



THE FLORIDA LEGISLATURE



OFFICE OF ECONOMIC AND DEMOGRAPHIC RESEARCH

BILL GALVANO
President of the Senate

JOSE R. OLIVA
Speaker of the House of
Representatives

August 23, 2019

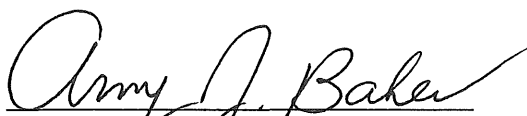
The Honorable Laurel M. Lee, Secretary of State
Florida Department of State
R. A. Gray Building
500 South Bronough Street
Tallahassee, Florida 32399-0250

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TALLAHASSEE, FLORIDA

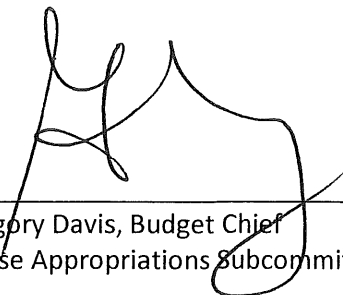
Dear Secretary Lee:

Section 100.371(13)(a), F.S., requires that the Financial Impact Estimating Conference submit a financial impact statement to the Attorney General and Secretary of State within 75 days after receipt of an initiative petition from the Secretary of State.

By this letter, the Financial Impact Estimating Conference is submitting the attached financial impact statement for the initiative petition entitled *All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet*, Serial Number 19-07.


Amy J. Baker, Coordinator
Office of Economic and Demographic Research


Mark Kruse, Policy Coordinator
Executive Office of the Governor, OPB-TED


Gregory Davis, Budget Chief
House Appropriations Subcommittee, T&T


Jennifer Hrdlicka, Staff Director
Senate Appropriations Subcommittee, TTED



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BILL GALVANO
President of the Senate

JOSE R. OLIVA
Speaker of the House of Representatives

August 23, 2019

The Honorable Ashley Moody, Attorney General
Office of Attorney General
State of Florida
The Capitol PL-01
Tallahassee, Florida 32399-1050

Dear Attorney General Moody:

Section 100.371(13)(a), F.S., requires that the Financial Impact Estimating Conference submit a financial impact statement to the Attorney General and Secretary of State within 75 days after receipt of an initiative petition from the Secretary of State.

By this letter, the Financial Impact Estimating Conference is submitting the attached financial impact statement for the initiative petition entitled All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet, Serial Number 19-07.

[Signature of Amy J. Baker]
Amy J. Baker, Coordinator
Office of Economic and Demographic Research

[Signature of Mark Kruse]
Mark Kruse, Policy Coordinator
Executive Office of the Governor, OPB-TED

[Signature of Gregory Davis]
Gregory Davis, Budget Chief
House Appropriations Subcommittee, T&T

[Signature of Jennifer Hrdlicka]
Jennifer Hrdlicka, Staff Director
Senate Appropriations Subcommittee, TTED

AUG23'19 RCVD
[Signature]
Jaomi Howard-Dillon

FINANCIAL IMPACT ESTIMATING CONFERENCE

FINANCIAL IMPACT STATEMENT

All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet (19-07)

It is probable that the proposed amendment will result in additional local government costs to conduct elections in Florida. The Financial Impact Estimating Conference projects that the combined costs across counties will range from \$5.2 million to \$5.8 million for each of the first three election cycles occurring in even-numbered years after the amendment's effective date, with the costs for each of the intervening years dropping to less than \$450,000. With respect to state costs for oversight, the additional costs for administering elections are expected to be minimal. Further, there are no revenues linked to voting in Florida. Since there is no impact on state costs or revenues, there will be no impact on the state's budget. While the proposed amendment will result in an increase in local expenditures, this change is expected to be below the threshold that would produce a statewide economic impact.

FINANCIAL IMPACT ESTIMATING CONFERENCE

INITIATIVE FINANCIAL INFORMATION STATEMENT SUMMARY

All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet (19-07)

Based on a survey of the county supervisors of elections in Florida conducted by the Financial Impact Estimating Conference, it is probable that the proposed amendment will result in additional local government costs to conduct elections. The Conference projects that these costs will range from \$5.2 million to \$5.8 million for each of the first three election cycles occurring in even-numbered years after the amendment's effective date, with the costs for each of the intermediate years dropping to less than \$450,000. The expected costs for individual counties varied among the respondents to the survey. Some expected no additional costs, while the county with the largest number of registered voters (Miami-Dade) projected nearly \$680,000 in additional costs per even-numbered election cycle. While some supervisors of elections identified the potential for savings from new efficiencies, the Conference could not quantify the amount. To the extent that any savings materialize, they would reduce or eliminate additional costs. At the state level, the additional costs for administering elections are expected to be minimal. There are no state or local government revenues linked to voting in Florida.

Since there is no impact on state costs or revenues, there will be no impact on the state's budget. While the proposed amendment will result in an increase in local expenditures, this change is expected to be below the threshold that would produce a statewide economic impact.

FLORIDA FINANCIAL IMPACT ESTIMATING CONFERENCE
All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet
Serial Number 19-07
August 23, 2019

FINANCIAL IMPACT STATEMENT

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SUMMARY OF INITIATIVE FINANCIAL INFORMATION STATEMENT

Based on a survey of the county supervisors of elections in Florida conducted by the Financial Impact Estimating Conference, it is probable that the proposed amendment will result in additional local government costs to conduct elections. The Conference projects that these costs will range from \$5.2 million to \$5.8 million for each of the first three election cycles occurring in even-numbered years after the amendment's effective date, with the costs for each of the intermediate years dropping to less than \$450,000. The expected costs for individual counties varied among the respondents to the survey. Some expected no additional costs, while the county with the largest number of registered voters (Miami-Dade) projected nearly \$680,000 in additional costs per even-numbered election cycle. While some supervisors of elections identified the potential for savings from new efficiencies, the Conference could not quantify the amount. To the extent that any savings materialize, they would reduce or eliminate additional costs. At the state level, the additional costs for administering elections are expected to be minimal. There are no state or local government revenues linked to voting in Florida.

Since there is no impact on state costs or revenues, there will be no impact on the state's budget. While the proposed amendment will result in an increase in local expenditures, this change is expected to be below the threshold that would produce a statewide economic impact.

SUBSTANTIVE ANALYSIS

A. Proposed Amendment

Ballot Title:

All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet

Ballot Summary:

Allows all registered voters to vote in primaries for state legislature, governor, and cabinet regardless of political party affiliation. All candidates for an office, including party nominated candidates, appear on the same primary ballot. Two highest vote getters advance to general election. If only two candidates qualify, no primary is held and winner is determined in general election. Candidate's party affiliation may appear on ballot as provided by law. Effective January 1, 2024.

Article and Section Being Created or Amended:

Article VI, Section 5

Full Text of the Proposed Amendment: [Additions are underlined]

ARTICLE VI, SECTION 5. Primary, general, and special elections.—

(c) All elections for the Florida legislature, governor and cabinet shall be held as follows:

(1) A single primary election shall be held for each office. All electors registered to vote for the office being filled shall be allowed to vote in the primary election for said office regardless of the voter's, or any candidate's, political party affiliation or lack of same.

(2) All candidates qualifying for election to the office shall be placed on the same ballot for the primary election regardless of any candidate's political party affiliation or lack of same.

(3) The two candidates receiving the highest number of votes cast in the primary election shall advance to the general election. For elections in which only two candidates qualify for the same office, no primary will be held and the winner will be determined in the general election.

(4) Nothing in this subsection shall prohibit a political party from nominating a candidate to run for office under this subsection. Nothing in this subsection shall prohibit a party from endorsing or otherwise supporting a candidate as provided by law. A candidate's affiliation with a political party may appear on the ballot as provided by law.

(5) This amendment is self-executing and shall be effective January 1, 2024.

B. Effective Date

Article XI, Section 5(e) of the Florida Constitution states: "Unless otherwise specifically provided for elsewhere in this constitution, if the proposed amendment or revision is approved by vote of at least sixty percent of the electors voting on the measure, it shall be effective as an amendment to or revision of the constitution of the state on the first Tuesday after the first Monday in January following the election, or on such other date as may be specified in the amendment or revision."

In this case, the language in the proposed amendment indicates that it is effective January 1, 2024.

C. Formal Communications to and from the Sponsor, Proponents, and Opponents

The Sponsor, All Voters Vote, Inc., designated Glenn Burhans, Jr., Chairman of All Voters Vote, Inc., and Steve Vancore to speak on its behalf at meetings held by the Financial Impact Estimating Conference (FIEC). The Conference also sought input from those groups who were on record as supporting or opposing the petition initiative. However, none were identified.

D. Input Received from the Sponsor, Proponents, Opponents, and Interested Parties

The Conference invited Maria Matthews from the Department of State, Division of Elections, and Paul Lux, Supervisor of Elections from Okaloosa County and Past President of the Florida State Association of Supervisors of Election (FSASE), to present information regarding the potential impact to their offices. Ms. Matthews indicated that the Department of State does not believe that there will be any fiscal impact beyond nominal at the state level and that the fiscal impact would most likely be felt at the local level. Mr. Lux detailed the design changes that may be needed to a ballot and the possible associated costs. Both presenters also mentioned that there are some areas that may need further clarification or law changes if the proposed amendment were to pass. These would include the treatment of universal primaries, ties, write-in candidates, etc.

While Mr. Burhans was unable to be present at the FIEC due to scheduling conflicts, he submitted the following written information:

“The purpose of the All Voters Vote Initiative is to enable all qualified registered voters to vote in primary elections for state Legislature, Governor and Cabinet. If adopted, the amendment would require different types of primary ballots to be prepared by County Supervisors of Elections, however, the number of such ballots is not expected to be materially different than the number of those in use now. As a result, we believe that the proposed amendment: (i) will have no economic impact on the state or local economy; (ii) will not result in any increase or decrease in revenues to state or local governments; and (iii) will not result in any increase or decrease in costs to state or local governments and, if there is any increase in costs it would be negligible.”

E. Background

Article VI, Section 5 of the Florida Constitution directs that “a general election shall be held in each county on the first Tuesday after the first Monday in November of each even-numbered year to choose a successor to each elective state and county officer whose term will expire before the next general election and, except as provided herein, to fill each vacancy in elective office for the unexpired portion of the term.” Section 100.061, F.S., states that “in each year in which a general election is held, a primary election for nomination of candidates of political parties shall be held on the Tuesday 11 weeks prior to the general election.”¹ Section 101.151(9)(a), F.S., directs the Department of State to adopt rules “...prescribing a uniform primary and general election ballot for each certified voting system.” These rules set guidelines for ballot title, ballot directions and instructions including location, individual race layout, overall ballot layout and types of vote targets. Pursuant to this direction, the Department of State adopted 1S-2.032 Uniform Design for Election Ballots, Florida Administrative Code. The rule requires the primary election ballot title to be printed single spaced, flush-left or centered across the page, and include either the name of party or nonpartisan, as applicable.²

F. Discussion of Impact of Proposed Amendment

Section 100.371, F.S., requires the FIEC to review, analyze, and estimate the financial impact of amendments to or revisions of the State Constitution proposed by initiative. In this regard, the FIEC considers whether the proposed amendment increases or decreases any revenues or costs to state and local governments, the estimated economic impact on the economy, and the overall impact to the state budget.

The proposed amendment, *All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet*, establishes in Florida what is otherwise known as a “top-two” primary system. The amendment adds (c) to Article VI, Section 5 of the Florida Constitution, stating that “A single primary election shall be held for each office. All electors registered to vote for the office being filled shall be allowed to vote in the primary election for said office regardless of the voter’s, or any candidate’s, political party affiliation or lack of same.” Currently, as noted above in the discussion regarding the Florida Administrative Code, separate primary ballots are prepared for the Democrat, Republican, or purely nonpartisan slates. If required, a separate ballot can also be prepared for minor party primaries; however, these occurrences are rare. If passed, the amendment would require that “all candidates qualifying for election to the office shall be placed on the same ballot for the primary election regardless of any candidate’s political party affiliation or lack of same.” The two candidates who receive the highest number of votes in the primary election would

¹ Florida Constitution and 2019 Florida Statutes retrieved from www.leg.state.fl.us, accessed August 2019.

² Florida Administrative Code retrieved from www.flrules.org, accessed August 2019.

advance to the general election. For elections in which only two candidates qualify for the same office, no primary will be held. Instead, the winner would be determined at the general election.

Top-Two Primaries in Other States

According to the National Conference of State Legislatures, two other states employ the “top-two” primary system. In 2004, the state of Washington enacted Initiative 872 by a vote of 59.9% yes to 40.1% no, resulting in a top-two primary for all statewide elections. A fiscal analysis attached to the State of Washington Voters’ Pamphlet for the General Election held on November 2, 2004, was prepared by the Washington Office of the Secretary of State. It indicated that the initiative would have one-time costs of \$1.3 million for public education and voter notification, but that there would also be \$6 million in annual savings due to ballot size, the number of ballots, and associated processing procedures.³

Likewise, California enacted a top-two primary system for statewide offices by passing Proposition 14 during the Primary Election held on June 8, 2010, by a vote of 53.7% yes to 46.3% no. Prior to that, the California Legislative Analysis Office analyzed the potential fiscal impact of the measure. The analysis concluded that the measure would result in no significant change to the cost of administering elections. While analysts acknowledged that state and county costs could increase from having to prepare, print, and mail longer ballots, the measure would also result in savings by eliminating the need to prepare different primary ballots per party and shorter general election ballots. These costs and savings were expected to be minor and offsetting.⁴

Costs and Revenues

The proposed amendment would have no impact on state or local revenues because there is no relationship between the changes being made and any state or local revenue stream. In addition, because elections are primarily operated at the local level, any additional costs accruing to state government are expected to be minimal. At the local level, a series of possible additional costs and savings were initially identified by the Legislative Office of Economic and Demographic Research.

In late July through early August 2019, staff assigned to FIEC conducted a survey of county supervisors of elections in an effort to determine the projected costs and savings to county governments resulting from implementation of the proposed constitutional amendment. The survey questionnaire was emailed to the supervisors on Thursday, July 25th, with a response requested by Friday, August 2nd. The FSASE assisted in the FIEC’s research effort by also notifying supervisors of the survey and encouraging completion of the survey questionnaire.

Assuming the proposed amendment would be enacted, supervisors were asked if their respective offices would incur increased costs or realize savings. If they responded yes to either anticipated costs or savings, supervisors were asked to indicate which of the following operational areas would incur additional costs or realize savings: 1) compiling results, 2) equipment at polling sites, 3) mailing, 4) number of polling sites, 5) printing, 6) programming, 7) staffing, and 8) other. Additionally, for each local fiscal year 2020-21 through 2028-29, supervisors were asked to estimate the total additional costs and/or total savings. If no costs and/or savings were anticipated in a given fiscal year, supervisors were asked to indicate \$0. Furthermore, supervisors were offered the opportunity to provide additional written comments regarding the impact of the proposed amendment on their respective offices.

³ Voters’ Pamphlet for the November 2, 2004, General Election, Washington Office of the Secretary of State.

⁴ Fiscal Analysis for Proposition 14 Elections: Open Primaries, as prepared by the California Legislative Analysis Office on February 18, 2010.

Thirty-four county supervisors of elections did not submit a survey response; however, 33 supervisors did respond, which resulted in a 49% response rate. Of the 33 responses received, 6 supervisors (i.e., Collier, Duval, Hillsborough, Leon, Marion, and Putnam) indicated that anticipated implementation costs would be \$0 during local fiscal years 2023-24 through 2028-29. Fifteen supervisors (i.e., Alachua, Bradford, Citrus, Clay, Hernando, Lafayette, Levy, Manatee, Marion, Miami-Dade, Osceola, Pinellas, St. Johns, St. Lucie, and Seminole) indicated that anticipated implementation costs would be a specific amount greater than \$0, and 11 supervisors (i.e., Columbia, Flagler, Hendry, Holmes, Jackson, Okaloosa, Okeechobee, Orange, Santa Rosa, Suwannee, and Wakulla) indicated that implementation costs were unknown. Staff assigned to FIEC elected to exclude the cost figures provided by a single county, Broward, from its analysis because the reported figures were deemed outliers relative to the cost figures reported by other populous counties. In the even-numbered election years of 2024, 2026, and 2028, Broward County’s anticipated costs were 203%, 220%, and 246% higher, respectively, than the combined costs of the 21 counties that provided cost figures. After reviewing this data, the FIEC agreed that the inclusion of Broward’s cost figures would distort the results of the analysis.

For the 21 counties that provided cost figures (i.e., Alachua, Bradford, Citrus, Clay, Collier, Duval, Hernando, Hillsborough, Lafayette, Leon, Levy, Manatee, Marion, Martin, Miami-Dade, Osceola, Pinellas, Putnam, St. Johns, St. Lucie, and Seminole), the total reported costs by local fiscal year are as follows:

Projected Costs by Fiscal Year from Survey Responses						
Fiscal Year	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
	\$1,954,143	\$95,305	\$2,078,482	\$96,159	\$2,152,813	\$97,552

In its analysis, staff assigned each county to one of five county groups, based on its number of active registered voters as of June 30, 2019.⁵ When staff sorted counties by their respective number of active registered voters from high to low, natural breaks in the data were observed which made assignment to county groups reasonable. The assignment of each county to its respective group is summarized below and illustrated by the accompanying map.

Group 1: The 5 counties of: Broward, Hillsborough, Miami-Dade, Orange, and Palm Beach.

Group 2: The 6 counties of: Brevard, Duval, Lee, Pinellas, Polk, and Volusia.

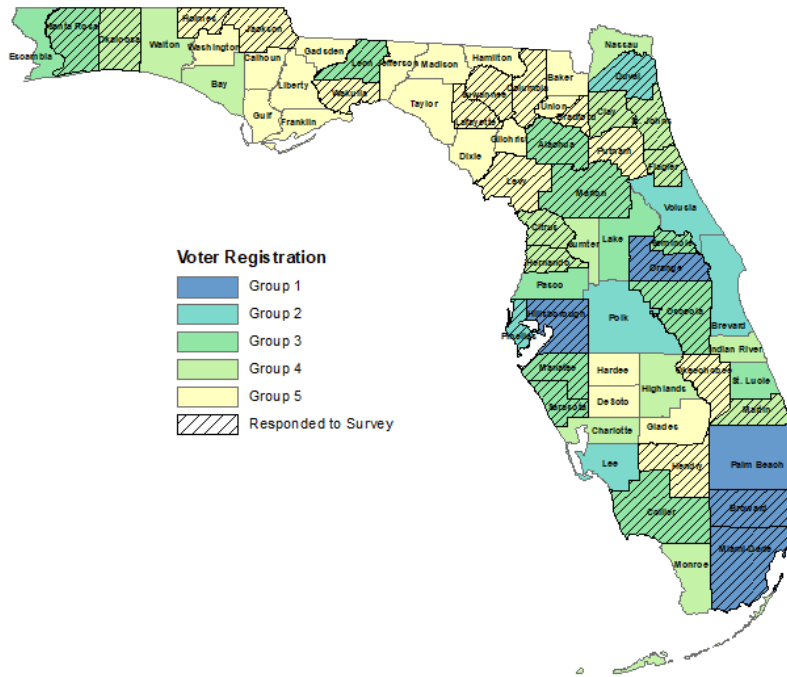
Group 3: The 13 counties of: Alachua, Collier, Escambia, Lake, Leon, Manatee, Marion, Osceola, Pasco, St. Johns, St. Lucie, Sarasota, and Seminole.

Group 4: The 15 counties of: Bay, Charlotte, Citrus, Clay, Flagler, Hernando, Highlands, Indian River, Martin, Monroe, Nassau, Okaloosa, Santa Rosa, Sumter, and Walton.

Group 5: The 28 counties of: Baker, Bradford, Calhoun, Columbia, DeSoto, Dixie, Franklin, Gadsden, Gilchrist, Glades, Gulf, Hamilton, Hardee, Hendry, Holmes, Jackson, Jefferson, Lafayette, Levy, Liberty, Madison, Okeechobee, Putnam, Suwannee, Taylor, Union, Wakulla, and Washington.

Using the cost figures of those counties that reported \$0 or greater than \$0, staff calculated an average cost for each group. The group averages are based only on those county survey respondents that provided cost figures greater than \$0 or indicated that costs would be \$0. The group averages exclude those counties that did not respond to the survey or indicated that costs were unknown. As previously mentioned, FIEC reasoned that the cost figures provided by Broward County were outliers and excluded them from the calculation of the Group 1 average cost.

⁵ Number of Active Registered Voters as of June 30, 2019: Florida Department of State, Division of Elections, "Voter Registration-By County and Party" available at <https://dos.myflorida.com/elections/data-statistics/voter-registration-statistics/voter-registration-monthly-reports/voter-registration-by-county-and-party/>, accessed July 31, 2019.



The calculation of each group’s average cost was then multiplied by the number of counties within that group in order to calculate an estimate of the group’s total cost. The total costs of each group were summed to determine the projected statewide costs to county governments as illustrated in the table below.

Estimated Statewide Costs by Fiscal Year						
Fiscal Year	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
	\$5,210,095	\$437,951	\$5,527,522	\$441,300	\$5,765,138	\$448,278

Furthermore, staff projected the statewide cost per registered voter by dividing the estimated statewide costs summarized above by a calculated projection of registered voters as summarized below.

Estimated Statewide Costs per Registered Voter by Fiscal Year						
Fiscal Year	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Number of Registered Voters	14,529,876	14,734,330	14,929,850	15,110,902	15,283,088	15,450,870
Costs per Registered Voter	\$0.36	\$0.03	\$0.37	\$0.03	\$0.38	\$0.03

The table below displays the anticipated costs per fiscal year by county, in addition to the summary calculations described above. There appears to be a wide variation in costs both within groups based on number of registered voters and among counties overall. No supervisors reported anticipated savings other than \$0 or unknown, therefore no savings analysis was conducted. Comments from the supervisors regarding the anticipated costs and/or savings are shown in Appendix A.

Proposed Constitutional Amendment for 2020 Ballot
All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet
Survey of County Supervisors of Elections, July - August 2019

Statewide Cost Extrapolation - County Groupings Based on the Number of Active Registered Voters

Fiscal Year	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Group 1: (5 Counties)						
Broward, Hillsborough, Miami-Dade, Orange and Palm Beach						
Hillsborough	\$0	\$0	\$0	\$0	\$0	\$0
Miami-Dade	\$678,773	\$0	\$678,773	\$0	\$678,773	\$0
Group 1 Average Costs	\$339,387	\$0	\$339,387	\$0	\$339,387	\$0
Group 1 Total Costs	\$1,696,933	\$0	\$1,696,933	\$0	\$1,696,933	\$0
Group 2: (6 Counties)						
Brevard, Duval, Lee, Pinellas, Polk and Volusia						
Duval	\$0	\$0	\$0	\$0	\$0	\$0
Pinellas	\$770,000	\$0	\$930,000	\$0	\$1,000,000	\$0
Group 2 Average Costs	\$385,000	\$0	\$465,000	\$0	\$500,000	\$0
Group 2 Total Costs	\$2,310,000	\$0	\$2,790,000	\$0	\$3,000,000	\$0
Group 3: (13 Counties)						
Alachua, Collier, Escambia, Lake, Leon, Manatee, Marion, Osceola, Pasco, St. Johns, St. Lucie, Sarasota and Seminole						
Alachua	\$0	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Collier	\$0	\$0	\$0	\$0	\$0	\$0
Leon	\$0	\$0	\$0	\$0	\$0	\$0
Manatee	\$7,000	\$0	\$7,500	\$0	\$8,000	\$0
Marion	\$0	\$0	\$0	\$0	\$0	\$0
Osceola	\$30,000	\$0	\$32,000	\$0	\$34,000	\$0
St. Johns	\$0	\$0	\$2,500	\$0	\$0	\$0
St. Lucie	\$125,000	\$0	\$125,000	\$0	\$125,000	\$0
Seminole	\$180,000	\$0	\$180,000	\$0	\$180,000	\$0
Group 3 Average Costs	\$38,000	\$333	\$38,889	\$333	\$38,889	\$333
Group 3 Total Costs	\$494,000	\$4,333	\$505,556	\$4,333	\$505,556	\$4,333
Group 4: (15 Counties)						
Bay, Charlotte, Citrus, Clay, Flagler, Hernando, Highlands, Indian River, Martin, Monroe, Nassau, Okaloosa, Santa Rosa, Sumter and Walton						
Citrus	\$88,670	\$0	\$42,420	\$0	\$42,420	\$0
Clay	\$15,000	\$15,390	\$15,789	\$16,199	\$16,620	\$17,052
Hernando	\$10,000	\$0	\$10,000	\$0	\$10,000	\$0
Martin	\$20,000	\$50,000	\$25,000	\$50,000	\$25,000	\$50,000
Group 4 Average Costs	\$33,418	\$16,348	\$23,302	\$16,550	\$23,510	\$16,763
Group 4 Total Costs	\$501,263	\$245,213	\$349,534	\$248,246	\$352,650	\$251,445
Group 5: (28 Counties)						
Baker, Bradford, Calhoun, Columbia, DeSoto, Dixie, Franklin, Gadsden, Gilchrist, Glades, Gulf, Hamilton, Hardee, Hendry, Holmes, Jackson, Jefferson, Lafayette, Levy, Liberty, Madison, Okeechobee, Putnam, Suwannee, Taylor, Union, Wakulla and Washington						
Bradford	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000
Lafayette	\$4,700	\$1,915	\$1,500	\$1,960	\$5,000	\$2,500
Levy	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Putnam	\$0	\$0	\$0	\$0	\$0	\$0
Group 5 Average Costs	\$7,425	\$6,729	\$6,625	\$6,740	\$7,500	\$6,875
Group 5 Total Costs	\$207,900	\$188,405	\$185,500	\$188,720	\$210,000	\$192,500
Statewide Projections						
Total Costs	\$5,210,095	\$437,951	\$5,527,522	\$441,300	\$5,765,138	\$448,278
Number of Registered Voters	14,529,876	14,734,330	14,929,850	15,110,902	15,283,088	15,450,870
Cost per Registered Voter	\$0.36	\$0.03	\$0.37	\$0.03	\$0.38	\$0.03

Notes:

- The group averages are based only on those county survey respondents that provided cost figures or indicated that costs would be \$0. The group averages exclude those counties that did not respond to the survey or indicated that costs were unknown. The cost figures provided by a single county were determined to be an outlier and were excluded from the average.
- For each year of the forecast period, the projected statewide cost per registered voter was calculated by dividing projected total statewide costs by the calculated projection of registered voters.

Data Source for County Groupings: Number of Active Registered Voters as of June 30, 2019: Florida Department of State, Division of Elections, "Voter Registration-By County and Party" available at <https://dos.myflorida.com/elections/data-statistics/voter-registration-statistics/voter-registration-monthly-reports/voter-registration-by-county-and-party/>, accessed July 31, 2019.

Economic Analysis

The Conference considered the impact the proposed amendment would have on campaign advertising, with the primary concerns being a possible shift in advertising from fall to summer, the overall volume of campaign advertising, and the resulting economic impacts. According to the Public Policy Institute of California, while there was no discernable shift in the timing of campaign advertising, there was an overall increase in such advertising after the amendment's passage. Reasons for this increase include single party elections which previously would have concluded with the primary instead continuing on to the general election, more candidates, and the need for candidates to advertise to more voters. However, there were other factors which also increased campaign advertising during this period. For instance, the 2012 Primary Election in California was both the first primary election to employ the top-two primary format and the first election after legislative districts were redrawn by a nonpartisan board rather than the state legislature. The new districts resulted in more competitive elections, with the average margin of victory for incumbents dropping from 39 points to 28 points.⁶ Logically, more competitive elections would yield more campaign advertising. In addition, campaign spending in general has been on an upward trend. Thus, it is impossible to know how much of the increased campaign advertising was the result of the switch to a top-two primary, redistricting to more competitive districts, or natural growth which would have occurred otherwise. Therefore, while the Conference acknowledged the potential for additional campaign advertising, there was no attempt to quantify this increase or examine the economic impacts from this increase.

Section 100.371, F.S., requires the Financial Impact Estimating Conference to estimate the impact on the economy of the proposed amendment. As such, the Conference has agreed upon the following guidelines to determine whether a proposed constitutional amendment needs an economic analysis. In this regard, no economic analysis is needed when all of the following are projected to occur:

- No or minimal changes to any state or local expenditures.
- No or minimal changes to any state or local revenues.
- No or minimal changes to the level of federal receipts.
- Based on economic theory, academic research, or the nature of the initiative, no or minimal changes are expected to any economic metrics. These include—but are not limited to—personal income, jobs, capital investment, costs of production, industry mix, or level of imports from or exports to other states or countries.

For these purposes, minimal means that the amount or effect is not large enough to be significant or affect a situation to a noticeable degree.

As stated previously, the proposed amendment will result in an increase in local expenditures; however, this change is expected to be below the threshold that would produce an economic impact. The proposed amendment will not result in any changes to state or local revenues. In addition, the proposed amendment will not change the level of federal funding via penalties, grants, level of apportionment, or any other federal funding mechanism. Lastly, there is no reasonable argument that this amendment impacts any of the economic metrics listed in the guideline above. Therefore, *All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet* would have no impact on the state and local economy in Florida.

Budget Analysis

According to the Department of State, there would be a nominal impact to the state budget resulting from passage of this amendment. This impact has not been quantified.

⁶ McGhee, Eric and Krimm, Daniel, Test-driving California's Election Reforms, Public Policy Institute of California, September 2012.

Appendix A - Proposed Constitutional Amendment for 2020 Ballot
All Voters Vote in Primary Elections for State Legislature, Governor, and Cabinet
FIEC Survey Comments from County Supervisors of Elections, July - August 2019⁷

Citrus County Supervisor of Elections

Ballot size for a primary election is a concern. Because all candidates for one race must be in one column with added languages and all parties this could create the largest ballot size in a primary election. This would be costly for ballots across the state and increase the mailing costs of VBM. A ballot size increase would increase the number of DS200 precinct scanners needed for early voting and Election Day. The cost to educate the voters on the changes could be significant. [CALCULATIONS OMITTED]

Clay County Supervisor of Elections

Currently, Clay County has approximately 39,000 voters who are not registered in one of the two major parties and would typically not be receiving a ballot in a primary election unless there was a nonpartisan contest. However, this change in effect does away with the Universal Primary Contest and will present a number of adverse changes that ultimately have a fiscal impact. 1.) Potentially 39,000 additional citizens who would now be eligible voters, thus requiring addition monies for ballot production, mailing cost, and staffing. 2.) Could result in the potential for additional contest which would normally be settled in the Primary, now going to the already congested General Election Ballot and could exponentially increase the number of sheets of a ballot given the many design (Inability to span columns, minimum font and spacing) restraints provided in 1S-2.032 See Uniform Ballot Design Rule. I see no savings.

Collier County Supervisor of Elections

Collier generally has something on the ballot for all voters during primaries.

Columbia County Supervisor of Elections

Additional costs will be based on number of candidates qualifying in the races covered by the amendment. Large number of candidates will cause increased ballot size (increased printing costs, mailing and programming of ballot). Columbia County historically has an 11 in. ballot at the Primary (no larger than 14"). Large number of candidates may increase the size/weight to 18", potentially two pages. Inflation will be a factor in the cost of producing future ballots. Advertising/Voter Education would be expensive (mail outs to all registered voters, newspaper/radio/tv ads, etc.) to explain the change to the voters.

Flagler County Supervisor of Elections

"All candidates qualifying for an election to the office shall be placed on the same ballot for the primary election, regardless of any candidate's political party affiliation or lack of same." Based on the number of candidates qualified to run for State office in 2018, I believe this change would result in a large number of candidates for State offices to appear on a Primary Election ballot. Currently NPA candidates do not have a Primary and appear on the General Election ballot, along with unopposed minor party candidates. If all candidates were listed in the Primary, the size of the ballot would be increased and I would expect additional ballot pages. Although the party styles would be eliminated ("All electors registered to vote...shall be allowed to vote in the primary for said office...regardless of the voters or candidate's...party"), the increased ballot page(s) themselves will have a significant cost impact for mass production for early voting and Election Day, increased postage cost for mailing Vote-By-Mail ballots and finally, the compilation of results. The estimated cost is currently unknown and would be based upon the number of candidates, length of ballot, number of additional pages and vendor costs for production and mailing at the time of the election in 2024.

⁷ Technical edits were made for clarification.

Historically, the Primary Election ballot has been one page in Flagler County. The cost impact provided is based upon the number of candidates qualified in the most recent past election. I would not expect the number of candidates to decrease. However, if our ballot remained one page in the Primary, the cost of ballot production would decrease due to the elimination of party styles.

Hendry County Supervisor of Elections

Additional costs would be minimal for ink and race programming. Additional cost would be if the additional races caused us to have another ballot page or additional party ballot which is unpredictable.

Hernando County Supervisor of Elections

Voter education and a lengthier ballot will increase election costs. This would cause more confusion for voters. Very confusing for voters and for an election worker to explain to them.

Holmes County Supervisor of Elections

Additional costs or savings cannot be determined.

Jackson County Supervisor of Elections

Additional costs or savings cannot be determined.

Lafayette County Supervisor of Elections

These numbers do not reflect any growth in the county – this is reflecting current registration numbers which are sure to increase over the next decade. These numbers are likely best to moderate case scenarios, not worst case which would be significantly higher. I anticipate an enormous impact on my budget as we are a small county with limited financial resources.

Leon County Supervisor of Elections

Is anticipated that there will be a slight cost savings, or a neutral financial impact.

Levy County Supervisor of Elections

Voter education and a lengthier ballot will cost approximately \$10,000 extra per election.

Manatee County Supervisor of Elections

The additional costs are impossible to precisely determine because they will depend on two factors that will not be known until the time of the election. Those two factors are: How many candidates will there be on one ballot and will there be increased voter participation. The Governor's race historically has several candidates from each party, and I could see this increasing even more. If we use the 2018 election as a guide there were 8 Rep, 7 Dem, and 3 NPA candidates for Governor. One race with 18 candidates would have extended our ballot from 11" to 14". One desire behind this amendment is to generate more participation with NPA voters, if this happens then there will be a direct cost to the additional voters. In short, the estimated increases above are based on an increase in ballot length and a voter increase of 10 percent during all Primary elections adjusted for population growth over time.

Marion County Supervisor of Elections

I don't believe it will have a noticeable financial impact.

Okaloosa County Supervisor of Elections

Costs will vary based on the number of candidates, and the length of ballot required. Likewise savings are variable depending on those factors. If length causes a second ballot card in a primary, costs could essentially double (approximately \$50,000). Costs for voter education would be higher at first but would expect them to diminish over time.

Okeechobee County Supervisor of Elections

The additional cost is dependent on the number of pages for all races with candidates that would be printed on the ballot. Plus, if a nonpartisan ballot was not required for an election, this would create one. At this time, a cost analysis cannot be provided as there are multiple variables to consider.

Orange County Supervisor of Elections

Orange County uses a 8 ½" x 17" ballot and usually print on one side of a primary ballot. If we have to print on the back side of a primary ballot, we estimate the additional printing cost at less than 10 cents per ballot.

St. Johns County Supervisor of Elections

This amendment may increase voter turnout especially for voters with no party affiliation who do not vote in Primary elections. An increase in voter turnout in primaries may slightly increase the cost for printing and mailing more ballots. If you look at the Governor candidates that qualified in 2018 there were a total of 27. 8 REP, 7 DEM, 5 NPA & Minor party candidates, and 7 write in candidates. Using this one race as an example, we could have some very long races on the primary ballot. However, the advantage is the shorter General election ballot with only 2 candidates moving forward in the race. Using this example instead of 8 candidates there would only be 2. My Question – how would it affect write-in candidates? Historically State legislative races locally do not have much competition, so the impact in St. Johns County would be seen mainly during the years the Governor and Cabinet members are scheduled for election.

St. Lucie County Supervisor of Elections

Would impact primary election budgets only.

Santa Rosa County Supervisor of Elections

Costs of ballot printing and mailing could double. Programming costs are also unknown.

Suwannee County Supervisor of Elections

There is no way to know the cost until you know how many candidates are on the ballot. Costs will increase because you will now be preparing ballots for Minor and No Party Voters in those particular races while still preparing Party race ballots for other races on the ballot. Any mailings will incur more costs. Because the number of candidates on the ballot will obviously be more, it will cause your ballot to be longer, possibly at least one additional page, if not more for the larger counties.

Wakulla County Supervisor of Elections

Overall, I feel no additional cost ... only a trade-off from the General Election to Primary Election.