



Election procedures

How to Conduct a Successful Election



Does this look like your ballot tallying meeting?



How to Conduct a Successful Election

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The Benefits of a Well Run Election

All membership organizations exist for the benefit of their members and to further the mission of the organization. Therefore they must strive to have open, fair and secure elections. This fosters trust between the members and the management that runs the organization.

Running an election is a great opportunity to engage the membership and to encourage them to participate in guiding the future of their association. It also engages them to be part of the democratic process.

Member satisfaction: Open nominations and elections provide members a voice as to who will lead them, and it allows them to weigh in on the current issues. Connecting members through the election process will help increase member satisfaction. Most importantly, a well run election can reach members who don't usually vote, making your organization more approachable, which can translate into new members. Use this process as a way to impress, satisfy and engage your membership.

Increased participation: A well run election encourages member participation. A healthy participation rate indicates an informed and engaged membership. When members are active, it shows that they care about the future of their organization and are committed to its success.

Protection: Good governance practices combined with well run elections can help protect organizations from costly litigation, false accusations, corruption, and fraud. A transparent election combined with an auditable election process makes it clear to members that an organization is run scrupulously for the benefit of its members.

Resource conservation: A poorly run voting process can be a financial nightmare for an organization, resulting in wasted staff time, costly recounts, huge legal fees, and negative publicity. The cost and time to set up a streamlined, professionally run election far outweigh the risk of a poorly run voting event that can harm the organization's reputation and damage the organization for years to come.

Confidence: A well run election signals to members that the organization is run efficiently and effectively. Accurate election results give leaders and members alike confidence in the outcomes of the democratic process and assurance that the organization is heading in the right direction.

How can you make sure that your election runs as smoothly and effectively as possible?

The rest of this document will give you a clear road map to your next election.



How to Conduct a Successful Election

Set Goals and a Budget

To create a successful election, establish clearly defined goals and a budget. Take a look at your current election process and identify the areas that need improvement. Do you need to:

- Reduce costs?
- Increase the security and privacy of the process?
- Add more convenient election methods for members?
- Increase participation?
- Take the election out of the hands of the staff and create a transparent process?
- Boost the visibility of your organization?



Having a clear list of objectives will help you define the specific changes needed to ensure the success of your election.

Finally, it's important to understand your election budget. Your available funding will determine the degree to which you can realistically enhance your election process. Defining the costs involved will also aid in future budget planning and assist your accounting and finance department when it comes time to pay for materials and services.



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What Methods Fit Your Organization

Deciding on which balloting method to pursue will depend a lot on your demographics. Remember that older members from rural communities may prefer paper ballots because either they don't use email, or their internet access is too slow.

Conversely, younger members who are continuously involved in online media will probably prefer the online digital method.

There is also a hybrid method that combines the two to provide maximum flexibility. In this case you may want to set up a hybrid election; an online election along with sending out paper ballots, and even an option to use a telephone call-in method.

No matter which methods you use, be sure to consider your membership's needs and desires.

When your election is over, take the time to poll your members, keeping in mind your next election. Stay in sync with your members!



Paper ballots:

Members receive paper ballots in the mail and then send the completed ballot back to the organization or a designated return address.



Online voting:

Each member receives unique login credentials from the organization and then logs in to a protected voting site hosted on a secure server. Online elections have become popular in recent years because of their accessibility, efficiency, and cost effectiveness.



On-site elections:

Members vote at a physical polling station using paper ballots, voting booths, or electronic terminals, usually in conjunction with a meeting or a convention.



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Election Timeline



Proper timing is critical to the success of your election. A plan should be made well in advance to establish the opening and closing dates of the election, project milestones, and the date that results will be announced.

A good approach is to break the project into four phases:

1. **Initial planning and nominations:** Approximately six to eight months before the election, begin the process of attracting and nominating qualified candidates. Obtaining nominations for seats can be one of the most difficult parts of the election process because many members may not be aware of the nomination process or simply may not be interested. Just as with a public election, a lively contested vote will capture members' attention, resulting in greater engagement and interest. So make it a priority to communicate the nomination process to members and encourage them to run for office. Online nominations with the ability to write-in can be a quick and efficient method for getting this step of the election process done.
2. **Announcements:** Initial announcements should be sent out approximately three to four months prior to the election. Take the time to think about effective ways to reach members, such as email messages, organization publications, website banners, newsletters, social media, announcements at events, and build your promotion plan accordingly. Also be sure to include voting deadlines in all election announcements, so members won't forget when polls open and close.
3. **Voting window:** The "voting window" for member based organizations is typically three to four weeks. This window of time during which members are allowed to vote should be scheduled wisely. Avoid holding elections that coincide with national holidays or during typical vacation periods. If possible, gather and analyze any member data that you have that might help you schedule the best possible times.
4. **Results:** The timing for announcing election results should be carefully planned. For "paper" based elections, you'll need to set aside time to process, judge and tabulate the ballots. Up to one week may be necessary properly calculate and audit "paper" results, whereas "online" election results are instantaneous. Finally, plan exactly when & how you will communicate the election results.



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Accuracy of Your Database

A key component to a well run election is the creation of an accurate voter database. The success of your voting effort will largely be based on the quality of your member data. Verify that each eligible voter is present and listed only once in the database. Also, update all member contact information and collect any missing member data so that information in the voter database is accurate and useful for the election. Successful elections depend on the availability of valid member data so that voters can receive ballots, login information, instructions, reminders, and confirmations.

Don't neglect your member data! Doing so can lead to hours of additional labor assisting members whose information is out of date, dealing with frustrated members who haven't received voting information, and re-entering member data.





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Well designed Ballots

Every successful voting event has a well organized ballot. When creating the slate for your election, consider all the offices, bylaws, and amendments that will be voted on, the order in which they appear, and instructions for submitting an acceptable ballot.

Voting instructions should inform members about how to vote, the dates the election is open, return/submission instructions, login information (if applicable), and how to obtain assistance.

Consult your bylaws to determine if you can allow members to write-in candidates who are not listed. Another consideration is whether the ballot should identify candidates who are incumbents. You may need to consult your internal guidelines to see what is permissible.

When creating the ballot, consider what other materials should accompany the voting information, such as candidate biographies, a letter from the organization informing members of the importance of the election, and a return envelope (for paper ballots).

Biographies require some additional planning. Take into account the number of characters you will allow for each candidates information as well as the best way to organize blocks of text. Determine whether you will include images for the candidates, and consider other media options that will be acceptable to for your ballot. For example, some organizations now post video messages from candidates on their online election sites. If you have an extensive amount of biographical information to present in a paper election, a bio sheet or booklet might be a good option.

Whatever materials are created for the election, put the design and text through multiple rounds of proofreading and review for grammar and accuracy. The last thing you want is to send members inaccurate or poorly worded ballots and voting materials.

If you are working with an outside vendor, let the vendor know that you will require a sample ballot before the election, and set a deadline for receiving it. An organized, accurate ballot is essential for a successful election.



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Election Communication and Promotion

Communication:

All members should be aware of the upcoming election, know the voting period, and understand how to participate. Making this happen requires a comprehensive communication and promotion strategy.

Your first step in any communication and promotion plan will be to educate and inform members. Facilitate nominations by providing clear and simple communications throughout the year via emails, newsletters, and web & social media announcements. Announce upcoming board vacancies, explain the procedure for nominating leaders, and publicize the date of the next election. You should also provide information about board member responsibilities and compensation.

Consider the most effective ways of reaching your members and methods for encouraging response. Whether you promote your elections through the mail, at events, or using electronic methods, set up a definitive, well-thought-out schedule for when these announcements will be made.

For example: Six to eight weeks before the election, compile the information that members will need in order to vote, including nominee profiles, ballots, and concise voting instructions.

Next, arrange for your members to receive voting information two weeks before the election. This applies to information that is delivered by regular mail, email, and other media channels.

Finally, remind your members to vote. Reminders increase the voter response rate and can take the form of postcards, email blasts, or phone calls.

If you are using email invitations, encourage your members to add your organization's or online voting sites domain to their safe senders list. Doing so will help your election email invitations reach their intended recipients instead of ending up in junk mail folders.

During your election, keep an eye on voter participation. Doing so can help you recognize issues that might come up as well as behavioral patterns of your voters.



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Election Communication and Promotion, cont.



Promotion:

In some cases, response rate increases of up to 10% have been documented when comprehensive, multifaceted promotion plans have been implemented. The more channels used to promote the election, the greater the response rate is likely to be. Promotion channels can include:

- Direct mail / postcard broadcast announcements
- Email broadcast announcements
- Recorded phone messages
- Postcard and email reminders
- Flyers sent with membership bills or a notice printed on the bill
- Mentions in the newsletters and the organizations blog
- Website banners
- Social media tweets, posts, and messages
- Signage at events
- Mentions during speeches at events

Review the list above to make sure you're doing everything you can to promote your election. If the goal is additional participation, don't be sparing with promotion. One powerful message – delivered through multiple channels – helps members anticipate the upcoming election and increases turnout.





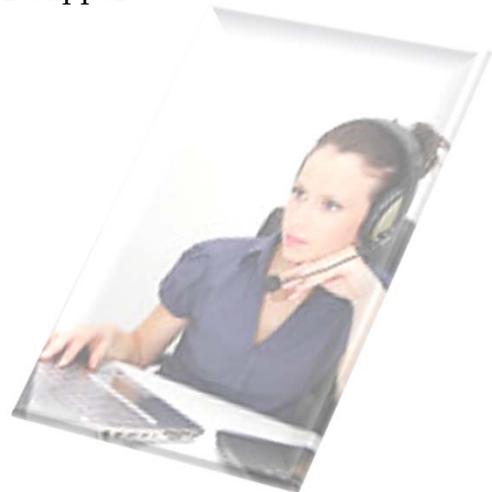
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Voter Support



A frequent challenge for many member organizations is providing adequate support for members who need help casting their votes during the election. Such support is vital for a successful election, and begins by prominently displaying clear voting instructions and providing contact information for further assistance. Organizations can offer help via phone, web chat, email, instructional documents, or any combination thereof.

Elections that lack adequate support for voters will inevitably lead to frustrated members who are likely to criticize the entire voting process, and this is the last thing you want! When implementing your election, remember to provide extensive voter support.





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Accuracy and Security

Handling ballot information and election data is a serious business. You'll need to take steps to ensure that each member's voting experience is protected. If something goes wrong, your members may lose trust in the entire election process.

When managing your election, it is vitally important to safeguard your data and voting materials at every stage of the process. You will also need to know exactly which people will have direct contact with the voting information and what their roles are in the election. Mapping the process and creating an accountability procedure establishes a secure chain of custody for ballot information.

If you are running an electronic election, don't take security of your online voting system for granted. Key elements of a secure online election include:

- Exclusive usernames and passwords
- An election that utilizes secure sockets layer (SSL)
- A modern web framework
- Data backup
- Quality control procedures
- A secure exchange method for transmitting sensitive files and data

Among your accuracy and security procedures should be a plan for election data backup. What if something were to happen to your election data? See if your organization or election vendor can utilize the services of an enterprise data center to help monitor your web voting, provide co-location of voting records, and protect your data from being lost for any reason.





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Sample Promotion Plan

To illustrate what an integrated election promotion plan may look like, the following table shows a “sample” promotion timeline for a member based organization election



DATE	ACTION	MESSAGE
8 weeks before voting begins	Newsletter election article	Announce election; include dates and number of candidates / offices.
7 weeks before voting begins	Website posting	Link to election information showing dates and number of candidates / offices
6 weeks before voting begins	Social media announcement	Announce why members should vote and ask for their feedback from prior elections
5 weeks before voting begins	Mailing to all voters	Include a reminder of election dates and note any changes to the voting process.
4 weeks before voting begins	Email	Announce election vendor if applicable, provide information about how and when to vote. Encourage members to vote and offer incentives if appropriate.
3 weeks before voting begins	Newsletter election update	Remind members of the election dates and any changes to the voting process
2 weeks before voting begins	Posters / flyers	List where and how members can vote. If you have on-site voting, include a map of where members should go to cast their ballots.
1 week before voting begins	Email reminder	Remind members of election vendor, provide instructions on how and when to vote, and note when members can expect voting materials.



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Preparing Staff Members



Your election depends on the staff members who run it. Once you have identified your goals, picked your participation methods, planned your communication strategy, and established your security measures, you will need to assign roles to your staff. Choose reliable staff members to take charge of each of the following tasks:

- **Managing the voter database.** This includes updating member contact information and insuring that it is accurate.
- **Coordinating voting materials.** The voting materials coordinator is responsible for creating all election materials, including nominee profiles, proposed policy and bylaw changes, voting instructions, and the ballot.
- **Ballot delivery.** This involves ordering materials, assembling mailing packets, arranging for postage, and mailing the packets on schedule. For electronic elections, email invitations will need to be coordinated with the database manager.
- **Registration and credentials.** If all or part of the election is held on-site, you will need to assign staff to facilitate the vote. This includes check-in, distributing ballots, and providing instructions.
- **Analyzing results.** Results analysis includes tabulating the final ballots, compiling voter data, reporting the results, and analyzing trends.





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Strategy for Releasing Results



The announcement of voting results is an important event for your organization. The conclusion of your election may provide your association with new leaders that will shape it for years to come. Therefore, it is important to plan and execute this step flawlessly. Take extra time to vigilantly judge, review, process and tabulate your election data.

Reports containing information beyond the basic election results can be extremely helpful when trying to analyze the results and make decisions for future elections. When planning your election, be sure to include all the fields necessary for your reports in your voter database. Doing so will allow you to filter the results and analyze voting trends by region, section, and demographic attributes. This quantitative data will provide you with valuable information about participating members and will be extremely useful in planning successful awareness campaigns in the future.

A well-prepared seated candidate report is an excellent way to release and publish the final election tallies to the public. This report should be in executive summery format, sharing the highlights and a synopsis of member voting.

When announcing election results, its essential to be prepared. Details, plans, information, voting choices, and results are often scrutinized by interested parties. Everyone expects things to run smoothly, and if they don't, your members will want answers.





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Strategy for Releasing Results, cont.



The best way to react to any issue that arises with your election is with a carefully prepared response. Having a plan and a message can have a calming effect on members and executives alike. Below are three ways to make sure that announcing election results goes smoothly.

1. **Create a crisis communications plan.** Anticipate the possible situations that could occur during your election, and carefully consider how you would communicate the facts to your members, leaders, and community. Use this as a basis for your crises communications plan, which you will execute in an emergency. Practice the steps in your plan, so you will be ready to act if necessary.
2. **Review deadlines and processes.** Do you have tight reporting turnarounds or other deadlines that might put your organization in a risky situation? Consider these demands and do what you can to manage them beforehand. You would be better off proposing changes to your schedule or process, rather than unintentionally setting yourself up for a severe time crunch.
3. **Always be honest.** Whether you are dealing with public criticism of the voting process or a full audit of election results, carefully strategize and plan your actions. Be honest, be truthful, and avoid jumping to conclusions. Deal with the facts, and carefully share what needs to be known. Never attempt to cover tracks or withhold necessary information. If disaster strikes, don't deny it. Recognize that your members will look to you for guidance and will expect you to take appropriate action. Act in the best interest of the organization, and deal with the challenges accordingly.



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Avoiding Challenged Results

As an election manager, the last thing you want to hear is the phrase “challenged election”. Challenges generally occur when there is doubt about the integrity of the election process or when the final results are extremely close.

The good news is that if you have followed the checklist in this guide, a recount of the election results is unlikely. However, challenges can still happen. Here are a few tips to help your organization guard against challenges to its election results and defend itself if they occur.

1. **Maintain accurate voter information.** Remember the importance of an accurate voter database. Make sure that your eligible voter information is in good shape. Eliminate duplicate email addresses and make sure your database is properly filtered before registering your voters.
2. **Restrict access.** Access to voting materials and data must be carefully monitored and controlled. An information leak could jeopardize the validity of your election. No person with a possible vested interest in the outcome of the election should have access to member information or voting data.
3. **Establish a secure system.** Employing top security methods is another way to prevent challenges to results. If you are using an “online” voting system, protect your voting data by making sure your online process utilizes SSL, unique usernames and passwords, and a modern web framework. For “paper” based elections, ensure you have a chain of custody in place, and that ballots are accounted for at all times.

Conclusion

In addition to being a part of your organization’s operations, elections can increase member satisfaction, enhance participation, protect the organization, and conserve resources. To realize these benefits, you'll need to employ careful planning, sound strategy, and clear communications.

Make the most of your election by using it to connect with as many members as possible and get them engaged in your organization’s mission. Before running your next voting event, use the recommendations in this guide to plan and execute your best election ever.