ state the reasons the title is insufficient, not concise or unfair.

 **A registered voter who files a petition** to review the ballot title is required to notify the local elections official in writing that a petition for review has been filed. If this notice to the local elections official is not timely filed, the petition to the Circuit Court may be dismissed.


Circuit Court

Any review of the ballot title by the circuit court shall be the first and final review. When appropriate the court will review the ballot title and certify a title that meets the requirements of ORS 250.035.

Gathering Petition Signatures

ORS 250.165, 250.265, and 255.135


Chief Petitioners

- 1 Chief petitioners review with circulators the legal requirements and guidelines for circulating referendum petitions.
 See [Petition Guidelines and Requirements](#) on page 23.
- 2 Chief petitioners monitor circulator activities to ensure compliance.
- 3 Chief petitioners may obtain more than the required number of signatures to ensure the petition has enough valid signatures.

Submitting Signatures


ORS 250.215, 250.315, and 255.175


Chief petitioners or authorized agents must mail or personally deliver signature sheets to the local elections official for verification. Only one chief petitioner or authorized agent must be physically present if signatures are personally delivered.

 Signature sheets individually mailed or delivered directly to the local elections official by someone other than a chief petitioner or an authorized agent will not be accepted.

Chief Petitioners or Authorized Agents

- 1 Chief petitioners or authorized agents ensure each signature sheet certification is signed and dated by the circulator. This does not apply to e-sheets.
- 2 Chief petitioners or authorized agents number each signature sheet sequentially in the space provided
- 3 Chief petitioners or authorized agents file signature sheets containing at least 100% of the required number of signatures.
- 4 Chief petitioners affirm the petition is complete and provide the number of signatures filed for verification by filing:

 [Form SEL 339 Petition Submission – Initiative, Referendum, Recall, Political Party Formation](#) that has been marked completed. All current chief petitioners must sign the same SEL 339.

 A petition filed by mail will only be accepted if a signed copy of the [SEL 339](#) is included in each package.

Verifying Signatures

ORS 250.215, 250.315, 255.175, and OAR 165-014-0110

The **local elections official will only begin the signature verification process** if the petition signature sheets accepted for verification have a number of unverified signatures equal to or greater than the required number of signatures.

The **local elections official processes signature sheets** filed for verification in accordance with the Statistical Sampling Procedures for Other than State Initiative and Referendum Petitions adopted under administrative rule. This includes:

- ✓ comparing the filed cover and signature sheets to the official templates;



The local elections official will reject unapproved petition sheets and those that do not comply with legal requirements.

- ✓ verifying sheets are numbered sequentially;



If the local elections official determines that the petition has more than 50 signature sheets which are not numbered or are not sequentially numbered, chief petitioners will be promptly notified and allowed to correct the sequential numbering. The renumbering of petition sheets will only occur in the place designated by the local elections official and in full view of the local elections official or staff. Should chief petitioners not correct the sequential numbering, the local elections official may invoice chief petitioners for the cost of any staff time necessary to renumber the sheets.

- ✓ determining if the circulator's certification is sufficient;
- ✓ verifying original signatures using voter registration records; and

For city referendum petitions only

- ✓ coordinating with the county elections official for the verification of original signatures.



The county elections official will supply the final number of valid signatures in writing.

If the petition requires more than 4,500 signatures, the statistical sampling process described in OAR 165-014-0110 will be used to determine if the petition has the required number of signatures.



See OAR 165-014-0110 online at www.oregonvotes.gov.

After signature verification has been completed the **local elections official provides** to chief petitioners:

- ✓ results of signature verification;
- ✓ final number of signatures determined to be valid; and

For petitions not qualified to the ballot

- ✓ information on how to file additional signatures for verification if the filing deadline has not passed; or



If the filing deadline has passed and chief petitioners failed to submit enough valid signatures, the petition is void.

For petitions qualified to the ballot

- ✓ information on measure number assignment or the next steps in the process.

Certification of County Measure

ORS 250.221 and 254.103

If the referendum has the required number of signatures the **county elections official** assigns the measure:

- ✓ the next sequential measure number; and
- ✓ to the appropriate election.



The election will be held on the next available May or November election date that is no sooner than 90 days after the petition was filed for signature verification and determined to contain at least 100% of the required number of signatures.



See the [Election Calendars](#) on page 6 for the dates of regularly scheduled elections and applicable deadlines.



Certification of City Measure

ORS 250.325 and 254.095

If the referendum has the required number of signatures the **city elections official**:

- ✓ notifies the County Elections Official if an election is required to be held and files:



Form SEL 802 Notice of Measure Election – City.



The **county elections official reviews** form SEL 802 Notice of Measure Election – City for completeness and assigns the measure the next sequential measure number.



The election will be held on the next available May or November election date that is no sooner than 90 days after the measure was filed for signature verification and for which enough signatures have been verified.



See the [Election Calendars on page 6](#) for the dates of regularly scheduled elections and applicable deadlines.

Certification of District Measure

ORS 255.085 and 255.185

District Holds Regular District Elections

If the referendum has the required number of signatures the **district elections authority**:

- ✓ prepares an order calling for an election and



The election will be held no sooner than the next May or November election date for which the filing deadline can be met and no later than the first regular district election following the 40th day after the date of the order.



See the [Election Calendars on page 6](#) for the dates of regularly scheduled elections and applicable deadlines.

- ✓ files with the county elections official the order and a completed:



Form SEL 803 Notice of Measure Election – District.



The **county elections official reviews** form SEL 803 Notice of Measure Election – District for completeness and assigns the measure the next sequential measure number.

District Does Not Hold Regular District Elections

If the referendum has the required number of signatures the **county elections official** assigns the measure:

- ✓ the next sequential measure number and
- ✓ to the appropriate election.



The election will be held on the next available May or November election date for which the filing deadline can be met.



See the [Election Calendars on page 6](#) for the dates of regularly scheduled elections and applicable deadlines.



Measure Numbers

- Measure numbers are assigned within each type of measure based on the sequence the petitions were filed with the county for signature verification.
- Measure numbers are preceded by a unique county prefix number.
- Measure numbers will not be repeated.


Withdrawing a Referendum

ORS 250.029

To withdraw a referendum petition, **chief petitioners must complete, sign, and file:**


-  Form SEL 375 Withdrawal – Petition

The petition can only be withdrawn if chief petitioners have not filed the total number of signatures required for verification and filed the SEL 339 affirming completeness.

-  Once withdrawn the petition cannot be re-activated. If the filing deadline has not passed chief petitioners may re-file the referendum and begin the process again.

Petition Guidelines and Requirements





The guidelines and requirements for producing and circulating initiative and referendum cover and signature sheets are explained in the following sections.

-  For assistance on completing official cover and signature sheet forms contact the Elections Division at irrlistnotifier.sos@sos.oregon.gov or 503 986 1518.

Cover and Signature Sheets

ORS 250.165, 250.265, and 255.135

The submission of any form for approval to circulate is optional. **Chief petitioners must use official cover and signature sheet forms** to collect signatures. Official cover and signature sheet forms include:



-  Form SEL 348 E-Sheet – Local Petition;
-  The e-sheet does not require a circulator personally witness a voter signing which allows a voter to sign a petition from the privacy of their home at a time of their choosing.
-  Form SEL 369 Local Petition Cover Sheet; and
-  Form SEL 371 Signature Sheet – Local Petition.


Senate Bill 27 (2021)

Senate Bill 27 (2021) requires chief petitioners to list their residential city and state on cover sheets and e-sheets instead of their complete address. Petition sheets approved prior to the passage of SB 27 may continue to be circulated until the deadline to submit signatures has passed or approval to circulate the petition sheet is revoked. If submitted for verification, approved petition sheets which list the complete residential address of chief petitioners will not be rejected for that reason.

Completion


Chief petitioners must complete the following information for each form filed for approval to circulate:

E-Sheet	Cover Sheet	Signature Sheet
<ul style="list-style-type: none"> ✓ petition identification number ✓ petition type ✓ circulator pay status, for the entirety of the petition not for an individual sheet <p>For an Initiative</p> <ul style="list-style-type: none"> ✓ final ballot title, including caption, question, and summary <p>For a Referendum</p> <ul style="list-style-type: none"> ✓ title of the measure as enacted by the local governing body or, if there is no title, the title supplied by chief petitioners  If chief petitioners supply the title, the number of ordinance or resolution being referred and the date adopted by the local governing body must be included. ✓ names and residential city and state of chief petitioners 	<ul style="list-style-type: none"> ✓ petition type ✓ jurisdiction type ✓ name of the county, city, or district where the petition is being proposed <p>For an Initiative</p> <ul style="list-style-type: none"> ✓ final ballot title, including caption, question, and summary <p>For a Referendum</p> <ul style="list-style-type: none"> ✓ title of the measure as enacted by the local governing body or, if there is no title, the title supplied by chief petitioners  If chief petitioners supply the title, the number of ordinance or resolution being referred and the date adopted by the local governing body must be included. ✓ text of the initiative or referendum if space allows ✓ names and residential city and state of chief petitioners 	<ul style="list-style-type: none"> ✓ petition identification number ✓ petition type ✓ circulator pay status, for the entirety of the petition not for an individual sheet ✓ name of the county, city, or district where the petition is being proposed <p>For an Initiative</p> <ul style="list-style-type: none"> ✓ caption of the final ballot title <p>For a Referendum</p> <ul style="list-style-type: none"> ✓ number of the ordinance or resolution being referred and date adopted by the local governing body

 Chief petitioners or authorized agents complete the petition sheet number prior to submitting the petition for verification.

Production


Chief petitioners must produce the text, e-sheet, cover sheet, and signature sheet in the following manner:

Text	E-Sheet	Cover and Signature Sheet
<ul style="list-style-type: none"> ✓ printed in at least 10-point type 	<ul style="list-style-type: none"> ✓ printed on at least 20-pound , uncoated white paper or equivalent ✓ when filed for verification be on standard 8½" x 11" size paper or equivalent  The size, weight and color paper requirements outlined above do not apply to any e-sheet, if from the face of the e-sheet the local elections official can determine that the signer printed the e-sheet and had the opportunity prior to signing to review the required information. 	<ul style="list-style-type: none"> ✓ cover and signature sheets are copied or printed back-to-back on a single sheet of paper ✓ when filed for verification be on standard 8½" x 11" size paper or equivalent ✓ printed on at least 20-pound , uncoated paper or equivalent

Distribution

To facilitate circulation of approved forms chief petitioners may but are not limited to:



Distribution Method	E-Sheet Requirements	Cover and Signature Sheet Requirements
✓ Petitioners may use paid or volunteer circulators to solicit signatures.	→ Circulators may not use e-sheets to gather signatures.	→ Each circulator must have a complete copy of the text available for signers to review unless printed on the cover sheet.
✓ Petitioners may mail to a subscription list or other interested parties.	→ A voter needs to request a printed copy to be mailed. A complete copy of the text must be mailed with each e-sheet.	→ A complete copy of the text must be mailed with each cover and signature sheet.
✓ Petitioners may publish on a website.	→ A complete copy of the text and instructions for signers to print e-sheet on at least 20 pound, 8½" x 11" uncoated white paper, or equivalent, must be published with the e-sheet.	→ A complete copy of the text and instructions for signers to print the cover and signature sheet back-back on at least 20-pound, 8½" x 11" uncoated white paper, or equivalent, must be published with the cover and signature sheet.
✓ Petitioners may email to a subscription list or other interested parties for voter to print individually at home.	→ A complete copy of the text and instructions for signers to print e-sheet on at least 20 pound, 8½" x 11" uncoated white paper, or equivalent, must be included in the email.	→ A complete copy of the text and instructions for signers to print the cover and signature sheet back-to-back on at least 20-pound, 8½" x 11" uncoated white paper, or equivalent, must be included in the email.
✓ Petitioners may insert into a publication for distribution.	→ Not applicable to e-sheet.	→ A complete copy of the text must be inserted with the cover and signature sheet.

 To determine if petition sheets may be distributed by a method not listed, contact the local elections official.

Cover and Signature Sheet Modifications

Multiple versions of cover and signature sheets may be approved for circulation simultaneously. Any proposed variation to the approved signature sheets must be resubmitted and approved in writing by the elections official before circulating. Signatures collected on unapproved signature sheets will be rejected.

Signature sheets are void if the:

- petition is withdrawn;
 - signature submission deadline has passed; or
 - residential city and state of a chief petitioner changes or circulator pay status changes.
-  Chief petitioners must submit updated cover and signature sheets for approval to continue circulating.
 -  Once new cover and signature sheets are approved to circulate, chief petitioners will have 30 days to remove the previous version from circulation.





Guidelines for Circulation

ORS 250.045, 260.555, and 260.558

A circulator is an individual who asks voters to sign a petition and signs the petition as a circulator. They are also called petition circulator, signature gatherer, and signature collector. While some are volunteers and others paid professionals, every circulator must follow the requirements and guidelines for circulating petitions.

To ensure compliance with legal requirements and guidelines chief petitioners must educate circulators and monitor their activities.

Circulator Requirements

Each circulator must:	What this means:
→ Personally witness each signature collected.	<ul style="list-style-type: none"> ✓ Watch the person sign the petition.  It is not sufficient to merely be present in the same room or vicinity.
→ Complete the circulator certification after witnessing all signatures collected on a sheet.	<ul style="list-style-type: none"> ✓ Sign the certification using a legal signature.  A legal signature is defined as a signature having obvious and predominantly matching characteristics to signatures on file from a paid circulator’s registration, signatures in the Oregon voter registration file, or the signature on an official government document.  Initials, signature stamps, illegible or printed script are not sufficient unless verified by exemplar.
→ Supply the date when the certification was signed.	<ul style="list-style-type: none"> ✓ The date must be in month, day, year order if written in all numbers.
→ Allow any person to read the text of an initiative or referendum petition.	<ul style="list-style-type: none"> ✓ A complete copy of text must be available for signers of an initiative or referendum if not printed on cover sheet.
→ If being paid to gather signatures, review the Secretary of State’s Circulator Training Manual.	<ul style="list-style-type: none"> ✓ Must be completed before being paid to gather any signatures.  See the Circulator Training Manual available at www.oregonvotes.gov.



A circulator’s failure to follow these requirements may result in the rejection of the petition signature sheets and a felony conviction for the circulator.

Circulator Prohibitions

It is against the law for circulators to knowingly:

- circulate a petition containing a false signature;

- attempt to obtain the signature of a person who is not qualified to sign the petition;
(i) Only active registered voters may sign a petition.

- make false statements to any person who signs the petition or requests information about it;

- offer money or anything of value to another person to sign or not sign the petition;

- sell or offer to sell signature sheets; and

- write, alter, correct, clarify, or obscure any information about the signers unless the signer initials after the changes are made.
(i) A circulator may help a disabled signer who requests help in completing their printed name, address and date signed. In such a case, no initials are required.

Violations of the circulator requirements may result in conviction of a felony with a fine of up to \$125,000 and/or a prison sentence of up to 5 years. ORS 260.715, 260.993

Signer Requirements

Each petition signer must:	What this means:
→ Supply an original signature and should be encouraged to also supply their printed name, date signed and address;	✓ Petition signers must sign the petition using a signature contained in their voter registration record.
→ Be an active registered voter at the time of signing the petition in the electoral district where the petition is being circulated; and	✓ Information in the voter registration record must be up to date so they would be able to vote on the petition.
→ Personally print a copy of an e-sheet or a separate person print a copy.	✓ Petition signers may not sign an e-sheet unless they printed it themselves or requested someone else print it for them.

Signature Date

If no date is supplied by the signer, the signature is only considered valid if the signer:

- ✓ was an active registered voter between the petition’s approval to circulate and the circulator’s certification date; or

- ✓ originally registered to vote on or after the date the petition’s approval to circulate date and was an active registered voter between their original registration date and the circulator’s certification date.

- (i) This standard also applies to any signer that supplies an ambiguous date such as date of birth or a date that has not yet occurred at the time of verification, instead of the date they signed the petition.

Signer Prohibitions

It is against the law for signers to knowingly:

- sign another person’s name under any circumstances;
- sign a petition more than one time; or
- sign a petition when not qualified to sign it.



Only active registered voters may sign a petition. If the signer is not registered to vote or an active voter, then the signature will be rejected unless a completed registration card is received by a designated voter registration agency or elections filing officer before 5 pm the day the petition is signed or 11:59:00 pm if completed electronically online at www.oregonvotes.gov.

Certification of Signature Sheets

OAR 165-014-0270

After all signatures on a signature sheet have been collected, circulators complete the certification by signing their legal signature and by supplying the date when the certification was signed. A legal signature is defined as a signature having obvious and predominantly matching characteristics to signatures in the Oregon voter registration file, or the signature on an official government document.



If additional signatures are gathered after the circulator certification has been signed and dated, the circulator must re-sign and re-date the certification.

If the circulator certification is not completed or it is determined to be insufficient the signature sheet will be rejected. Prior to submission to the local elections official the circulator may correct the following defects:

Circulator Signature Defects

If the circulator has:	Then the circulator should:
→ signed using only initials; Unless verified by exemplar.	✓ re-sign and re-date certification with legal signature;
→ signed using a signature stamp; Unless a signature stamp has been approved under ORS 246.025.	✓ re-sign and re-date certification with legal signature;
→ signed using an illegible signature; Unless verified by exemplar.	✓ re-sign and re-date certification with legal signature;
→ photocopied or carbon copied the certification; or	✓ re-sign and re-date certification with legal signature; or
→ signed in a manner that the signature, printed name, and address are all illegible.	✓ re-sign and re-date certification with legal signature.

Certification Date Defects

If the date is:	Then the circulator should:
→ missing;	✓ re-sign and date or date and initial correction;
→ crossed out;	✓ re-sign and re-date or re-date and initial correction;
→ overwritten with a different date;	✓ re-sign and re-date or re-date and initial correction;
→ earlier than all petition signers; <i>i</i> Does not apply if the circulator and the only signer are the same person.	✓ re-sign and re-date or re-date and initial correction;
→ earlier than some, but not all petition signers; <i>i</i> Only those signatures dated on or before the date of the certification will be accepted.	✓ re-sign and re-date or re-date and initial correction;
→ partial or ambiguous; or	✓ re-sign and re-date or re-date and initial correction; <i>i</i> Date must be in month, day, year order if written in all numeric characters.
→ obscured in any way by white out or other correction fluid or adhesive tape;	✓ re-sign and re-date or re-date and initial correction.

The following defects in the circulator certification cannot be corrected and any signature sheet filed that has one of these defects will be rejected:

Incurable Defects

- the original signature of a circulator has been crossed out, and a different circulator’s signature is inserted;
 Does not apply if the original signature is that of an individual whose signature appears on the same signature sheet as a signer.

- two individuals sign and date as circulator; or
 Does not apply if the only signers and the circulators are the same people

- whiteout or other correction fluid or adhesive tape appears on the signature line

ex Illustrated examples of circulator signature and date defects are available in the [Circulator Training Manual](#) available at www.oregonvotes.gov.



List of Forms

SEL 307

Agent Authorization

SEL 339

Petition Submission

SEL 348

Electronic Signature Sheet – Local Petition

SEL 369

Local Petition Cover Sheet

SEL 370

Prospective Petition – Local Initiative or Referendum

SEL 371

Signature Sheet – Local Petition

SEL 375

Withdrawal – Petition