


State Voters' Pamphlet Manual

Published by

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Secretary of State
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Using This Manual

This manual explains the procedures and requirements to individuals interested in filing statements or arguments for inclusion in the state voters' pamphlet.

This manual is organized into 4 sections:

- guidelines and requirements, which provides information relevant to all voters' pamphlet statements and arguments;
- types of filings, which lists those persons, organizations or committees that can submit information for inclusion in the state voters' pamphlet;
- filing, which provides instruction on the requirements for submitting a statement or argument;
- and**
- compliance, which details the process the Elections Division uses to correct non-compliant statements and arguments.

Icons

The following icons are used in this manual to emphasize information:



alert icon

indicates alert; warning; attention needed



info icon

indicates additional information



deadline icon

indicates a deadline



petition sheet icon

indicates a reference to a signature sheet



example icon

indicates a detailed example of a concept, process or form



search icon

indicates information located elsewhere




form icon

indicates a reference to a form


Assistance

If you have any questions about the material covered in this manual or need further assistance, please contact:

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255 Capitol St. NE, Suite 501
Salem, OR 97310

 **503 986 1518**
fax 503 373 7414

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

 **1 866 673 8683**
se habla español

tty 1 800 735 2900
for the hearing impaired

Filing Requirements for State Voters' Pamphlet

All signatures must be of active registered voters within the district (ORS 251.095)

	Primary Election	General Election		
First Day to File Prospective Petition	September 7, 2017	May 30, 2018		
First Day to File by Fee or Completed Petition	January 15, 2018	July 9, 2018		
Last Day to File by Fee or Completed Petition	March 8, 2018	August 28, 2018		
Last Day to Withdraw	March 8, 2018	August 28, 2018		
Last Day to Submit Signatures for Guaranteed Verification	February 22, 2018	August 14, 2018		
If at least 100% of the required signatures are submitted not later than the 10th business day before the filing deadline, the elections official will verify signatures so that they may be submitted in lieu of payment. Signatures submitted after this date may not be verified by the filing deadline and the statement or argument filer would be required to pay the appropriate filing fee in order to appear in the voters' pamphlet.				
Statements Become Public	March 14, 2018	September 3, 2018		
Voters' pamphlet records are exempt from public disclosure until the 4th business day after the filing deadline.				
Candidate Statement	Fee	Word Count	Required Signatures	Verification of Signatures
President or Vice President	\$3500	325	500	Elections Division
US Senator or Statewide Office	\$3000	325	500	Elections Division
US Representative	\$2500	325	300	Elections Division
State Senator or Representative	\$750	325	200	Elections Division
Circuit Court Judge, District Attorney, or County Judge	\$600	325	200	Elections Division
County Office	\$600	325	200	Appropriate County Elections Official
City Office	\$600	325	200	Appropriate County Elections Official
Metropolitan Service District Office	\$600	325	200	Appropriate County Elections Official
Each statement listed above, including any portrait, must fit within one column of voters' pamphlet space.				
Measure Argument	Fee	Word Count	Required Signatures	Verification of Signatures
State Measure	\$1200	325	500	Elections Division
County Measure	Set by county ordinance.	325	Set by county ordinance	Appropriate County Elections Official
May only appear in the state voters' pamphlet in specific circumstances.				
See page 20 for complete explanation.				
Community College District Measure Relating to Bonding	Set by county ordinance.	325	Set by county ordinance	Appropriate County Elections Official
May only appear in the state voters' pamphlet in specific circumstances.				
See page 20 for complete explanation.				
The length of an argument may not exceed the equivalent of one column of voters' pamphlet space, even if it spans columns or pages.				
Other Statements	Fee	Word Count	Required Signatures	Verification of Signatures
Statewide Political Party	\$1200	650	500	Elections Division
Less than Statewide Political Party	\$600	325	300	Elections Division
Statewide Assembly of Electors	\$1200	650	500	Elections Division
Less than Statewide Assembly of Electors	\$600	325	300	Elections Division
Citizen Initiative Review Statement	Actual cost	250	N/A	N/A
The length of any Statement by Statewide Political Party, Statewide Assembly of Electors or Citizen Initiative Review Statement may not exceed one page of voters' pamphlet space. Statements by any less than Statewide Political Party or Assembly of Electors may not exceed the equivalent of one column of voters' pamphlet space, even if it spans columns or pages.				

Guidelines and Requirements

The Oregon voters' pamphlet is a publication produced and distributed by the Elections Division. A voters' pamphlet is produced for each Primary and General Election, as well as for any special statewide election.

It has been compiled by the Secretary of State since 1903, when Oregon became one of the first states to provide for the printing and distribution of such a publication. One copy of the voters' pamphlet is mailed to every household in the state.

Included in the voters' pamphlet is information about candidates, measures, recognized political parties and any assembly of electors. It also includes instructions for marking the ballot, a complete list of federal and state candidates, and other information on the voting process.

Procedures for filing a voters' pamphlet statement or argument are explained in the following sections. It is very important to review the procedures thoroughly and follow the instructions completely.

ORESTAR

Oregon election law requires all statements and arguments submitted for inclusion in the state voters' pamphlet to be filed electronically.




The Secretary of State has enhanced ORESTAR, a secure web-based electronic reporting system developed for committees to file campaign finance transactions, for voters' pamphlet filings.

To submit voters' pamphlet statements and arguments all filers must register in ORESTAR by creating a user account. For further detail on registering in ORESTAR and submitting a voters' pamphlet filing using ORESTAR:



See the [ORESTAR User's Manual: Voters' Pamphlet Filing](#) available at www.oregonvotes.gov.

In the event the Secretary of State issues a written determination that ORESTAR is unavailable for use by filers submitting measure arguments who cannot pay filing fees using VISA or MASTERCARD, the following steps are designated as an alternative electronic filing system for their use. Filers must:

- 1 Draft the statement or measure argument in Microsoft Word.
- 2 Complete form SEL 405 State Voters' Pamphlet, Measure Argument.
 -  Form will be distributed by the Elections Division.
- 3 Electronically submit the measure argument in Microsoft Word document format and the completed SEL 405 by email to orestar-support.sos@oregon.gov.



Any statement submitted to an email address other than orestar-support.sos@oregon.gov will not be accepted.

- 4 Pay the required filing fee by providing a check, cash, or any legal instrument redeemable as currency to the Elections Division.



The filing is not considered complete and will not be accepted unless payment is received by 5 pm:

Primary Election	March 8, 2018
General Election	August 28, 2018

- 5 Amendments to arguments submitted under the alternative filing system must be submitted by email to orestar-support.sos@oregon.gov.



Filers are prohibited from filing the same measure argument in ORESTAR.

Designated Filer for Specified Committees

The following committees and groups must provide written notification to the Elections Division of the ORESTAR account user name, first and last name, and contact information for the person designated to file the statements or arguments electronically:

- Legislative Committee responsible for drafting argument in support of legislative referral;
- Explanatory Statement Committee;
- Legislative Counsel Committee;
- Financial Estimate Committee;
- Political parties;
- Assembly of electors;
- Citizens Initiative Review Commission; and
- Oregon Criminal Justice Commission.



Generally, notification must be delivered to the Elections Division no later than 10 business days prior to any filing deadline. See the individual processes outlined in this manual on [pages 11-20](#) for more detail.

Statements of Endorsement

ORS 251.049

If a filer uses the name of a person or organization in a statement or argument as supporting or endorsing the candidate or measure, the filer must either submit a completed and signed [SEL 400, Statement of Endorsement](#) form for each person or organization identified or include a publicly disseminated quote identified by source and date.



Form SEL 400 Statement of Endorsement

A Statement of Endorsement must be completed and signed by the person, or by an authorized person on behalf of an organization, consenting to the use of their name or the name of the organization they represent. An organization's name should be used only if the organization is endorsing the argument or statement. A spokesperson for an organization may not list individual names of members of the organization without an accompanying [SEL 400](#) for each of those individuals. The form requires the following for completion:

- 1** the applicable election date;
 - A Statement of Endorsement is only valid for the election it is submitted for.
- 2** the statement or argument filing type;
- 3** the name of the candidate, political party, assembly of electors, or person who furnished the argument; and
 - A Statement of Endorsement is only valid for the statement or argument it is submitted for.
- 4** Endorsement information; select **Option 1** or **Option 2**.
 - **Option 1** allows the statement or argument filer to determine how a person's name, applicable title, name of the organization the person is authorized to represent, if any, and other biographical information will appear in the statement or argument.
 - **Option 2** requires the statement or argument filer to reproduce the person's name, applicable title, name of the organization the person is authorized to represent, if any, exactly as it appears on the completed and signed [SEL 400](#).



A quote made by the person or by an authorized person on behalf of an organization is not required to be included on or attached to the completed and signed form.



Forms are available online at www.oregonvotes.gov.

Preferred Filing Format

The Elections Division requests Statements of Endorsements be filed in the following manner:

- 1 compile all Statement of Endorsement forms into a single PDF document;
- 2 name the scanned document with the statement or arguments filer's last name; and
- 3 upload electronically using ORESTAR.



See the [ORESTAR User's Manual: Voters' Pamphlet Filing](#) available at www.oregonvotes.gov.



Endorsements may also be delivered, mailed, or faxed to the Elections Division.

Publicly Disseminated Quote

The name of the person or organization with a quotation made by the person or by an authorized person on behalf of an organization may be included if the quote:

- ✓ has been disseminated to the public prior to its inclusion in the statement or argument and
 - Publicly disseminated includes, but is not limited to, being published on a website.
- ✓ is identified by its source and date in the statement or argument.

Formatting of Voters' Pamphlet Material

A statement or argument may only include:

- words and numbers (charts and graphics may not be used);
- numbered or bulleted lists;
- italic, bold or underlined text;
- block quotes;
- centered, left justified, or right justified text; and
- a table to ensure two-column formatting.




Filers are encouraged to use the text editor in ORESTAR to draft and format a statement or argument that complies with the requirements listed above. Statements or arguments drafted in other applications and copied and pasted into the ORESTAR text editor may be edited by the Elections Division to comply with text and format requirements.

Standard formatting is applied to all voters' pamphlet statements and arguments:

- Indented, numbered, and bulleted lists with hanging bullet or number;
- font size;
- smart quotation marks;
- vertical spacing between paragraphs;
- single spacing after punctuation and between words;
- plain text for candidate statement required information;



- urls and email addresses will be converted to hyperlinks (those that convert to hyperlinks in MS Word, if auto format of hyperlinks is enabled);
- hyperlinks will be underlined in the print version of the voters' pamphlet;
- table borders will not be published, and cell padding will not be enforced; and
- first line indents, superscript, subscript, and small caps are disallowed.

 The Elections Division may make additional text or format changes to comply with space and word count limitations or to facilitate the use of assistive technology. Statements and arguments will not be returned to filers for proofreading before or after the printing of the voters' pamphlet.

Types of Filings




The types of statements and arguments which may be submitted for inclusion in the state voters' pamphlet are explained in the following sections. It is very important to review the information thoroughly to ensure the statement or argument is submitted to the appropriate filing officer.

Candidate Statements

ORS 251.065-251.095

Any federal or state candidate may file a statement for inclusion in the state voters' pamphlet. Candidates for county, city, and metropolitan service district offices may only file for inclusion in the state voters' pamphlet if a county in the electoral district is not producing a voters' pamphlet.

Voters' Pamphlet Filed For Inclusion With:

	Elections Division	County Elections Official
Federal Candidate	Yes	No
State Candidate	Yes	No
County Candidate	No  Unless county is not producing a voters' pamphlet	Yes
City Candidate	No  Unless county is not producing a voters' pamphlet and the city has a population over 50,000	Yes
Metropolitan Service District Candidate	No  Unless county is not producing a voters' pamphlet	Yes

City or metropolitan service district candidate statements are included in each applicable county that is not producing a voters' pamphlet.



Contact the county elections official for information as to whether the county is publishing a voters' pamphlet and if so, how to be included.



Space in the state voters' pamphlet for city offices is limited to those cities with populations over 50,000. Those cities are Albany, Beaverton, Bend, Corvallis, Eugene, Gresham, Hillsboro, Medford, Portland, Salem and Springfield.




Candidate statements included in the pamphlet are separated by office type and position and are further arranged in the same random order in which the names of candidates will be printed on the ballot. In the primary election pamphlet, partisan candidate statements are further separated by political parties. Statements will be arranged in the following manner:

2018 Primary Election	2018 General Election
→ Independent candidates by position in ballot order	→ partisan candidates by position in ballot order
→ Republican candidates by position in ballot order	→ nonpartisan candidates by position in ballot order
→ Democratic candidates by position in ballot order	
→ nonpartisan candidates by position in ballot order	

Included Information

When published each candidate's statement includes:

- candidate's name;
- candidate's photograph, if submitted;
- office sought;
- party affiliation and party nominations, if applicable;
- occupation;
- occupational background;
- educational background;
- prior governmental experience; and
- candidate's reasons for seeking nomination or election.

 The information required by law—pertaining to occupation, occupational background, educational background and prior governmental experience—is certified as true by the candidate. A remedy for providing false information is to file an action in circuit court under ORS 260.532.

Each candidate statement must begin with the required information of Occupation, Occupational Background, Educational Background and Prior Governmental Experience. These informational headings must be part of the candidate's statement and are included in the maximum word count.



All required information must be submitted or the statement may be rejected.

Statements must use semicolons to separate items such as jobs, organizations, dates, etc. in the required information. Required information submitted in a list format will be changed to a run-on format, using commas, semicolons, and colons as appropriate.

Photographs

Candidates may include a photograph for publication with the candidate statement. To be included in the voters' pamphlet a candidate's photograph must be:

- filed electronically using ORESTAR in .png, .jpg, .gif, or .bmp format;
- less than four years old when filed; and
- front-facing, showing the face, neck and shoulders only.



Hands shall not be shown.

Preferred Photograph Format

It is preferred that a candidate's photograph be:

- 1.5" x 1.75" in size;
- portrait style; and
- black and white.

Photographs must not:

- display anything in the background (this includes, but is not limited to, backdrops, landscaping, paneling, wallpaper, and signs);
- show the candidate wearing clothing which indicates a profession or organization (this includes, but is not limited to, judicial robes, any type of uniform, religious clothing, and hats); and
- display any symbols which indicate a profession, organization, or belief (this includes, but is not limited to, jewelry in the shape of religious symbols and lapel pins of any organization).



Photographs which do not meet the above criteria may be cropped and airbrushed and the cost billed to the candidate.



Photographs will not be returned to the candidate or the candidate's campaign for review before or after printing of the voters' pamphlet.

Guidelines for Required Fields

The following are guidelines to complete the required fields of occupation, occupational background, educational background, and prior governmental experience. Information provided must be accurate.



Making a false statement is a violation of Oregon Election Law, and the candidate may be convicted of a Class C Felony. ORS 260.715(1)



Not every occupational, educational, or prior governmental experience is required to be provided. If the candidate has no relevant experience "None" or other equivalent must be entered.

Occupation and Occupational Background

- **Occupation (present employment – paid or unpaid):** The current full- or part-time employment or other line of work, business, craft, or professional information (not required to indicate whether paid or not paid). If not employed, enter "Not Employed", "None", or other equivalent.
- **Occupational Background (previous employment – paid or unpaid):** Previous full- or part-time employment or other line of work, business, craft, or professional information (not required to indicate whether paid or not paid). If the candidate has no occupational background, enter "None" or other equivalent.

Educational Background

- This may include schools attended by the candidate, including the last level completed; whether a diploma, degree, or certificate was received; and course of study. It is not required that every educational experience be listed, but what is listed must be accurate. Provide the complete name of any school; no acronyms are allowed.
- Other educational experiences of the candidate.



A degree indicates a college, university, or professional school has awarded a title upon the person for completion of a program of study. For this purpose, honorary degrees or degrees from "degree mills" should not be included under this requirement.

Prior Governmental Experience

- The current or previous governmental experience, which refers to a person's involvement in governmental activities, such as appointed boards and commissions, elected boards, and other elected or appointed public offices. Full- or part-time, paid or unpaid, or volunteer experience may be included (not required to indicate whether paid or not paid). If the candidate has no prior governmental experience, enter "None" or an equivalent.

Statement by Political Party or Assembly of Electors

ORS 251.115 and ORS 251.026

The designated officers of any statewide political party may file for inclusion in the state voters' pamphlet a statement that argues for the success of its principles and the election of its candidates on a statewide or county basis or opposes the principles and candidates of other political parties or organizations on a statewide or county basis

In the Primary Election, designated officers of any statewide political party who intend to nominate candidates for the general election may file for inclusion in the state voters' pamphlet, a statement that argues for the success of its principles and the election of its candidates on a statewide or county basis or opposes the principles and candidates of other political parties or organizations on a statewide or county basis.

In the General Election, such a statement may be filed by the designated officers of any political party or assembly of electors who have nominated candidates to the general election.

To file designated officers must:

Primary Election

- electronically submit by email to orestar-support.sos@oregon.gov the statement in a format compatible with Microsoft Word; and
- provide the name, address and phone number of the designated party officer submitting the statement.



The filing is not considered complete and will not be accepted unless received by 5 pm, March 8, 2018.

General Election

- designate a party officer to file the statement;
- provide the Elections Division with the ORESTAR account user name, first and last name, and contact information for that person; and
- file the statement electronically using ORESTAR.



Deadline to Provide ORESTAR User Name and File Statement

ORESTAR User Name August 14, 2018

File Statement August 28, 2018

Measure Arguments

ORS 251.255

A ballot measure argument is a statement supporting or opposing a measure on the ballot. Any person or organization may file an argument in favor of or in opposition to a state measure for inclusion in the voters' pamphlet. A measure argument must be filed by the individual who will be listed as furnishing the information in the Voters' Pamphlet.

Each argument submitted in favor of or in opposition to a measure is assigned a number that will be used to randomly order all arguments submitted for the measure within a category. Arguments in favor of a measure appear first, followed by arguments in opposition to the measure, and are printed in the state voters' pamphlet in the randomly generated order.



A random number generator program will be used to assign the random order.

Included Information

In addition to the arguments supporting or opposing a state measure the following information is included in the state voters' pamphlet for each measure on the ballot:

- ballot title;
- estimate of financial impact;
- explanation of the estimate of financial impact, if determined to be necessary by the committee;
- complete text of the proposed measure; and
- explanatory statement.

Ballot Title

A ballot title is a concise and impartial statement drafted by the Attorney General's office summarizing the measure and consists of:

- a caption of not more than 15 words that reasonably identifies the subject matter of the measure;
- a simple and understandable statement of not more than 25 words that describes the result if the measure is approved;
- a simple and understandable statement of not more than 25 words that describes the result if the measure is rejected; and
- a concise and impartial statement of not more than 125 words summarizing the measure and its major effect.

Financial Impact Statement

An estimate of the financial impact of each state measure is prepared and printed in the state voters' pamphlet and on the ballot. The estimate is prepared by the Financial Estimate Committee, which consists of the Secretary of State (the chair), State Treasurer, Director of the Department of Administrative Services, Director of the Department of Revenue, and a representative of a city, county, or district with expertise in local government finance who is selected by the other four committee members. The committee has several responsibilities.

- 1 The committee estimates the financial impact of a state measure on state and local government revenues and expenditures and files the statement electronically using ORESTAR.



Deadline to File Financial Estimate

Primary Election February 5, 2018

General Election July 30, 2018

The financial estimate and any additional statement explaining the estimate must be filed electronically using ORESTAR. Committees must designate a person to file the estimate or statement and provide the Elections Division with the ORESTAR account user name, first and last name, and contact information for that person.



Deadline to Provide ORESTAR User Name of Designated Filer

Primary Election January 22, 2018

General Election July 16, 2018




Financial estimates must be impartial, simple, and understandable and include:

- the amount, if any, of financial effect on state, local, or tribal government expenditures, revenues, or indebtedness (with specific amounts or ranges of amounts);
 - any such recurring annual amounts;
- and**
- a description of the most likely financial effects if the measure is enacted and (optionally) if it is not enacted.
 - If the financial effect estimated is \$100,000 or less, or the measure is estimated to have no financial effect, a statement to that effect must be printed.

An impartial, simple, and understandable statement explaining the financial effects of the measure, not to exceed 500 words, may also be prepared. This additional financial statement is only printed in the state voters' pamphlet but not on the ballot.

- 2 The committee consults the Legislative Revenue Officer (LRO) to determine if the measure has potentially significant indirect economic or fiscal effects which can be estimated. The Committee must incorporate relevant information prepared by the LRO to estimate any potentially significant indirect economic or fiscal effects.
- 3 The committee considers suggested changes and any other information submitted before or during public hearings held in Salem. To be considered, suggested changes or other information may be considered, provided they are:
 - submitted orally or in writing at the hearing

or

 - submitted in writing to the Secretary of State at any time before the close of the hearing.
- 4 The committee must file a final financial estimate or financial statement if modifications are made.
 -  At least three members of the committee must approve the revised estimate or statement. If a member does not concur, the estimate or statement must show only that the member dissents. The revised statement must be filed electronically using ORESTAR.

**Deadline to File Revised Financial Estimate****Primary Election** February 14, 2018**General Election** August 8, 2018

If a majority of the Committee members do not approve the estimate or statement, the Secretary of State prepares, files, and certifies a financial estimate or statement.

**Deadline for Secretary of State to File Financial Estimate if Committee Does Not****Primary Election** February 16, 2018**General Election** August 10, 2018

- 5 Any person who alleges a financial estimate or statement was prepared in violation of the procedures described in ORS 250.125 and 250.127 may petition the Oregon Supreme Court.

**Deadline to File Petition to Review Financial Estimate Procedures****Primary Election** February 19, 2018**General Election** August 13, 2018

A petition may not be filed challenging the contents of the estimate or statement or whether an estimate or statement should be prepared.



For correct procedures on filing a challenge, refer to the Oregon Rules of Appellate Procedure, Rule 11.30. Contact the Oregon Supreme Court for more information at 503 986 5555.

- 6 The Supreme Court conducts the review and considers the petition expeditiously. After reviewing the procedures, the Supreme Court renders its decision.



If the Supreme Court orders the preparation of a second estimate or statement by the Financial Estimate Committee the estimate or statement is:


- filed not later than two days after the court's decision;
 - subject to a public hearing within two days of filing;
 - certified not later than seven days after the court's decision;
- and**
- may not be appealed.



Explanatory Statement

ORS 251.205, 251.215, 251.225, 251.230, and 251.235

The explanatory statement is an impartial statement explaining the measure. Explanatory statements are prepared for all state measures and are written by a committee of five members including two proponents of the measure, two opponents, and a fifth member appointed by the first four committee members, or, if they fail to agree on a fifth member, appointed by the Secretary of State.

 If a committee does not adopt an explanatory statement, one drafted by the Legislative Counsel Committee is printed.

The explanatory statement must be filed electronically using ORESTAR. Committees must designate a person to file the estimate or statement and provide the Elections Division with the ORESTAR account user name, first and last name, and contact information for that person.

Deadline to Provide ORESTAR User Name of Designated Filer

Primary Election January 22, 2018


General Election July 16, 2018

- Two proponents are appointed to the explanatory statement committee for all state measures.
 - For a legislative referral, one senator and one representative are appointed by the President of the Senate and the Speaker of the House.
 - For an initiative or referendum petition, two proponents are appointed by chief petitioners.

Deadline to Appoint Proponents to Explanatory Statement Committees

Primary Election January 15, 2018

General Election July 9, 2018

 If the legislative officials or chief petitioners fail to appoint the two members to the explanatory statement committee, the Secretary of State appoints two proponents.

Deadline for Secretary of State to Appoint Proponents if Legislative Officials or Chief Petitioners do not

Primary Election January 17, 2018

General Election July 11, 2018

- The Secretary appoints two measure opponents to the committee.

Deadline for Secretary of State to Appoint Opponents

Primary Election January 17, 2018

General Election July 11, 2018

- 3 The four appointed committee members select the fifth member and notify the Secretary, in writing, of the selection.



Deadline for Committee to Select Fifth Member

Primary Election January 24, 2018

General Election July 18, 2018



If the four explanatory statement committee members fail to appoint the fifth member, the Secretary appoints the fifth member.



Deadline for Secretary of State to Select Fifth Member if Committee Does Not

Primary Election January 26, 2018

General Election July 20, 2018

- 4 Explanatory statements are prepared by the Explanatory Statement Committee and the Legislative Counsel Committee. If the Committee fails to adopt an explanatory statement, the one drafted by the Legislative Counsel Committee is printed in the voters' pamphlet. For the Explanatory Statement Committee to adopt an explanatory statement, it must be approved by at least three members. Statements must be filed electronically using ORESTAR.



Both committees prepare and file a statement that:

→ is simple, impartial, and understandable;

→ is 500 words or less;

and

→ explains the measure.



Deadline to File Explanatory Statements

Primary Election February 5, 2018

General Election July 30, 2018

- 5 Public hearings are held in Salem to receive suggested changes or other information relating to the explanatory statement. Suggested changes or other information may:

→ be submitted orally or in writing at the hearing

or

→ be submitted in writing to the Secretary of State at any time before the close of the hearing



Deadline to File Revised Explanatory Statement

Primary Election February 14, 2018

General Election August 8, 2018

- 6 Any person who offered testimony on an explanatory statement may petition the Oregon Supreme Court seeking a different version of that explanatory statement.



Deadline to File Petition to Review Explanatory Statement

Primary Election February 19, 2018

General Election August 13, 2018



For correct procedures on filing a challenge, refer to the Oregon Rules of Appellate Procedure, Rule 11.30. Contact the Oregon Supreme Court for more information at 503 986 5555.

- 7 The Supreme Court conducts the review and considers the petition expeditiously. After reviewing the explanatory statement, the Supreme Court renders its decision. The statement certified by the Supreme Court is the explanatory statement printed in the state voters' pamphlet.

Argument in Support of Legislative Referral

ORS 251.245

When the legislature refers a measure to the ballot, it may submit a voters' pamphlet argument in support of the measure. This argument appears first in the supporting arguments section for a legislative referral.

The President and Speaker appoint a committee to draft the legislative argument in support of the measure, consisting of:

- one Senator and
- two Representatives

The argument may not exceed 325 words and must be filed electronically using ORESTAR. The committee must designate a person to file the argument and provide the Elections Division with the ORESTAR account user name, first and last name, and contact information for that person.



Deadline to Provide ORESTAR User Name of Designated Filer

Primary Election January 22, 2018

General Election July 16, 2018



Deadline to File Argument in ORESTAR

Primary Election March 8, 2018

General Election August 28, 2018

Citizens Initiative Review Commission

ORS 250.137-250.149

The Citizens' Initiative Review Commission will select one or more state measures proposed by initiative petition and convene a separate citizen panel to review each selected measure.

Each citizen panel will:

- evaluate and write statements about the measure to appear in the voters' pamphlet;
- conduct public hearings to receive testimony or other information from both proponents and opponents of the measure; and
- adjust the statements as necessary from testimony received at the public hearings.

The statement may be filed electronically using ORESTAR.



Deadline to File Statement in ORESTAR

Primary Election	March 6, 2018
General Election	August 28, 2018

The panel must designate a person to file the statement and provide the Elections Division with the ORESTAR account user name, first and last name, and contact information for that person.



Deadline to Provide ORESTAR User Name of Designated Filer

General Election	July 16, 2018
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Racial and Ethnic Impact Statement For Measure Related to Crime

ORS 251.185 and House Bill 2238 (2017)

Upon written request from a member of the Legislative Assembly from each major political party, the Oregon Criminal Justice Commission shall prepare a racial and ethnic impact statement for a state measure that is related to crime and likely to have an effect on the criminal justice system.

1 The racial and ethnic impact statement shall:

- describe the effects of the proposed legislation on the racial and ethnic composition of the criminal offender population;
- be impartial, simple, and understandable;
- for racial and ethnic groups for which data are available:
 - ✓ include an estimate of how the proposed legislation would change the racial and ethnic composition of those likely to be convicted of a criminal offense created or modified by the proposed legislation;
 - ✓ include an estimate of the average length of incarceration that each racial and ethnic composition group receives as a sentence, if applicable;
 - ✓ include a statement of the methodologies and assumptions used in preparing the estimate;
 - ✓ include an estimate of the racial and ethnic composition of the crime victims who may be affected by the proposed legislation; and
- adjust the statement as necessary from testimony received at the public hearings.

- 2 The statement must be filed electronically by email to orestar-support.sos@oregon.gov, not later than the following dates, in a format compatible with Microsoft Word. Statements are available as a public record upon filing.



Deadline to File Statement

Primary Election January 25, 2018

General Election July 19, 2018

- 3 The Secretary of State shall hold a public hearing in Salem no later than five days after the statement deadlines above to receive suggested changes or other information relating to the explanatory statement. The Secretary must provide reasonable statewide notice. Suggested changes or other information may:
 - be submitted orally or in writing at the hearing
 - or
 - be submitted in writing to the Secretary of State at any time before the close of the hearing.
- 4 The commission must consider public comments and may file a revised statement electronically by email to orestar-support.sos@oregon.gov, not later than the following dates, in a format compatible with Microsoft Word. Revised statements are available as a public record upon filing.



Deadline to File Revised Statement

Primary Election February 14, 2018

General Election August 8, 2018

Racial and Ethnic Impact Statement For Measure Related to Human Services

ORS 251.185 and House Bill 2238 (2017)

Upon written request from a member of the Legislative Assembly from each major political party, the Department of Human Services shall prepare a racial and ethnic impact statement that describes the effects of a state measure on the racial and ethnic composition of recipients of human services who are in the jurisdiction of the juvenile court under ORS 419B.100 or who receive child welfare services described in ORS 418.005.

- 1 The racial and ethnic impact statement shall:
 - describe the effects of the proposed legislation on the racial and ethnic composition of the recipients of human services who are in the jurisdiction of the juvenile court under ORS 419B.100 or who receive child welfare services described in ORS 418.005.
 - be impartial, simple, and understandable;
 - for racial and ethnic groups for which data are available:
 - ✓ include an estimate of how the proposed legislation would change the racial and ethnic composition of the recipients of human services;
 - ✓ include a statement of the methodologies and assumptions used in preparing the estimate; and
 - adjust the statement as necessary from testimony received at the public hearings.

- 2 The statement must be filed electronically by email to orestar-support.sos@oregon.gov, not later than the following dates, in a format compatible with Microsoft Word. Statements are available as a public record upon filing.



Deadline to File Statement

Primary Election February 5, 2018

General Election July 30, 2018

- 3 The Secretary of State shall hold a public hearing in Salem no later than four days after the statement deadlines above to receive suggested changes or other information relating to the explanatory statement. The Secretary must provide reasonable statewide notice. Suggested changes or other information may:
- be submitted orally or in writing at the hearing
 - or
 - be submitted in writing to the Secretary of State at any time before the close of the hearing.
- 5 The commission must consider public comments and may file a revised statement electronically by email to orestar-support.sos@oregon.gov, not later than the following dates, in a format compatible with Microsoft Word. Revised statements are available as a public record upon filing.



Deadline to File Revised Statement

Primary Election February 14, 2018

General Election August 8, 2018

County, Community College District relating to bonding, or Metropolitan Service District Measures


ORS 251.285


A county, community college district relating to bonding, or metropolitan service district measure may only appear in the state voters' pamphlet in the following circumstances:

- county is not producing a voters' pamphlet;
- a ballot title and explanatory statement are drafted;
- an ordinance is adopted and complied with that provides a review procedure for the ballot title and explanatory statement;
- an ordinance is adopted and complied with that allows for the submission of arguments in support of or in opposition to the measure;
- the fee imposed for submission of arguments does not exceed \$300 or 1,000 signatures; and



→ the county governing body, council of the metropolitan service district, chief petitioners, or political committee that opposes the measure chooses to include the measure in the state voters' pamphlet and files notice with the county elections official or executive officer of the metropolitan service district.

 Arguments are filed with the county elections official or executive of the metropolitan service district who is responsible for compiling and submitting the required information and all arguments to the Elections Division by the filing deadline.

 Contact the county elections official for further information including how to file arguments.

City Measure in State Voters' Pamphlet

There is no provision under state law that allows a city measure to appear in the state voters' pamphlet.

Filing Statements and Arguments

To be included in the state voters' pamphlet all, statements and arguments are required to be filed electronically using ORESTAR and accompanied by the required filing fee or a completed voters' pamphlet petition containing the required number of signatures in lieu of the filing fee. The signature sheets for a completed voters' pamphlet petition are submitted by paper.

Voters' pamphlet filings are submitted while logged into the Private Workshop page in ORESTAR.

 See the [ORESTAR User's Manual: Voters' Pamphlet Filing](#) for detailed instruction on filing electronically.


Voters' Pamphlet Access


To ensure a statement for a state candidate or an argument for a state measure appears in the voters' pamphlet, filers may submit a prospective petition and pay the filing fee. The fee must be paid prior to the filing deadline. If the voters' pamphlet petition is filed with the Elections Division by 5 pm on the filing deadline, and it contains the required number of signatures, the filing fee will be refunded.


Filing by Fee

After launching the Voters' Pamphlet Filing entry pages:

- 1 select Fee as the filing method in the Filing Information Tab;
- 2 complete all required fields in the Filing Information Tab and Statement Tab;
- 3 use the Upload Tab to attach any Statements of Endorsements or a photograph of the candidate; and
- 4 pay the required filing fee using eCheck, VISA, or MasterCard.

 An eCheck is an electronic version of a paper check used to make payments online. It allows filers without a VISA or MASTERCARD to electronically pay the required filing fees.

 If an eCheck is returned due to insufficient funds and the filing deadline has not passed, contact the Elections Division at 503 986 1518 for instruction on resubmitting payment.

 Any statement or argument paid for with an eCheck that is returned due to insufficient funds after the filing deadline will not appear in the voters' pamphlet.

Filing by Petition


After launching the Voters' Pamphlet Filing entry pages, do the following:


1 Prospective Petition

- Select Petition as the filing method in the Filing Information Tab;
- complete all required fields in the Filing Information Tab and Statement Tab;
- use the Upload Tab to attach any Statements of Endorsements or a photograph of the candidate; and
- click Submit Filing.

2 Approval to Circulate

The Elections Division reviews the prospective petition and, if complete, will provide written approval to circulate that includes the number of signatures required, the filing deadline, and:

-  signature sheet template
- a copy of the statement or argument that must be attached to or copied onto the back of the signature sheet template.

 After receiving approval to circulate the statement or argument may not be amended unless the filer begins the petition process again.

3 Format of Petition Signature Sheets

Each signature sheet must meet the following requirements:


- standard 8½ x 11 size paper or equivalent;
- printed on at least 20 pound uncoated paper or equivalent; and
- have the statement or argument either copied on the reverse or attached to the signature sheet.

 No more than five petition sheets may be attached to a single copy of the statement or argument.

4 Gathering Petition Signatures

The legal requirements and guidelines for circulating the petition must be reviewed with circulators prior to collecting any signatures.

- To ensure the petition has a sufficient number of valid signatures, filers are advised to obtain more than the required number of signatures.

 Failure to comply with the legal requirements and guidelines may result in rejection of those sheets.

5 Guidelines for Circulation

To ensure compliance with circulating requirements filers must educate circulators on the guidelines for circulating the statement or argument and monitor their activities.

Circulator Requirements

Each circulator must:	What this means:
→ Personally witness each signature collected.	✓ 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.	✓ Sign the certification using a legal signature. ⓘ A legal signature is defined as a signature possessing 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.
→ Provide the date when the certification was signed.	✓ The date must be provided in month, day, year order if written in all numbers.

! A circulator's failure to comply with 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;
 ⓘ Only active registered voters in the candidate's district or who would be eligible to vote for the measure 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; and
- sell or offer to sell signature sheets.

Signer Requirements

Each petition signer must:	What this means
→ Signers must provide an original signature but are encouraged to provide their printed name, date signed, and address.	✓ Petition signers must sign the petition using a signature contained in their voter registration record.
For candidate statements → Signers must be an active registered voter in the candidate's electoral district.	✓ Information in the voter registration record is up to date, and the signer would be able to vote on candidates for the office at a general election or on the measure.
For state measure arguments → Signers must be an active registered voter.	

Signature Date

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

- ✓ was an active registered voter between the date the petition was approved to circulate and the circulator's certification date or
- ✓ originally registered to vote on or after the date the petition was approved to circulate 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 provides an ambiguous date such as a 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 pm if completed electronically online at www.oregonvotes.gov.

6 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 with a minimum of a first-name initial and full last name and by providing the date when the certification was signed.

i 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 determined to be insufficient the signature sheet may be rejected. Prior to submission for signature verification the circulator may correct only the following defects:

Circulator Signature Defects

If the circulator has:	Then the circulator should:
→ signed using only initials; i Unless verified by exemplar.	✓ re-sign and re-date certification with legal signature;
→ signed using a signature stamp; i 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; i Unless verified by exemplar.	✓ re-sign and re-date certification with legal signature;
→ photocopied or carbon copied the certification; or	✓ 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 provided 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 submitted that contains 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; <i>i</i> This 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 <i>i</i> This does not apply if the only signers and the circulators are the same people.
→ white-out 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](#) located at www.oregonvotes.gov.

7 Signature Verification and Completing the Petition

Filers submit signature sheets containing at least 100% of required number of signatures to the appropriate elections official for verification against the voters' registration record, allowing sufficient time for the verification process to be completed prior to the filing deadline.

! The Elections Division will not accept signatures for verification or certified signature sheets prior to the first day to file by fee or completed petition.

? See [Filing Requirements](#) on page 4.

i The elections official is not required to begin verification until the raw number of signatures submitted is equal to or exceeds the required number of signatures.

Before submitting the signature sheets for verification, statement and argument filers must ensure each signature sheet certification is signed and dated by the circulator.

Verification Conducted by Elections Division

If the Elections Division is the elections official that will conduct signature verification, the filer must also complete and submit:



Form SEL 338 Petition Submission

Verification Conducted County Elections Official

To complete the petition process, a statement or argument filer must submit to the Elections Division:



Completed form SEL 338 Petition Submission

→ signature sheets, certified by the county elections official, that contain the required number of valid signatures.

8 Signature Tally

Each signature sheet is reviewed and removed by the Elections Division if:

→ signatures were gathered on a signature sheet that was not approved for circulation;



Unapproved petition sheets and those that do not comply with legal requirements and guidelines will be rejected.

→ the circulator failed to sign and date the certification;

→ the circulator signed the certification before all signers on the signature sheet;

→ any sheet where the circulator certification contains an incurable defect; and

→ all information included in the optional information fields about petition signers, such as printed name, address and date signed, does not comply with OAR 165-014-0275.

After tabulating the number of signatures contained on the accepted signature sheets the Elections Division notifies the filer of the final tally.



If the petition does not contain the required number of valid signatures and the filing deadline has not passed, additional signatures may be submitted.

Amending a Filing

Statements and arguments may be amended in ORESTAR until 5 pm on the filing deadline day for the election. Filers may change the statement or argument, provide SEL 400s, or replacement or substitute photographs.

If the filer is submitting signatures in lieu of the filing fee, the statement or argument may not be amended unless the filer begins the petition process again or pays the required filing fee.



See the [ORESTAR User's Manual: Voters' Pamphlet Filing](#) for detailed instruction on amending a voters' pamphlet statement or argument electronically.

Withdrawing a Filing

Statements and arguments may be withdrawn in ORESTAR until 5 pm on the filing deadline day for the election. Once withdrawn, the statement or argument cannot be re-activated but may be re-filed as long as the filing deadline has not passed. Any signatures collected in lieu of the filing fee for the withdrawn statement or argument may not be re-used. Any required fee that was paid will be refunded.



Candidates that withdraw their candidacy in accordance with the Candidates Manual, but after the voters' pamphlet filing deadline, will not appear in the voters' pamphlet and any filing fee paid will be refunded.



Forms are available online at www.oregonvotes.gov.

Compliance

ORS 251.049, 251.055, 251.075, 251.085, and 251.260

Review of Statements

After the deadline each statement is reviewed by the **Elections Division** to ensure:

- ✓ the statement begins with the required information, which includes occupation, occupational background, educational background, and prior governmental experience;
- ✓ the photograph, if submitted, is in compliance with the requirements of ORS 251.075;
- ✓ the statement does not contain any obscene, profane, or defamatory language; incite or advocate hatred, abuse, or violence toward any person or group; or contain any language which may not legally be circulated through the mail; and
- ✓ a statement of endorsement is provided when the name of a person or organization is used or if the name is used with a quotation, that the statement contains the proper attribution.

Statement of Endorsement Agreement

Conflicts between the [SEL 400](#) and the statement or argument are resolved in the following manner:

- When reviewed, if both Option 1 and Option 2 are selected on the [SEL 400](#) and nothing has been entered in the Required Reproduction box, the [SEL 400](#) will be accepted as if only Option 1 had been selected.
- When reviewed, if both Option 1 and Option 2 are selected on the [SEL 400](#) and the endorser has entered information in the Required Reproduction box, the [SEL 400](#) will be accepted as if only Option 2 had been selected.
- The information entered in the Required Reproduction box, if any, governs representation and spelling of name, title, and organization, identifying endorsers in the statement or argument.
- The statement or argument governs variations in punctuation, abbreviations, and capitalizations.
- The statement or argument may include geographic identifiers and other descriptors such as occupation not listed in the Required Reproduction box on the [SEL 400](#).



The Elections Division will administratively revise and bring into compliance any statement identified as not in compliance with the Required Reproduction box on the Statement of Endorsement forms submitted if:

- ✓ the statement, after revision, does not exceed 325 words or 30 square inches of space and
- ✓ the revision maintains the format of the statement.


The Elections Division will contact the filer of a statement not administratively revised to provide the reasons why material fails to comply with applicable statutes and provide the deadline to submit requested corrections.

Review of Arguments

After the deadline, each argument is reviewed by the **Elections Division** to determine if an error was made in:

- identifying the measure number to which the argument relates or

→ designating that the argument supports or opposes the measure.

 The Elections Division also reviews each argument for statement of endorsement agreement and may make any necessary changes to correct or bring the material into compliance.


Correcting Material after Deadline

If corrections to a statement, photograph, statement of endorsement, or argument are necessary, the Elections Division will attempt to contact the filer using the contact information provided in the filing.

Contact means:


- speaking with any person or leaving a message on an answering device;
- sending an email; or
- receiving a fax confirmation report showing a successful transmission.

After identifying materials that require correction or violate statutory provisions, the Elections Division provides the necessary information to correct or bring the material into compliance, if allowed, as outlined below.

 Additional changes to the statement or argument that were not identified by the Elections Division cannot be made.

The Elections Division will provide the statement or argument filer with the reasons why the material fails to comply with applicable statutes and provide the deadline to submit requested corrections.

→ Revisions may be emailed, faxed, hand-delivered, mailed, or taken over the phone.

 If the statement or argument is revised over the phone a written confirmation of the revisions may be required.

→ A revised portrait may be emailed, hand-delivered, or mailed.

If the Elections Division is unable to contact the filer, or the filer fails to submit the requested corrections by the deadline, the material will be rejected or edited as necessary.

Deadline to Correct Material

	Primary Election	General Election
Review	March 13, 2018	August 31, 2018
Contact	March 15, 2018	September 4, 2018
Correct	March 19, 2018	September 6, 2018



List of Forms

SEL 338

Petition Submission – Initiative, Referendum, Recall, Political Party Formation

SEL 400

Statement of Endorsement