

# The eBook

Your guide to  
effective, efficient  
election administration

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## Overview

Administering an election can be a daunting task if you haven't done it before. The goal of the eBook is to simplify and streamline the process by offering you a collection of checklists, points, tips and hints that help you complete your election effectively and efficiently.

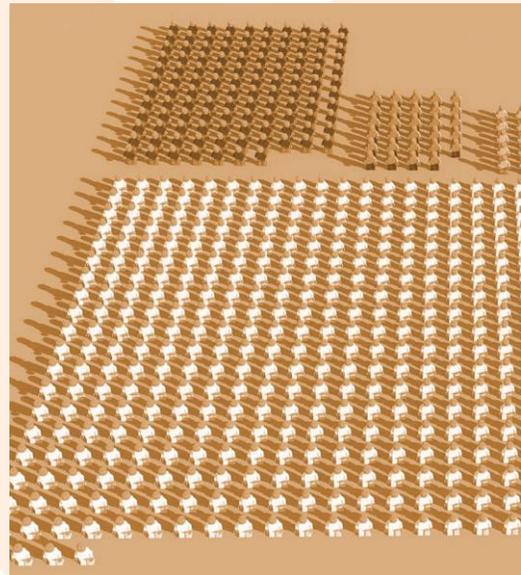
The eBook has detailed sections which explain all the important election details for a new administrator. To get you started, here are some tips to point you in the right direction for running the perfect election:

- ✔ Ensure that you are aware of state and federal legislation pertinent to your organization for specific election requirements. Depending on the state, some duties pertaining to election oversight are also included in Civil Code legislation.
- ✔ Review your organization's bylaws for voting procedures and methods. For example, confirm that electronic voting is allowed within your bylaws.
- ✔ If you are a local branch or chapter within a larger or national group, seek guidance and assistance from your governing organization, or check with other groups in different regions.
- ✔ Market the election using multiple notice methods, well before the election date. Broadcast the voting start date and time along with the election end date and time. Share all the election details including voting period, voting location, and candidate details.
- ✔ Ensure voters have all the information they need to make an informed choice by sharing candidate profiles, bylaw information, or background information.
- ✔ Create a schedule that includes a voting period with a sufficient amount of time for voters to carefully consider their choices and respond by casting their vote.
- ✔ Identify what constitutes a "winner." It doesn't just come down to who gets the most votes – consider the number of votes cast to ensure your election is valid for quorum. For example, if your voter population is 100 people, but the total number of votes you receive from your voters is 3, 3/100 doesn't make for a valid election, even if all the votes went to one candidate
- ✔ Decide how voters will vote - online voting only, mailed paper ballots, onsite voting, or a combination of voting methods.

## Voting Methods

Understanding the different voting processes ensures that you pick a method that best suits your organization. The methods are as follows:

- ✔ **Online** - encompasses all forms of absentee voting by electronic means. There is a definite generational bias; younger people prefer it, whereas it can be uncomfortable for elderly people who lack computer literacy. It is a very cost-effective method, as emails and text messages are relatively inexpensive. Voting results are immediately calculated and available.
- ✔ **Mailed** - where printed ballots are sent to the voters' work or home address. This is more convenient to the voter than onsite voting, and addresses can be verified against the member database. However, postage is costly, and not only is it an effort to generate the mail, it is effort and a cost to the voter. Additionally, if ballots are received after the deadline, there can be issues with whether to accept these ballots.
- ✔ **Onsite** - where voters attend a polling station, are verified, and cast their vote. This is a well-understood method, and is well-used, especially by elderly voters. However, for voters that are mobility-challenged, it can create issues. Multi-day onsite elections are costly, as you have to man the polling stations. Errors can occur during tabulation of paper ballots due to illegibility and human error.



## Election Administration

- ✔ Ensure the person overseeing the election (the administrator or scrutineer) is an objective party not involved directly in the process. This person should be non-partisan, well-respected in the organization, and keen to boost turnout; a champion administrator leads to a champion election! Past board members, independent accountants, and parliamentarians all make great administrators. Administrator cost plays a role in your choice, so be sure to ask for a fee estimate if hiring an administrator, to ensure the cost fits in the election budget.
- ✔ Review the election process with the current board and, if practical, your membership. Consensus about the election process precludes election challenges and other issues that can invalidate your election.
- ✔ Consistency is important - identify individuals that can oversee multiple elections (eg. a 3-year term). The first year they are learning, the second year they have time to fix the first-year learnings and in the third year, they can turn over the process to a new person.
- ✔ Candidates who are running should **not** be allowed to be the administrator – not only can they influence an election, but they will be perceived as having the ability to influence the election.
- ✔ Ensure that the administrator has availability to answer voter questions. There is a time commitment, and good elections take some time to manage.
- ✔ Ensure that the results of the election are inaccessible by the administrator until after the election ends. This helps you maintain election integrity by preventing the administrator from associating voters with their choices, avoids the ability to tamper with the voters and election winners and, most importantly, prevents the perception that tampering has occurred.

If you are the person taking on the election administration role, it is very important that you think about the responsibilities that you are about to undertake, and whether you have the adequate time to carry out your duties. It always takes more time than you think, but a successfully managed election is very rewarding and worth the effort!

### Legalities – Items to Consider

If your organization is incorporated or registered, election requirements may be mandated. If you don't abide by these requirements, your election may be declared invalid and your board or executive can be held accountable. Here are some items to consider:

- ✓ Many states and provinces have specific election guidelines within their overall legislation for your organization, including associations, homeowner associations, non-profits, NGO's and charities. For example, there are specific rules for California HOA elections. It is paramount that you review the legislation each year prior to starting the election. An internet search will identify any legislative updates.
- ✓ Depending on the state, some duties pertaining to election oversight are also included in Civil Code; for example, California.
- ✓ Organizational Bylaws are also important. Bylaws may include election procedures, timing, voter eligibility criteria, candidate eligibility, procedure for election challenges, and/or third-party oversight.
- ✓ Bylaw and legislation review is typically done by a board, executive, committee, or an election administrator (or combination of all of these).
- ✓ In preparation for a change in your election process, you may have to call a special meeting to change your bylaws (for example, to allow online voting).
- ✓ Election timing - deciding when an election can be called is typically identified within the bylaws. Common frequency is annually or biannually, but elections can also be called by special resolution.
- ✓ Candidate eligibility - requirements vary by organization and are usually defined within the bylaws. If not, then consider adding bylaw requirements, or create a policy that allows flexibility without detracting from the credibility of your organization. Identify the minimum term of service for eligibility, and other qualifications needed. Nomination criteria also defines a candidate's eligibility. For example, a candidate must be nominated by 10 people before they appear on the ballot.
- ✓ Voter eligibility - what constitutes membership and capability to vote in the election. This is typically written in bylaws. Usually, it's membership in an organization, but there may be a specific definition as

to a member. In some cases, the member must have their "membership in good standing." Understanding what constitutes a member's eligibility helps you include and exclude members in your voting list. The rules regarding a member's eligibility to participate in an election are typically addressed in the election announcement. Specific items include:

- ✓ Criteria for member voting eligibility, including the definition of a member in good standing.
- ✓ Are members who join the organization in the middle of the election eligible to vote? Is there a minimum term length that the member must have served before being eligible?
- ✓ Are results for new members weighted differently?
- ✓ Do different members have different voting power? For example, HOAs sometimes use weighted votes based on square footage as opposed to one vote per home.
- ✓ A voting schedule that includes defined notice and election duration.

Choosing how the winners will be decided:

- ✓ Voting method – to format ballots and calculate a winner, are you using plurality (very common), preferential, cumulative or approval methods? If you don't know what these mean, check Wikipedia - they have great definitions!
- ✓ How many votes constitutes a "win"?
- ✓ Define your quorum - the minimum number of voters that must vote.
- ✓ Can a proxy occur – can a voter allow someone to vote on their behalf? These rules, if applicable, should be rigorously outlined. Things to consider include:
  - ✓ Rules to permit the transfer
  - ✓ Timing for assignment of the vote
  - ✓ What is the transfer deadline (return date)?

“ Understanding the different voting processes ensures that you pick a method that best suits your organization. ”

## Election Scheduling

As with any project, a well thought out plan increases the likelihood of success. When planning the election schedule, here are some items to consider and their associated tasks:

- ✓ Align your schedule with your bylaw requirements, your parent organization, and any state or federal legislation. An election can be declared invalid if deadlines and schedules are not met.
- ✓ Ensure administrators, candidates and voters are aware of timelines. Timelines to be aware of include candidate nomination deadlines, when polls close, when mailed ballots must be postmarked by or received by, when ballots will be counted, and when results will be shared.
- ✓ Schedule announcements to meet magazine or newspaper deadlines.
- ✓ Do as much as you can, as early as you can. This will leave you time for the last-minute issues. Slack time is okay!

### The Perfect Election Time and Duration

Check your bylaws – they're the place to start for election timeframes. If they do not indicate your timeframes, or you want to select a perfect duration, here are some ideas:

In general, elections and the voting period should be short. If a large, federal election occurs in a single day, yours can too! Of course, a federal election has a large voter awareness budget and media coverage to get a country's worth of voters out to the polls one day.

But, if the voting period is too short, turnout can be low. With a single-day election, voters who have other activities to attend to will not vote. A multi-day election allows you to remind voters to vote, and gives voters a chance to vote at a time convenient for them. However, for any election longer than a week, you run the risk of voter procrastination and forgetfulness. A shorter-term deadline is a powerful motivator to drive voter action! Plus: the shorter the election, the lower the cost.

For smaller groups, a rule of thumb is 8 to 21 days if it's an online-only election. For mailed ballots, the duration can be a minimum of 2 weeks but no longer than a month. You need more time if you are mailing ballots – minimum 2 weeks, typically 30 days. To choose the duration, consider:

#### Size of Voter Base - Membership

The larger the voter base, the more time you will need.

### Seasons and Vacation Considerations

Christmas and summer months require more time, as voters are busy with family. Ensure the voting time crosses weeks as people typically vacation Monday to Sunday. Allow for two weeks to vote if your voters travel for work.

### Items Being Voted on

For an in-person bylaw vote, it may be minutes. For an onsite election, limit voting time to a single evening on a day that is accessible and likely attended. Tuesday, Wednesday and Thursday tend to have better participation. Or, schedule the vote as part of your regular meeting time.

### Voter Demographics

Voter age impacts the time of day best for voting. Seniors tend to favor daytime. Adults prefer early evenings; Tuesday and Wednesday are best. Students are available after noon.

### Voting Methods

If you can tally votes electronically, you can shorten the time period. Mailed ballots require more time; at least 2 weeks if local, 4 weeks if national, and 2 months if international.

### Legalities, Bylaws State and Federal Legislation

Obtain your organization's bylaw requirements, and those of your governing body, if you are a chapter of a larger organization. For example, if you are a Rotary chapter, or union local, contact your national executive body.

### Multi-Country Dispersion

If voters are internationally spread out, allow for longer time periods, especially if using a postal service.

### Voter Notification

By sending notices and sharing the voting period prior to the election, you can substantially shorten the voting period.

## Election Dates

### Candidate Solicitation/Call for Nominations

Typically completed 30-45 days before ballots are shared

### Ballot Sharing Date

When are ballots mailed, published or emailed.

Minimum mailing is 30 days before the election ends.

### Ballot receipt

When the ballots must be received; a number of days before they are counted; commonly 5, 7, 10 and 14 days.

### Ballot counting date

Typically, held in conjunction with the annual meeting.

### Results sharing

Normally results are published as soon as counted, to a maximum of 15 days after voting ends.

## Improving Election Turnout

How to get more voters to vote, and voting rules of thumb:

- ✔ Smaller organizations tend to have higher percentage turnouts than larger (i.e. if your organization is under 200 members, more people are likely to vote).
- ✔ Offer a strong reason to vote. Is your mandate strong? Do people care? If your voters aren't engaged in the organization, they won't vote. When members are familiar with the candidates, voters will vote. If the organization has a strong mandate and sense of purpose, voters will vote.
- ✔ Market, market, market. The more ways you notify people, the less likely you will get the excuse, "I didn't know it was happening." An effective notice strategy goes a long way to solving this issue.

## Election Issues

Hope for the best and plan for the worst. Here is a listing of potential election pitfalls and questions that you should have answers to:

- ✔ Election administrator cannot oversee the election due to illness or emergencies - have you planned for a backup administrator?
- ✔ Candidates who drop out mid-election - how will you manage the ballot and the results? Will you allow substitute candidates?
- ✔ What will you do about any voters who don't receive their notifications, or were accidentally left off the voter list?
- ✔ Errors with the candidate information or ballot details - how will you inform your voters?
- ✔ Election challenges from disgruntled candidates - what procedure have you defined to deal with requests for audits, recounts, or election verification?
- ✔ Closely contested elections - what is the threshold for re-running an election?
- ✔ Unanticipated issues - who is the key decision maker and what is the process for resolving issues? Who needs to be informed? What invalidates an election?

# Minimizing Election Cost

## Cost Planning

Cost planning is an important part of any election. For student government, associations, or unions, the organization is funded by your members, and those dollars are hard to come by. Budgetary planning can go a long way to achieving a successful election.

- ✔ Review, review, review - errors cost money and time. For example, an incorrectly formatted paper ballot results in reprinting costs, or postage fees for resending ballots.
- ✔ Plan for exceptions - what will it cost you if unexpected issues arise? Candidates can, and will, drop out. Volunteers will not show up, or you may have more than you anticipate. It also helps you manage expectations of your members - it's better to be below budget than to overspend!
- ✔ Shop around - have you sent requests to at least three printing vendors or postage houses?
- ✔ If you are using both paper and electronic voting methods, distribute printed ballots after electronic ballots. If you delay the printing and mailing of your ballots for a week, you won't have to send ballots to all the voters that voted electronically.
- ✔ Email is cheaper than phone is cheaper than post.

## Election Budgeting

Budget for all the election stages, not just the day of the election expenses. A budget should include considerations for:

- ✔ Online fees
- ✔ Professional scrutineers
- ✔ Staff time
- ✔ Election advertising - website costs, email blasts, and/or phone blasts
- ✔ Election collateral - brochures, buttons, stickers, paper ballots
- ✔ Marketing and advertising material costs, e.g. flyers, brochures, voting reminders, buttons, stickers, etc. Include third-party printing costs. Don't forget about budgeting for design and preparation.
- ✔ Postage for notices, mailed ballots, and results mailers.
- ✔ Staff time and costs. Hourly rate multiplied by the number of expected hours for all stages of the election. Don't forget about time spent answering voter questions!
- ✔ Third party provider costs - printers, professional scrutineers, mail houses, voting venue
- ✔ Onsite voting expenses: venue, booths, ballot boxes, computers, mobile ballot capture device rental, paper and pens, food and beverage for members and volunteers, staff travel costs.



“ Budgetary planning can go a long way to achieving a successful election ”

# Voter List Preparation Tips

Gathering and reviewing your voter list is like managing the membership of your organization. If you don't manage it properly, your election notifications and announcements will not be received and your turnout will be negatively impacted.

- ✔ Ensure that you have a unique identifier for your voters. This makes it easy to manage votes and provides a common way for all those involved with the election to communicate about voters.
- ✔ Ask for contact updates as part of your election.
- ✔ Send a notice to have voters register for the election, to gather and update voter information. An email or text message is much more cost-effective than mailed voter verification.
- ✔ Ensure that all voters are valid. Have any organization members left your organization? If so, sending them a ballot will impact the election integrity, and could upset that person as well.
- ✔ Have you planned for members to opt out during the election? This is a requirement for electronic communication (email), and a great way to update your member lists for organizations that do not require a payment to join.
- ✔ Plan for members that join your organization mid-election and define whether you will let them vote. How will you tally their ballots and how is the voter list segregated for these new voters?
- ✔ Confirm whether candidates are eligible to vote
- ✔ Identify if the entire voter list can vote for every position and question on the ballot. If not, segregate your voter list into groups, 1 group per voter to make it easy to allow them to vote for specific ballot items.

## Common Voter List Elements

- ✔ Voter Name
- ✔ Membership ID
- ✔ Email address
- ✔ Phone number



# Election Notice, Announcements, and Marketing

## Announcement Strategy

An effective announcement strategy can dramatically increase voter turnout.

- ✔ Email your voters. You can send direct notices via email. Also think about adding a message at the bottom of your email (an email signature) to every email that is sent by you and administrative members of your organization.
- ✔ Create a Facebook event or group
- ✔ Twitter posts to a subgroup
- ✔ Other social media - Google Plus, LinkedIn
- ✔ Post a notice on your website
- ✔ Post paper announcements, such as flyers, in your organization's building.
- ✔ Newspaper Magazine or TV Announcements - there are public service sections to most media outlets that allow community members to share their news. And best of all, it's free! A trade journal is an awesome place to go to. Press releases are also great if they are to-the-point and informative.
- ✔ Mail - postcards are an inexpensive way to announce an election to your members directly. Or, add a notification to other materials you mail: invoices, statements, receipts, membership renewals, newsletters, e-newsletters, etc.
- ✔ Multiple reminders - once isn't enough. Just like there are many methods of sharing the message, there should be many attempts by you to share that message. Ensure that you share it more than once, with ample time to share it.
- ✔ Phone - in the day and age of smartphones, a phone number is a highly effective channel to announce an election to voters via text message or phone message.
- ✔ Invoices, statements or payment requests - for member based organizations that charge dues, include a reminder that an election is upcoming. It also helps with renewal, as you can link the payment deadline to the ability to vote

## Improving Election Turnout

How to get more voters to vote and voting rules of thumb:

- ✔ Smaller organizations tend to have higher percentage turnouts than larger. E.g. if your organization is under 200 members, more people will vote.
- ✔ Offer a strong reason to vote. Is your mandate strong? Do people care? If your voters aren't engaged in the organization, they are more likely not to vote. When members are familiar with the candidates, voters will vote. If the organization has a strong mandate and sense of purpose, voters will vote.

## Email Notices

Easily the most common method to notify voters about an election, and due to the widespread familiarity of emails, it is one of the simplest methods for both voters and administrators — hence why it is so common!

Email notices only go wrong when emails do not get received. We have all been the victim of not receiving an email, and it can be very frustrating for everyone involved, especially if there is no obvious reason why it was not received. Unfortunately, the ultimate call on whether an email will be received is up to the recipient's email server, but there are some things that you can do with your email content to help increase the likelihood that an email makes it to its destination inbox.

There are no set rules to follow to make things easy, but there are widely-accepted dos and don'ts of sending emails legitimately.

Something important to note is that **people mark emails as spam**, not just spam filters. A lot of the things that spam filters find offensive, humans do as well — particularly with regards to content, as most humans won't understand technical offenses/don't see them.

The following list has some things to **avoid** when composing email content, in order to make it fly under the radar of spam filters. It is important to note that inclusion of any of the following items in your notice may not necessarily make it spam, but simply make it more likely that it will be considered as such.

Red flags in email content for spam filters include:

- ✔ **Promotional or commercial language** - the words, “buy,” “free,” “sell,” etc. all are common to spammy sales emails.
- ✔ **Languages that the recipient doesn’t regularly receive** - spam filters “learn” what is regular for a recipient to receive, based off previous successfully received emails. If an English-speaking recipient is sent an email that is entirely in Chinese characters, the spam filter may decide that the recipient won’t be able to read it anyway. If they can’t read it, it is no use to them, and would inherently be a junk email.
- ✔ **Exclamation points** - highly common to spammy sales emails. Never use one in a subject line. Never send in punctuation to do a word’s job.
- ✔ **SCREAMING AT YOUR RECIPIENTS** - DON’T USE ALL CAPS, PARTICULARLY IN THE SUBJECT LINE. THIS IS LIKE GETTING PUNCTUATION TO DO A WORD’S JOB, EXCEPT MUCH MORE AGGRESSIVE.
- ✔ **Spelling errors** - not only do spelling errors trigger spam filters, they really offend the recipient. So, if the spelling error doesn’t trigger the spam filter, it may trigger the human recipient into marking you as spam, which is no better.
- ✔ **Links** - links themselves are not necessarily a problem, but they will be investigated by spam filters. There are some rules to follow with the links:
  - ✔ Do NOT include links with domains that have poor reputations/are blacklisted; you become guilty by association.
  - ✔ Do NOT use abbreviated versions of a link. For example, in our printed and postal notices, our access link is [ebv.io](http://ebv.io). On our emails, it is <https://electionbuddy.com/ballot>. Spam filters want to see a full path with an obvious domain.
  - ✔ Spam filters DO like seeing links that have the same domain as the sending email address. Sending a link that does not match the email address’ domain is not necessarily going to skewer you, but it may be a good idea to run your email, with the link, through a spam score checker to see if the link causes a problem.

## ✔ Election Announcement

### “Things to Include” Checklist

- ✔ Start date and time of the election
- ✔ Voting period - how long voters have to cast ballots and vote (AKA the election end date)
- ✔ Call for nominations - identify the board responsibilities, so members can decide if they want to become candidates.
- ✔ Voting Locations - is the vote being held online, at a polling station, or during the annual general meeting? Provide directions to the room instead of just an address – voters can easily get lost within a building.
- ✔ Identify the administrator - the person overseeing the election. This person should be objective, well-respected in the organization, and keen to boost turnout. A champion administrator leads to a champion election! Past board members, independent accountants, and parliamentarians all make great administrators. Cost can play a role in your choice.
- ✔ Voter eligibility - what constitutes membership and capability to vote in the election. This is typically written in bylaws. Specific items include:
  - ✔ What criteria must a member have to vote (e.g. what is the definition of a member in good standing)?
  - ✔ Identifying whether members who join mid-election are eligible to vote
  - ✔ Are results for new members weighted differently?
  - ✔ Do different members have different voting power (weighted votes)?
  - ✔ How do eligible voters receive their ballots?
- ✔ How will the winners be decided?
  - ✔ The voting method
  - ✔ The number of votes required to win
  - ✔ Quorum - the minimum number of voters that must vote to make the election valid
- ✔ Can a proxy occur - is one voter allowed to transfer their vote? Rules outlined include:

- ✔ The circumstances that permit the transfer
- ✔ The timing for assignment of the vote
- ✔ The deadline for submitting the proxy
- ✔ Details needed for a valid proxy (signature, phone number, approval)
- ✔ Define what constitutes a successful, and a spoiled, ballot
- ✔ The date and location of the onsite meeting (if applicable)
- ✔ What is the tally (counting) process? Confirm that the ballots can be scrutinized, counted, and confirmed in an open meeting.
- ✔ Candidate Interviews and Bios – what information is relevant to include?
- ✔ Send multiple announcements by multiple methods using a cross channel strategy (e.g. email, mail, posting on your website, text message, mailed announcements, phone messages, Facebook, twitter)
- ✔ Remind voters to vote!
- ✔ If voting online or electronically, include a sample video of how to vote!

## Nominations

### **AKA Candidate Solicitation Notice**

- ✔ Identify the board responsibilities, so members can decide if they want to become candidates
- ✔ Call for nominations - in California, this is referred to as a candidate solicitation notice.
- ✔ Ensure that candidates submit their statements at the same time, and don't allow for candidates to alter their statements after submission. You can create an advantage for a candidate by allowing them to alter their biography or platform after they see their opponents' information.

## Candidate and Question Details

Here are some suggestions to ensure your voters have the right information presented to allow them to make an informed choice:

### Create an Outline

Use bullets "\*", dashes "-", or numbers (1.) for individual points to make the profile information easy to visually review.

### Shorter is Better

People don't like to read a lot, but people tend to like to talk about themselves. So, give limits on the number of characters a candidate has for their candidate biography.

### Bylaw Syntax

Strikethroughs for removal of terms and bolding for adding terms are a great way to identify bylaw edits.

### Break Long Profiles into Sections

For long profiles, divide the profile into sections. Use capitals for sections, e.g. EDUCATIONAL HISTORY. Bolding for sections works well, too! But, if candidate profiles are sent out via email, certain email programs will strip all formatting.

### Include the RIGHT Information for Your Candidates

While it is dependent on the kind of election you are doing, here are some typical items: education, experience, values, reasons to vote for the candidate, principles, policies, mandate, summary sentence— anything that gives your voters a RELEVANT reason to vote should be included.

### Ensure Each Candidate Has Reviewed their Profile

Provide a format to allow candidates to be compared to each other (include link to sample format). Changing a profile mid-election can reduce the election integrity, as you may change information that would impact a voter's decision to vote for the candidate. Keeping the profiles equal means all the voters vote on the same information, which creates a fair election.

Ensure the profile is reviewed by the election administrator and designates. Falsified statements or errors can damage the integrity of the election and the organization.

## Candidate Profile Items

- ✔ First and last name
- ✔ Title (e.g. Dr. or professional designations - optional)
- ✔ A photo, or (if using online voting) a short video (1-2 minutes maximum)
- ✔ Years of service or membership in the organization
- ✔ Experience that relates to the position
- ✔ Future goals for the organization, or their plan to service the position. This can include election promises.
- ✔ Candidate statement - the summary of the why the candidate is the best person to serve in the position
- ✔ Candidate contact details (email address, phone)
- ✔ Additional candidate references or information. (website, Facebook or twitter profiles, LinkedIn)
- ✔ Date of birth
- ✔ Marital status

# Ballot Design Tips

Think of the ballot like reading a newspaper. The right layout and information gives your voters better information, and saves you from being asked a lot of questions.

### **Position or Question Titles Should be Concise**

“Bylaw 12 Amendment” is better than the full bylaw details in the title. “President” is simple and to the point. If you need to explain details, add it underneath the title.

### **Provide clear and concise voting instructions**

How many candidates is the voter choosing? 1? 2 of 3?

If you are including candidate bios on the ballot, a summary paragraph keeps it legible and concise.

### **Use Simple Language**

Avoid wordy statements for details and candidate biographies. People like to talk more about themselves than what most want to read about them.

### **Random ballots**

Each voter should be presented with a ballot that has the order of candidates randomized, as opposed to alphabetized. For example, for a ballot with 1 position and 3 candidates, A, B and C, the order of the candidates on the ballot for the first voter would be A C B, then B C A, etc. This removes the “Ballot Order Effect” on voting results, where the first candidate is more likely to be selected than the middle or lower-ordered candidates.

### **Write-ins**

Include the right amount of write-ins. For example, if you allow write-ins on a ballot that has 3 vacancies open for a position, you should allow 3 open areas for write-ins.

### **Abstains**

If you are looking to understand what your voting population is thinking about candidates overall, or if you have only one candidate, ensure you include the option to not vote on a position or question. This ensures that you have a democratic process, and helps support an assertion that quorum was reached.

### **Less Text is More**

If you have a significant number of candidates or questions, group them into voting choices. For example, group candidates into one section, and questions into another.

### **Have Your Most Important Question or Position First**

Typically, candidates are chosen before questions are answered. But, if the most important item being voted on is a referendum question, put it first.

### **One Font Only**

Mixing and matching fonts makes it more difficult for the reader to understand the message.

### **Minimize the Font Styles**

Plain and bold text is a great place to start. For online ballots, avoid underlining, as it appears that the text links to a website - you don't want voters being frustrated with trying to click on something that doesn't produce an action.



### **Minimize the Number of Font Styles**

Plain and bold text is a great place to start. For online ballots, avoid underlining, as it appears that the text links to a website - you don't want voters being frustrated with trying to click on something that doesn't produce an action.

### **Whitespace is Your Friend**

More information on a ballot makes it appear cluttered. The appropriate use of blank space to separate sections, candidates, positions, and details makes it easier for voters to readily understand the choices they are making.

### **Keep Voting Choices Short**

"I approve" or "I reject", or "For" or "Against", "Approve" or "Reject", or the candidate names.

### **Test the Process**

If you have implemented the above recommendations, see if it works by having a small subset of people, who are not voting, test the process. The rule of 3 is helpful. Have 5 people test and see what issues they have, fix the issues, and then test with 3 more until you get a process where no questions are asked.

# Election Day

## Onsite Meetings

Every organization has their own unique needs and bylaws, and the voting process is customized to each situation. However, there are general processes and procedures that apply to most onsite elections:

### Plan the Meeting

Start planning several weeks in advance. Learn the venue's floor plan so you can plan for crowd control, member registration location, and voting booth placement; each detail is important to ensure every member can vote, and keeps the election on schedule. In planning, select your onsite election vendor by evaluating experience, testimonials and references. Ballots and the voting process should be safeguarded to keep the voting choices secret.

### Update Staff Members and Volunteers

Once the meeting plan is determined, all the staff members and any volunteers should be updated with all voting procedures and plans. If you are using an election vendor, then the vendor should also be onsite prior to the event to set up and test any necessary equipment.

### Common Voter Questions

Ensure that you have answers for common questions by sharing information on signage, or using greeters. Information to share includes: seating instructions, voting process and other scrutineer duties, ballot inspection, tallying procedures, and how to identify unusual activities or fraudulent voting practices.

### Send Meeting Notices

Send annual meeting notices to all the members. If you are using an online election platform or hybrid election platform, send email notices to all the voters and, if required by your bylaws, send paper ballots to all the voters.

### Plan for Absentee and In Person Voting

On the annual meeting day, any members who have not voted online or by mail can bring in their ballots or can cast an "onsite ballot", usually determined by your organization's bylaws or governing articles. Distinguish between members who have voted before the annual meeting and members who are voting at the meeting, so as to prevent members from submitting more than one vote. To ensure a voter submits a ballot only once, create ballots of different size, color, and/or layout, or use online election software which restricts voters from submitting multiple ballots.

## Voting Process

Verify ballot process - identify spoiled ballot criteria. Examples include those that do not include a signature, or do not follow other established election protocols, like:

-  A ballot with no mark or marking more number of candidates than allowed.
-  A ballot marked so the voter could be identified.
-  A ballot that does not clearly reflect the choice of the voter.
-  A ballot improperly marked (marked outside the circle or using a wrong symbol for marking etc.).

It is vital to know and communicate the procedures in place for any questionable ballots!

## Announce the Results

Once the meeting is completed, count all the ballots submitted during the meeting and the ballots submitted online. A certified report with the election results should be generated so your organization can make it official.

## Polling Stations

Polling stations are used when onsite voting is the only order of business conducted; their primary purpose is to allow voters to vote. However, they are typically the place where votes are counted and entered into the official results sheet, the fundamental "unit of analysis" for an individual or group seeking to assess the process and its' outcomes.

An inadequate number, or unequal distribution, of polling stations can limit the ability of some voters to participate. Review the physical location where voting takes place. Polling stations must be accessible, properly staffed and have the relevant materials for election day. If polling stations do not have enough supplies or materials, such as ballots, then some eligible voters may be denied their right to vote. The proper set-up helps avoid chaos or overcrowding, and can help make sure voting is smooth and orderly. Information about where polling stations are located and when they operate is critical to allowing voters to participate on election day.

It is necessary that the election committee members plan for the election in advance to avoid potential failure of the election. They should review the voting site preparedness and ensure that speedy rectification of any deficiencies can occur, and proper control systems are implemented to ensure better process.

Daily monitoring of the state of readiness of voting stations is essential, and even more so in the last week prior to the voting day.

## Election Day

### Initial General Review

First-level-readiness reviews should take place around two to four weeks before voting day, depending on the election timeline.

- ✔ Needs assessments have been conducted for each voting location and the required equipment and materials, logistics/transport arrangements, and site facilities improvements have been identified and recorded. Arrangements for supplies, either from the election committee or outside suppliers, are implemented according to prescribed procedures.
- ✔ Staffing numbers for each voting and count location have been approved, and staff are recruited for all positions. Training arrangements for all staff are in place.

### Second General Review

While continuous monitoring of voting site preparations should take place throughout the ensuing weeks, a major review should be scheduled for around seven days before voting day:

- ✔ All required voting station staff have been contracted and have been trained.
- ✔ Any additional telecommunications facilities required for voting stations are in place, and communication systems for all voting stations have been tested.
- ✔ Contingency plans for materials, equipment, and staffing are ready to be activated, if necessary.
- ✔ Status reports on receipt of all materials required for supply to voting sites, and action taken to redress any shortfalls.
- ✔ Make sure all the voters are notified about the election date and time, along with the election process via e-newsletter or postal notice.

### Distribute Supplies

To ensure voting site readiness, all materials and equipment required for the operation should be arranged prior to voting day; make sure all equipment and materials on the voting station are available. Any discrepancies should be resolved as soon as possible.

### Set Up

Voting readiness will be greatly enhanced if voting stations are set up by the election committee members on the day/night before voting commences, if possible. Outdoor voting locations are generally best left to the day-of-setup, due to the unpredictability of overnight weather.

A checklist should be completed by the election committee members, showing that all required actions for setting up the voting station have been completed. Relevant items to include on the checklist would be:

- ✔ Ensuring lighting is satisfactory, and, if requisitioned, any additional lighting equipment has been installed.
- ✔ All allocated communications equipment is in place and tested to ensure that they are operational. Communication systems include telephone, cellphone, fax, text messaging, radios or whatever process. To keep training simple, use one communication system.
- ✔ Confirming that the correct ballot boxes are present, remain unsealed, and are in the required positions.
- ✔ Ensuring that voting compartments have been installed, correctly positioned, and (where manual voting is used) have writing implements attached.
- ✔ Reviewing the information posters and notices required inside the voting station, and confirming that they have been displayed in the correct positions.
- ✔ If any electronic equipment is to be used for voting, it has been tested on-site and is functioning correctly.

## Voting Booths

Voting booths, also known as voting kiosks, are where voters review ballots and make their voting choices by completing the ballot. The layout of a voting booth is generally a semi-enclosed space to allow a voter to privately cast their ballot. Booths should be separated far enough apart to ensure that a voter within one booth cannot see inside another voting booth.

The booth has a flat surface, usually a portable desk that allows the voter to comfortably write their choices on the ballot, either when standing or sitting. Allowance should be made for wheelchair access and other physical disabilities. If an online voting process is used at the on-site location, the tablet or computer should be on the writing surface or desk.

Poorly designed polling stations can discourage some people from voting. Just like an ATM or public transportation, polling stations are systems, and their poor or great design could influence whether voters use them. When people deal with a poorly designed system - one that's inconvenient, confusing, or takes too much time, they might make voting mistakes or choose not to vote.

The following are some points to keep in mind when setting up a voting booth:

### Voter Privacy

People outside can't look in and see how other people are voting. Voter privacy is a vital part of election integrity, as the right to vote anonymously is a fundamental component of the democratic process.

### Universally Accessible

It should be placed in such a way that it is easily accessible by all potential voters, which may include persons with disabilities. Provide ample space beside and behind the booth.

### Voter Comfort

Ensure that the booths are set up so that they are well-lit, and have a writing surface positioned at a height that makes it comfortable to write. Chairs are optional, depending on the booth height. If you anticipate a large voter turnout, setting up a "waiting room" with chairs will allow voters waiting to vote a chance to rest while enduring the wait time and provide elderly voters a place to rest.

### Instructions

A voting instructions sheet should be placed in the voting booth to make the voter aware of the voting process. Review, and have others test, the instructions; having voters exit the booth, mid-vote, to ask questions after they have partially completed the ballot impacts voter secrecy. Don't forget to direct voters on what to do after they have made their voting choices! Signs help; just keep them concise, and simple to follow.

### Voting Tools

Ensure that the tools for casting the vote (pen, pencil,

## Election Day

marker, computer, or tablet) are placed in the voting booth, so that the voters can submit their ballots quickly, and without any issues.

### Ballot Box

There are many varieties and materials. "Too big" is better, as you want to ensure you can fit all the ballots in the box. The slot should be able to be sealed, so that the box can be secured after voting is completed.

If an online voting process is used, the tablet or computer will be on the writing surface or desk.

## Voting Day

On the morning of voting day, before the scheduled time for the commencement of voting, make sure all the arrangements are as planned. Any problems at the voting stations--staff who have not reported for duty, materials or equipment problems not previously noticed, security issues or large crowds of voters already gathered to vote--should be quickly and clearly reported to allow early implementation of contingency plans.

### What to Expect

What you should expect on voting day is directly impacted by your preparedness beforehand. If you were poorly prepared, expect problems!

But, if you were properly prepared (as a champion administrator should be), here are some things to expect on your voting day:

Ballot    Verify    Confirmation



President  
ElectionBuddy

Pick the candidate best suited for the role of President

### Chancellor

Select exactly 1 of 3 candidates or choose abstain to vote for none of the candidates.

Candidate	
Karen James Show information	<input type="radio"/>
Richard Brown Show information	<input type="radio"/>
David Cooper Show information	<input type="radio"/>
Abstain	<input type="radio"/>

Verify your selection

## Election Day

- ✔ Expect voter questions, regardless of how much signage and supplementary instructions you provide. For instance, voters may misunderstand your guidance and require clarification. Elderly voters may struggle to read instructions and require assistance.
- ✔ Expect voter mistakes, too! Depending on the severity of the mistake, you will want to ensure that all of your staff (if applicable) are familiar with the protocols surrounding an error on a ballot, including whether or not a ballot can be re-issued, and whether or not to accept a ballot.
- ✔ Expect voter unpreparedness, including: not bringing required identification to verify their identity, showing up late to the voting booth, claiming that they were never notified of the election, etc.
- ✔ Expect the unexpected. Voting day is when all eyes are on your organization, and your members expect you to be able to handle all problems quickly and smoothly.

### After Your Election: The Tally

Did you know that the longer you take to tally and disclose results to your members, the more likely they are to suspect you of suspicious and illegitimate activity surrounding the election? This means that you should plan to tally your results immediately after the polls close so that way you can disclose the results as soon as possible.

The agreed-upon best practice for result tallying is to conduct the tally the same day as the votes are cast, at the same location that the votes were cast.

### Election Follow Up

An election is a great opportunity for an organization to stay involved with its members, and vice versa. A good follow-up with your members can impact their turnout for next year, too, as it will leave a good last impression of the voting experience. Here are some tips for good follow-up with your voters:

- ✔ Tally and distribute the results as soon as possible to increase the perceived transparency of the election, and to satisfy your voters' curiosity! By voting, they have attempted to make their voice heard within the organization, and being quick and transparent with the results helps encourage the feeling that their voices were acknowledged, and that their opinion matters.
- ✔ Whether you do this in your results distribution, at the polling station itself, or in a separate email does not

matter – just make sure you thank your voters for participating in the election.

- ✔ Review voter lists to see who voted. For those who didn't, ask why – this information can help you plan for next year. Maybe some of your voters didn't receive the announcement - don't be surprised if people say, "I didn't know about it," even after you emailed, mailed, phoned, texted, reminded, notified in newsletters, etc.
- ✔ Update your membership list, using information from those who voted.

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