

TRANSPARENT ELECTION INITIATIVE



Transparent Election Initiative: Standard Operating Procedure for Signature Gathering

1.0 Introduction and Purpose

This Standard Operating Procedure (SOP) is the official field guide for all volunteers participating in the Transparent Election Initiative (TEI). It has been designed to ensure that every signature collected is valid and contributes directly to our ultimate goal of qualifying the initiative for the ballot. Strict adherence to these procedures is not only recommended for operational success but is critical for maintaining legal compliance throughout the campaign.

The primary objective of this SOP is to provide a clear, step-by-step process that maximizes the collection of valid signatures while upholding the highest standards of professionalism and accuracy.

The following procedures represent the foundational steps for all effective and compliant fieldwork.

2.0 Pre-Deployment Preparation: Setting Up for Success

Thorough preparation is a strategic imperative. Preparing your materials correctly *before* engaging with voters prevents common errors, increases your efficiency in the field, and projects a professional image that reflects positively on the campaign.

2.1 Required Field Supplies

Every volunteer must be equipped with the following mandatory supplies. Each item serves a specific function, and having them ready is essential for a productive day.

- **TEI Volunteer Badge:** This must be worn and clearly visible at all times. It establishes your credibility as an official representative of the campaign.
- **Pens:** A sufficient supply of multiple pens is necessary to avoid delays and ensure you are never without a working writing instrument.
- **Weather-Appropriate Attire:** Your personal safety and endurance are paramount. Dressing appropriately for the weather conditions allows you to remain effective and comfortable for the duration of your volunteer shift.

2.2 Clipboard Assembly Protocol

Assembling your clipboard correctly is a critical step in preventing invalid signatures. Follow these instructions precisely.

1. **Gather Core Components:** Each signature gathering setup requires a clipboard and a sufficient supply of official signature sheets. Ensure you have plenty in case you encounter a high volume of supportive voters.
2. **Implement Multi-County Protocol:** When attending an event where voters from multiple counties may be present, you must use one dedicated and clearly labeled clipboard for each anticipated county. Use masking tape to label each clipboard (e.g., "Cascade," "Meagher," etc.). This protocol is mandatory to prevent signatures from different counties from being placed on the same sheet, which would invalidate them.
3. **Attach Initiative Text:** The full text of the Transparent Election Initiative must be placed at the bottom of the stack of signature sheets on *each* clipboard. This ensures the document is available for any voter who wishes to review it before signing.

With your materials correctly assembled, you are ready for direct voter engagement.

3.0 Voter Engagement Protocol

The initial interaction with a potential signer is a critical moment. This phase is designed to quickly identify eligible voters, effectively communicate the initiative's core purpose, and secure their support in a professional and compelling manner.

3.1 Initial Approach and Framing

Your opening questions set the tone for the entire interaction. The following sample questions are designed to be concise and effective.

- "Have you heard about the Transparent Election Initiative?"
- "We are gathering signatures to get corporate money (or dark money) out of Montana elections. Does that sound like a good idea to you?"
- "Your signature can help us qualify this initiative for the ballot next November. Do you want to help us get dark money out of Montana elections?"

These questions are strategically designed to first gauge awareness, then introduce the core issue in relatable terms, and finally, present a direct and empowering call to action.

3.2 Voter Qualification and Verification

Before a signature is collected, you must confirm the voter's eligibility. Asking the following mandatory qualification questions for every potential signer is essential to prevent the collection of invalid signatures.

1. "Are you a registered voter in Montana?"

2. "Which County do you live in?" (This is a critical step. Never assume a voter's county of residence.)
3. "Have you moved recently?" (The address provided on the petition must exactly match the address on file with their official voter record.)

For any voter who is unsure of their registration status or the exact address on file, you may direct them to the official verification resource. Encourage them to visit the [Montana Voter Portal](#) online (this can be found by searching for "Montana My Voter Page").

3.2.1 Using the 'My Voter Page' Resource

The "[My Voter Page](#)" is an invaluable tool for ensuring data accuracy. When possible, encourage voters to access the site to confirm the following key details:

- Verification that their residential address is correct in the state's file.
- Confirmation that their voter status is listed as 'Active'.
- Identification of their specific House District (e.g., HD 45).

Once a voter's eligibility is confirmed, you are prepared to address any questions they may have.

This is not a necessary step, if you/the voter is unable to navigate and check the MyVoterPage, continue the signature collection and encourage them to check when it is convenient for them. It is always good information for the voter!

4.0 Communicating the Initiative's Core Principles

Maintaining clear, consistent, and accurate messaging is essential. The following official talking points are designed to inform voters concisely and help you handle common questions without engaging in lengthy debates.

Official Talking Points

- **Constitutional Amendment:** This initiative will amend our Montana constitution to change the rules about how corporations operate. Right now, corporate charters give them general powers to do anything legal under the law. This will provide corporations have the same powers to do anything that is legal **except** give corporate money to politicians and ballot issues.
- **Individual Rights:** This will not affect the rights of any human being. Real people can still give their money, but they will have to follow our rules and identify themselves. No more dark money.
- **Scope of Impact:** This affects all corporations, no exceptions, from Wall Street banks to labor unions.
- **Campaign Transparency:** Yes, we are operating under the current rules, but we are fully transparent with our donors. We want to change the rules of the game, but we have to play by the rules as they are right now.

Crucial Rule of Engagement

Please do not argue or lecture. That won't help. Most people will gladly sign.

Your objective is to efficiently and respectfully gather valid signatures, not to win debates. A positive and professional demeanor is your most effective tool.

With the voter informed and ready, you can proceed to capture their signature.

5.0 Signature Collection and Quality Assurance

This is the most critical phase of the signature gathering process. Meticulous attention to detail at this stage directly determines whether a signature will be validated or rejected by election officials. Your diligence here impacts the success of the entire campaign.

5.1 Execution of the Signature

Follow this strict protocol as the voter is signing the petition. Before handing over the clipboard, perform a final confirmation of the voter's eligibility and county of residence.

1. **Confirm the Correct County Sheet:** Based on the voter's confirmed county of residence, provide them with the correct, corresponding clipboard and signature sheet.
2. **Mandate Direct Observation:** You MUST personally witness every signature as it is being signed. Never leave clipboards unattended for voters to sign at their leisure.
3. **Prohibit Proxy Signing:** No individual can sign on behalf of anyone else. If a voter asks, "Can I sign for my husband/wife/mom/dad/etc.?" the answer must be a polite but firm **NO**.

5.2 Immediate Post-Signature Review

Before the signer walks away, you must perform an immediate quality check of their entry. Use this checklist to verify the information.

- **Legible Printed Name:** Is the printed name clear and easily readable? An illegible printed name is the most common reason for a signature to be rejected.
- **Correct Address:** Does the address written on the sheet match the address the voter has on file with their voter record?
- **Signature Present:** Has the voter completed the signature field?
- **Date Correct:** Is today's date correctly and fully entered?

5.3 Error Correction and Sheet Management

Mistakes and external factors can compromise a signature sheet. Follow these procedures for handling common issues.

- **For corrections:** If a voter makes an error, instruct them to perform the "do-over" procedure. Have the signer draw a single, clean line through the entire incorrect entry, initial it, and then fill out a new, empty line.

- **For Uncertain Entries:** If you are in doubt about any part of a voter's entry (e.g., their county, their legibility), it is always safest to have them complete a new line on a fresh sheet. Set the uncertain sheet aside to be reviewed by your community lead.
- **For environmental damage:** If it begins to rain or snow, immediately cover your clipboards and move to a dry, protected location to prevent water damage.
- **For sheet security:** Protect those signature sheets like a new baby. Sheets that are lost, missing, damaged, or blown away in the wind are not helpful.

Properly collected signatures must then be prepared for official submission.

6.0 Post-Collection Batching Procedure

The batching process organizes signed sheets for efficient, compliant submission to election officials. This procedure also prevents the loss or damage of sheets by discouraging volunteers from holding onto completed forms for extended periods.

Primary Directive: Submit Often

Do not hold on to completed signature sheets any longer than absolutely necessary. Submitting small, frequent batches is the preferred and safest method. We do not want completed sheets sitting in your car or at your house.

Batch Preparation Rules

The following requirements for creating a valid batch are non-negotiable.

1. **Single County per Batch:** All signature sheets included in a single batch *must* be from the same county.
2. **Maximum Sheet Count:** A batch cannot contain more than 25 signature sheets. There are no exceptions to this rule.
3. **Attach Full Text:** The full text of the initiative must be attached to each batch.
4. **No Staples:** Sheets must be held together with a paperclip. **Do not use staples.** Staples can damage the sheets and interfere with the scanning and processing procedures used by county election officials, potentially jeopardizing the entire batch.

6.1 Unsworn Declaration Completion

The volunteer who personally gathered the signatures must complete and sign the Each submission consists of a single, completed unsworn statement attached to a batch of no more than 25 petition signature sheets This is a formal 'unsworn declaration' affirming you witnessed every signature.

The date range you enter on the affidavit must exactly match the earliest and latest signature dates found within that specific batch.

- **Warning:** Any signatures on the sheets with dates that fall outside the date range listed on the affidavit will be invalidated by election officials.

Your prepared batch is now ready for the final step in the process.

7.0 Official Submission Protocol

This final step in the workflow ensures that your collected signatures are properly submitted and that the campaign receives official documentation of their delivery.

7.1 Delivery Instructions

There are two approved methods for submitting a prepared and verified batch of signatures.

- **Method 1:** Deliver the batch to your designated TEI Community Lead.
- **Method 2:** When specifically instructed by your lead, deliver the batch directly to your county's election administrator, whose office is typically located in the county clerk's office.

7.2 Receipt and Reporting - The Final Step

Submitting the batch is not the end of the process. The following documentation steps are mandatory to close the loop and verify submission.

1. **Wait for the Receipt:** When delivering to a county official, you must wait for the election administrator to process the batch and provide you with an official receipt.
2. **Save the Receipt:** This receipt is your proof of submission. It must be saved carefully.
3. **Report to Coordinator:** You must send a copy of the receipt (a clear photo is acceptable) to your TEI county coordinator. This final action confirms the batch has been successfully delivered and allows for accurate campaign-wide tracking.

Thank you for your meticulous work and dedication. Your efforts to follow these procedures are crucial to the success of the Transparent Election Initiative.

