

PRE-CIRCULATION PHASE 1

- ❑ **RESEARCH LEGALITY:** What are the regulations and court cases that affect the signature collection process?
- ❑ **RESEARCH PROCEDURES:** Request information from the Secretary of State and the Attorney General. Get copies of all applicable laws and handouts.
- ❑ **INTERVIEW FORMER PROPONENTS:** Talk to as many as possible. Get copies of initiatives, press packets, instructions, brochures, fact sheets, plans, budgets...
- ❑ **FORM COALITION:** Outreach to like-minded groups and individuals. This is a big task. You need all the help you can find.
- ❑ **POLL ELECTORATE:** What do the voters know about your issue? How do they feel about it? General rule-of-thumb: An initial 2/3 support gives you a chance to win at the ballot box.
- ❑ **IDENTIFY AND EVALUATE OPPOSITION:** How strong are they? How much money can they raise? How determined are they? What are their resources?
- ❑ **WRITE THE INITIATIVE:** Legal help is essential. Make wording accomplish the goal without providing a target for the opposition. Focus groups and polling are a must. The “worst” wording is decided by the “least” input.
- ❑ **PLAN SIGNATURE CAMPAIGN:** How are you going to get the 130 percent of the numbers of signatures required?
- ❑ **DEVELOP BUDGET:** Consider staff, office equipment, professional services, signature costs, utilities, advertising, printing, phones, and shipping. Political campaigns cost money. You must raise substantial sums to win. A well prepared budget helps.

When you have checked every item, you are ready to file. If an item is unchecked prior to filing, it is a red flag. Red-flagged items must be dealt with during Phase II. This indicates that ballot access is in jeopardy. You may not qualify this time. There is always the next cycle. Howard Jarvis tried four times before successfully qualifying the famous California Proposition 13.

CIRCULATION PHASE 2

- ❑ **DEVELOP DISTRIBUTION PLAN:** Determine the number of petitions needed to collect the total signature goal. Print enough petitions for distribution to organizations, individual volunteers, direct mail, retail outlets, etc...
- ❑ **DEVELOP ORGANIZATIONAL PLAN:** Identify duties and assign key tasks. Write out responsibilities and job descriptions for key personnel.
- ❑ **DEVELOP FUNDRAISING PLAN:** Include potential large donors, internet fundraising, direct mail efforts and special fundraising events.
- ❑ **DEVELOP AWARENESS PROGRAM:** How can you inform the maximum number of potential signers, contributors, and volunteers of your initiative? Make a plan using the internet, media, speakers, editorials, letters-to-the-editor, and bumper stickers.
- ❑ **DEVELOP VOLUNTEER PLAN:** How will you recruit, train, motivate, supervise, schedule, and reward your volunteers?
- ❑ **DEVELOP RETRIEVAL PLAN:** How are signatures retrieved from the field in a timely manner for processing, validating, and submitting?
- ❑ **DEVELOP SUBMISSION PLAN:** Find a SAFE place to store the signatures. Check the rules and regulations for submission and be sure to comply with the regulated format.

Qualifying an issue for the ballot is not easy. We hope you find this list helpful, but nothing can replace dedication and enthusiasm. At National Voter Outreach, we are dedicated to increasing citizen participation through the process of direct democracy. If you have a question, feel free to call us. We never charge for a phone consultation.

