Implementing best practices for voter guides in the 2016 California Primary

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Implementing Voter Guide Improvements

Picking up on earlier research about information needs of voters, the Center for Civic Design continued its work on improving voter guides throughout California by supporting the county election offices with training, consultation, and online resources ahead of the June Primary Election. This report reviews that process and the results measured by adoption of the new voter guide designs for the June primary.

With our partners in Orange, Santa Cruz and Shasta counties, we created templates and design guidance for voter guides with the information that matters most to California voters. We chose these partner counties to represent the diversity of California counties by: population size (small, medium, large), required languages (English only, English and Spanish, and English plus 4 more languages), and geography (rural, mixed, and primarily urban).

We created templates (and tested them with voters in all three counties), built collection of visual resources, and gathered example documents to allow the counties to work independently to revise their own voter guides.

Although our original plan was to pilot the new voter guides in the three partner counties, there was enough interest to broaden the project. We ran half-day in-person training for 22 counties, and had follow-up consultations with individual counties. In all, we touched over 40 of the 58 counties with our education and outreach work.

As we worked with election officials in preparation for the June primary, we helped them create other forms and voter ed, especially information to help communicate options for No Party Preference voters in the Presidential Primary. We also worked on options for the ballot design for the US Senate race to help prevent overvotes.

To evaluate the impact of the voter guides, our we looked at adoption of our recommendations and materials in the June Primary. Based on our analysis of voter guides from across the state, 34 of 58 counties

have adopted some portion of the recommendations, with 7 counties adopting the full design.

With our partners at the League of Women Voters of California Education Fund, we also worked **with the Secretary of State's office on** two key pieces of information. Both projects came directly from the research in the earlier project, and were completed in early 2016 for the primary election. The first is an updated plain language version of the Voter Bill of Rights, under SB505. The second is an explanation of the how to vote in a California primary election, comparing the Presidential, Top-Two, and nonpartisan primaries. Although the primary explanation was not in the final State voter guide, wide adoption of these materials in the county guides added to the impact of this project across the state.

In summary, the Center for Civic Design has used best practices in visual design and plain language, backed up by research in three counties, to create templates for voter guides in California that showed heavy adoption in the June primary election. We look forward to increased adoption for the November General Election and their use into the future.

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Voter Guide Improvements in the 2016 Primary

This report shares the outcomes that show the impact of the work to date. We provide the context for the work, describe the details of training and other consultative guidance we offered. We consider adoption of the recommendations in whole or in part the primary metric for impact. We also discuss how to assist the counties in preparation for the November General Election and add a few comments anticipating the future of digital tools for preparing voter guides.

Why voter guides are important

Voting is a critical action that citizens undertake infrequently. The voter guides and other collateral from the counties need to be easily recognizable (and distinct from partisan materials) and effective. Three additional reasons for adopting the new format:

California's brand: If all 58 counties adopt the new format, and continue to coordinate across the counties (large, small; rural, urban; monolingual, multilingual) as new wording and layout issues are identified, we believe voters will accept that California's system is consistent across the state, and thus is a reliable source from which voters can make a decision.

Voter mobility: As a corollary we expect that voters, who move from one jurisdiction to another, will adjust to their new county's system more easily with a standardized format.

Error reduction: Along with the plain language and layout recommendations, we have consciously aimed to create materials that reduce other sources of errors or confusion (such as the ones that inspired our organization's founding, namely confusing alignment of candidates' names with the target area for selection of one's choice on the butterfly ballot of Florida in 2000).

Initial research in 2014 & 2015

This work began over 2 years ago in collaboration with the LWVCEF and other members of FOCE. In 2014 the we interviewed voters and non-voters to learn what regular voters and new voters know about and need from election materials supplied by the counties.

These prospective voters need just the right amount and type of information

to support their decisions in voting – not too much and not too little. They want trust-worthy information, which may be different depending on how experienced the voters are. More experienced voters look to the pro or con arguments in the voter guide to help them make decisions about measures. New voters may seek guidance from their friends, family or community organizations especially about measures. They have questions about mechanics of voting **from What's on this ballot? to How do I mark the ballot**? and How do I vote by mail?

From their responses to our sample materials, we understood that their request for **"simple" and "clear," does not mean "simplistic." Voters want** well-organized documents, written plainly. Online or electronic sources about the election may be of value to younger voters, but are less likely to be accessed by older voters. Documents that have a strong visual layout dimension get a **positive response: The layout signals what's important and** how to scan and skim the information to get the gist or dive into the fine print.

Our review **of California's** June 2014 materials from all 58 counties gave us **insight into basics that are typically included** (dates, hours, candidates' statements, and legally required information). We also learned that California counties differ in how much additional material they include in the printed booklets, partly from practical or financial reasons. Some but not all counties left out information about accessibility of polling places, language support at the polls, deadlines for voting by mail, specific address of polling places – all information that we had learned was important to voters.

Working with exemplar pages from around the state, we asked voters to choose the pages they wanted in their own voter guide, and talked to them about why they liked these pages.

From those conversations, we came up with 4 basic guidelines that describe information both experienced and new voters want.

- The right information
- Organized in the right way
- **Presented so that it's e**asy to read and understand
- And personalized for me.

Continuing the work in 2015, we prepared a draft of the voter information guide for the fictional Franklin County, to illustrate how we put these guidelines into practice. We tested the prototype in several locations around the state, working with voters who might find reading about elections a **challenge: people who don't read well, low propensity voters, bilingual voters,** and voters with disabilities.

The results of the work were presented in May 2015 as a series of 4 webinars, each lasting about 40 minutes, expanding on those 4 points above, along with a printed Best Practices Manual. Both the webinars and the Manual were produced in collaboration with the League of Women Voters of California Education Fund and made available on the website, cavotes.net.

Next, working with our 3 partner counties (Shasta, Santa Cruz and Orange), we redesigned their version of 2014 guides to test during late 2015. In this testing, we again worked with a mix of low propensity and frequent voters. We asked them to use the redesigned Voter Information Guide to find information they needed to vote effectively. Their feedback and interaction with the booklets helped us understand what still might be confusing. We included translations of some pages to get feedback from voters who prefer Spanish, Chinese, Vietnamese or Korean.

The responses we got from voters helped us to revise our templates and expand the inventory of icons and illustrations to account for specifics of how elections are conducted within the counties. We wanted instructional pages to be clear in words and images about how to vote.

 In the months before the June 2016 Primary, we conducted in-person training for county level election officials, and supported many counties by email or phone calls, as they prepared materials for the election. We created a web page of resources and a few specific tools that may prove helpful to election officials in laying out their documents.

Training and support

We created a wide variety of ways to share the research and recommendations with election officials in California (and around the country). These events were conducted with our partners in Shasta, Santa Cruz and Orange Counties and the LWVCEF.

- 4 in-person training classes in northern, central, southern California and the Bay area with our partner counties
- Individual meetings at CACEO New Law in December 2015
- Telephone, email or shared-screen consultations
- Workshops at FOCE 2015 and 2016
- 4 webinars in early 2015

In total, we reached 40 of the 58 counties. Others may have attended workshops or other meetings without giving us their names, or may have listened to the recorded webinars from early 2015.

Counties attending training or webinars

★ Training hosts and partners

Table 1: Training and participants

Training Date	Host and presentation partners	Number attendees (including presentation partners)	Counties attending
February 3, 2016	Glenn Shasta	25 people from 11 counties	Amador Colusa El Dorado Mono Nevada Sacramento Sutter Tehama Yuba
March 1, 2016	Madera Santa Cruz	13 people from 6 counties	Fresno Stanislaus Tuolumne Tulare
March 22, 2016	San Mateo Santa Cruz	7 people from 2 counties	Santa Clara
March 23, 2016	Orange	9 people from 3 counties	Riverside Los Angeles
May 2015 Webinars	LWVC Education Fund	7 counties (in addition to those attending training) 31 total counties registered for the webinars	Calaveras Imperial Kern Kings Merced Plumas San Bernardino
Individual Consults or meeting at CACEO New Law, December 2015	LWVC Education Fund	11 counties (in addition to those attending training or webinars)	Contra Costa Inyo Marin Mariposa Monterey San Benito San Diego San Francisco San Luis Obispo Siskiyou Solano
Total attending training in 2016		22 counties (54 people)	
Total counties in all training opportunities		40 counties	

Training for California election officials

Our original plan for this project was to pilot the templates with three counties (Santa Cruz, Shasta, and Orange) in the June Primary Election, and then conduct training and outreach after the election. However, we learned that other counties were also interested in using the new designs in June.

In response, we created a set of templates and a web page with resources, and we created an in-person class, which we offered in four locations. In addition to a slide presentation, the training incorporated individual or group activities, and interactions among the learners from different county offices.

Components of the training

During the in-person training, we reviewed the content of the 4 LWV-Education Fund-sponsored webinars briefly, since we did not know if everyone had seen them. Coming straight from the research, the information and perspective in the recorded webinars helped provide the rationale for our choices in the template and the guide overall. The training included updates from our testing in late 2015, using prototypes based on real material in the counties.

We also urged the officials to use any part of the new templates and formatting they felt comfortable with—that is, made it clear that they did not have to adopt the entire design. We acknowledged their legal and fiscal constraints, and suggested they could adopt the design, the plain language text, or both.

Much of the training focused on 10 types of information in the voter guides. As we worked with and got feedback from the counties, we learned what was easy for them to understand and feel confident attempting, and what was hard.

Discussions during the training sessions helped us to better understand additional constraints or legal requirements for the guides. For example, our early research found that the letter from the Registrar of Voters is a way to humanize the process by indicating there's a real person who stands behind this whole process. We learned, however, that the ethics commission (FPPC) advised against using the photo or signature of an elected County Clerk, as it might be construed as unfair campaigning. We changed our illustration of this recommendation to focus on the elections office, or omit a signature entirely.

Effectiveness of the in-person training

There are two ways to think about what makes the training effective— whether it meets technical requirements and whether it is motivating.

Technical: Does the training and the **set of resources we've provided enab**le election officials do the kind of extensive rewriting and reformatting of a very familiar document with lots of tradition behind it?

Motivation: Would they choose to use the new designs and templates? Is our evidence of improvements for new voters, non-English speakers, people who have difficulty reading, and distracted voters sufficient to motivate election officials to undertake the effort?

At the end of the first training in early February, officials from one county **took us up on our invitation to "Bring materials along that you'd like feedback about."** This request proved helpful in several aspects:

- The county was able to get quick feedback on a number of items in that setting to help them get started quickly. And they were gracious about receiving it.
- **The trainer could make comments about "don'ts" that hadn't come up during the "do's" part of the training**, such as these specifics:
  o **Don't use** center alignment for the cover; use left justification as illustrated in the template
  o **Don't add extra graphics**; let the layout guide the **viewer's eye** to find the information without clutter
  o Avoid the use of colored text as a decorative element; consider our recommendations about color in the templates
  o Avoid overwhelming the voter with large blocks of text; rewrite from legalese to plain language, without watering down the meaning.
- Other counties could see that the task would not be daunting.

A week later, we received a fully revised document from this county. Other than a few minor details, we were pleased that a small county demonstrated their capabilities, and that they provided a great example for others. We also saw that it was possible to use the resources we provided to accomplish the task of revising their voter-facing documents to conform to the best practices, in a reasonable amount of time.

The training appears to be effective for those who participated and then used the resource materials that we made available. We posted the materials on a website for anyone to use.

Remote consultation

We announced at each training session that we would be available for consultation on any issues that were unclear or not directly covered in the training. We expressed our interest in seeing how they handled both familiar issues and some that might be unique to their situation (or **that we hadn't**

encountered yet), so that we could solve their problems with them, as well as expand our templates and documentation to cover these items.

At least 10 counties got in touch for private tutorials, questions about formatting, or to share ideas.

Consultation on other Primary Election materials

The partner counties identified at least 2 big issues that they needed to handle well that went beyond the voter guide for the June Primary.

- Explanations for unaffiliated voters about how to participate in the party-nominated races for President.

- The design of the ballot for a US Senate race that had a large number of candidates.

Information for voters about the Top Two Primary

California's Primary mixes open- and closed-primary practices, which makes the explanation for unaffiliated voters complex, especially on a ballot that mixes general primary contests with the presidential primary. With many new voters, and many voters who may not have voted in a presidential primary in 8 years, elections offices already knew that many voter were confused.

Work on the explanation of the three different types of primaries in California started with the early research, and was completed during 2015. The LWVCEF collaborated on this work, helping make sure it accurately reflected the Election Code.

We were asked to help come up with voter education material that could be used to explain this in postcards sent to voters, materials for social media, or information that could be included in the voter guide.

We helped Santa Cruz and Shasta design a post-card and other materials that would inform unaffiliated (No Party Preference or NPP) voters what steps to take if they wanted to vote for a candidate for President.

All of the materials we helped create included information about the three parties that did not allow cross-over voting—covering all of the options and anticipating the confusion reported in the Sacramento Bee article[1].

"Do you want to vote for President on June 7, 2016"
This format has three columns for:

- Voters registered with a party
- Parties with cross-over options for NPP voters
- Parties without a cross-over option.

"Got the 'wrong' ballot? Easy fix. Just call or email, and we will send you a second ballot" This card went out to vote-by-mail voters after calls starting coming in about getting the "wrong" ballot.

"Your party will determine which ballot you may vote in the June 7 Primary" Another, larger format explanation of what ballot voters will receive, and what other contests are on all ballots.

You can see this work in a showcase on our website, civicdesign.org, Selecting primary election ballots in California[2], that received good circulation in social media.

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1 http://sacramento.cbslocal.com/2016/02/09/why-was-the-republican-party-left-off-a-sacramento-county-elections-mailer/
2 http://civicdesign.org/showcase/selecting-primary-election-ballots-in-california/

Ballot design for the US Senate race

The US Senate race presented an issue that is likely to come up again in the future as states expand access to the ballot for candidates.

In the 2016 Top Two primary, 34 candidates qualified to run for the open US Senate seat. Each voter gets only one vote.

We knew from other research (notably the quantitative analysis of other contests done as part of the *Better Ballots*[3] project) that when candidates in a single contest are displayed across more than one column, the design promotes more overvotes than normal.

We wanted to know how to display all the names on the ballot and write instructions in a way that helped voters choose only 1 and minimized overvotes.

Working with Santa Cruz County, we tested three different layouts, and were shocked to see that a third of the participants overvoted. Los Angeles County conducted their own usability testing and had even worse results. Continuing to test with daily changes, they conducted testing for over a week to find a design that reduced the errors.

We continued working on the problem with counties through discussions on ElectNET, the CACEO mailing list).

Analysis of the impact of ballot design on overvotes

The US Senate contest created a natural experiment: 58 counties each had to decide how to best display the contest to minimize over-voting (or under-voting), and created 58 different layouts, including:

- Splitting the contest across 1, 2, or 3 columns, or across multiple pages
- Headings and other visual elements to create a boundary for this contest
- Whether other contests appeared on the same column or page.
- Wording and placement of the instructions

We are working with political scientists David Kimball and Martha Kropf and the Brennan Center (the *Better Ballots* team) to analyze the election results.

We will collaborate on a report, looking at the impact of ballot design on overvotes.

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[3] See: http://civicdesign.org/breaking-the-ballot/ for a summary and
https://www.brennancenter.org/publication/better-ballots for the full report

Tools & resources for election officials

During the training, we shared several resources for creating the Voter Guide for a California county.

Election officials could access a webpage with all of the resources and guidance in one place. At first a simple list of links, the resources site was expanded into a new workbook in the Field Guide series, titled Designing a voter guide to an election[4].

Resources in the workbook include:

- Document templates. We created our templates for word processing software likely to be familiar to most counties, Microsoft Word. We wanted to avoid both the expense and learning curve for new software, at the high demand time close to the election. InDesign templates are available also for the small number of counties that use this tool.

- Guidance on using the templates. Notes on lessons from the research, and tips creating the different types of information. These notes started as part of the training materials, and are now pages linked to the workbook.

- Election Images. We placed all of the illustrations and icons in ElectionTools.org[5]. In addition to making them available for California voter guides, this site helps the collections become a resource for civic engagement, freely available to election officials anywhere. We have updated the inventory of illustrations and icons in a consistent style, and in 4 formats (for web, print, and posters, and the Adobe Illustrator source files).

- Advice on colors for election materials. This section is important because election officials are accustomed to using colors to arouse patriotic feeling (red/white/blue), but may need guidance with choosing colors that function with other meanings. We created a palette of colors, with accessible variations and shading, that we also coordinated with the colors specified by the SoS for parties.

- Advice on layout for multiple languages. Although we have not found a single recommendation for how to organize a bilingual voter guide, we have collected some patterns that are used across the state, with pros and cons of each.

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[4] http://civicdesign.org/fieldguides/designing-a-voter-guide-to-an-election/
[5] Civic icons and images on ElectionTools.org: http://electiontools.org/tool/elections-images-library/

- Ballot style layout calculator. This spreadsheet aims to help election officials figure out the page layout for the booklets for each ballot style and manage the list of content and filler pages needed to fit within a standard printer signature of 4 or 8 pages.

- ClearviewADA font. We arranged for a discount for any election office that wants to use this font designed to be easy to read for people with visual or reading disabilities
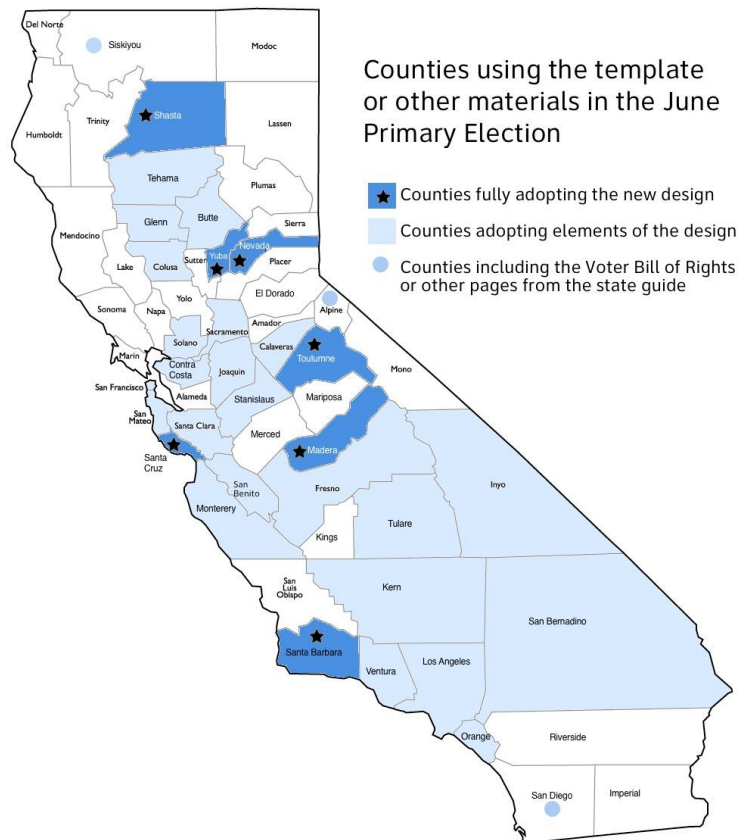
Outcomes and impact

We encouraged counties to start using the materials in any way that they felt comfortable. For example, a few adopted the entire template; some tried the cover or specific pages. Others made changes to content in their existing guides.

Following the election, we collected the full set of voter guides from all 58 counties and used this collection to analyze how many counties used the voter guide templates or other materials. The Evernote collection is available on the web[6].

How many counties adopted the recommendations?

Our most important metric is the number of counties who adopted some of all of the materials and design suggestions.

Counties using the template or other materials in the June Primary Election

★ Counties fully adopting the new design

Counties adopting elements of the design

● Counties including the Voter Bill of Rights or other pages from the state guide

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6   https://www.evernote.com/pub/centerforcivicdesign/2016californiaprimary#st=p&n=19c0a272-d34a-416f-bcfb-4bae77e3dd0d

Table 2: Level of adoption

| Level of adoption	Number of counties	Support or training?	Languages supported	Counties
Full or nearly complete adoption of the templates	7 counties	6 – Yes 1 - No	4 – English only 3 - Spanish	Santa Cruz, Shasta (partners) Madera, Nevada, Santa Barbara, Tuolumne, Yuba
Adopted elements	23 counties	20 – Yes 3 - No	4 – English only 13 – Spanish 3 – Sp, Chinese 3 – Other	Butte, Calaveras, Colusa, Contra Costa, Fresno, Glenn, Inyo Kern, Los Angeles, Monterey, Orange, Sacramento, San Benito, San Bernardino, San Francisco, San Joaquin, San Mateo, Santa Clara, Solano, Stanislaus, Tehama, Tulare, Ventura
Only SoS materials only	3 counties	1 – Yes 2 - No	2 – English only 1 – Other	Alpine, Siskiyou, San Diego
None	25 counties	7 – Yes 18 - No	17 – English only 7 – Spanish 4 - Other	Alameda, Amador, Del Norte, El Dorado, Humboldt, Imperial, Kings, Lake, Lassen, Marin, Mariposa, Merced, Mendocino, Modoc, Mono, Napa, Placer, Plumas, Riverside, San Luis Obispo, Sierra, Sonoma, Sutter, Trinity, Yolo

Not surprisingly, there is a strong correlation between not adopting any of the template elements and not having any support contact or training.

More encouragingly, 7 counties had no training and yet included at least some elements of the templates, even if only the materials from the **Secretary of State's office.**

Some counties that have strong voter guides added or updated elements they already included in their guide.

Solano County adopted several of the design ideas, such as the page banners, but created their own templates. They were even able to include the polling place location on the front cover by working with their printer.
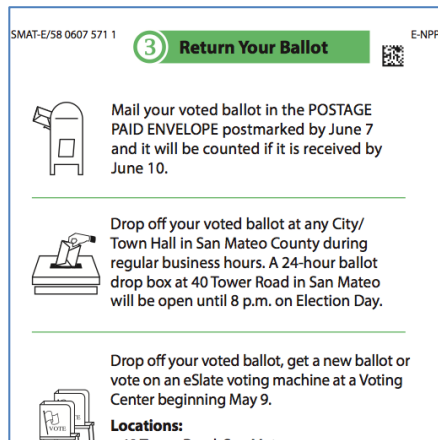
San Mateo County's designer used many of the ideas in our recommendations, also creating their own design templates and icons.
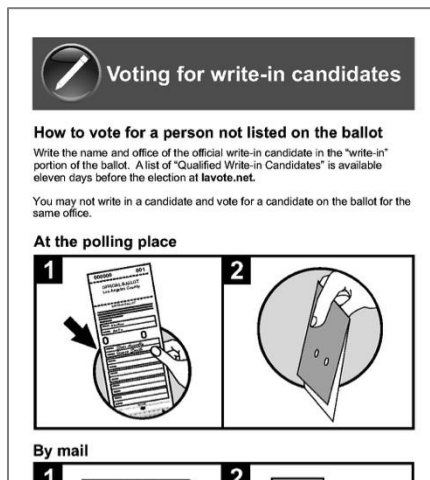
Los Angeles County also has their own excellent designs that follow many of the principles from the research, but that have a unique form factor and their own visual design style.

What elements of the templates were adopted?

We were also interested in which elements of the templates were most likely to be adopted. In our analysis, we looked for specific pages or content elements that we believe are important to voters based on our research.

The two updated elements from the **Secretary of State's office had the** widest adoption, reaching up to a third of the counties.

- How to vote in a primary. California primaries are complicated. In our first research we dropped this page because it was so confusing to voters. In this project, we returned to it, determined to find a solution. Our **design and content was adopted by the Secretary of State's office and** included in their primary voter information guide, encouraging counties to adopt it.
- Voter Bill of Rights. As part of implementation of a new state law, we **worked with the Secretary of State's office on a plainer language version** of this document, after learning in our initial research how important it was to voters.

Other elements were adopted by varying numbers of counties. Information that added a new page, or that touched on required information was the most difficult. We hope that seeing these pages in action will encourage more use of them in the future.

- Front cover. A consistent cover design, with the right information, helps voters across the state, especially as they move across county lines, or in comparing the county to the state guide.
- Table of contents. This element was in few of the original guides we examined, but proved to have a big impact for voters.
- Ways to vote. This page, borrowed and improved from some existing guides, helped voters understand their options – and even that there are options.
- **What's on the ballot.** We were surprised that research participants insisted they had seen this page before, even though it was new. This simple listing of the contests, divided into the two sources of information (the county and state guide) was clearly important.
- Measure introduction page. This was another new page that provided high value to people in our research, giving them an overview of the rest of the information required for local measure.

Table 3: Level of adoption of specific elements

Element	Level of adoption	Notes
Cover Design and content	11 – Full 8 - Partial	Full: the exact layout Partial: similar layout or missing elements
Table of contents At the beginning of the guide	15 counties	Some counties had a list of contents in earlier guides, but most were new elements
Ways to vote page	17 – Full 1 - Without images	A small number of counties had an older layout of this element (not included in this count)
What's on the Ballot page	9 – Full 2 – Partial	Full: the layout including images of the two guides and the list of contests
Measure introduction Only 40 counties had measures on the primary ballot.	7 – Full 2 – Header only	Full: a separate page with all of the elements Header only: Just the layout for the number, title, and measure text
How to vote in a primary SoS new version	21 – Full 13 - Other	Other: Information about voting in a primary in another format
Voter Bill of Rights SoS new version	19 counties	Some counties included the VBR as a filler, so it did not appear in all guides (not included in this count)

Feedback from voters

We always want to hear feedback from voters, but unfortunately, election offices are more likely to hear complaints. There were some problems that we worked to address in updated templates for November, but the good news might be in the relative silence with a few positive, unsolicited reactions.

Next steps

The November General Election

The transition for election administration from the Primary to General Election is a rapid one. By early August, as we write this, most counties have already started to work on their November voter guides.

Rather than schedule additional in-person training sessions, we can help counties by continuing to consult with counties using any available communication method.

We also participated in the FOCE-sponsored Elections Design Webinar on August 17 where we will share the new web pages and resources available for the counties and other election advocates. (Recording available at FOCE website.)

And, we will continue to work with our partner counties to address any issues or information needs as they come up between now and the election.

We have already heard that several counties have indicated that they are interested in revising their Guide for the General election, and feel that they have the bandwidth to undertake it in August and early September.

A handful have already indicated that they are interested, but will not be able to do anything new until after this election cycle, because of other complications in their jurisdiction.

We hope to be able to stay involved, and have created the website to create a permanent repository for the resources.

And beyond…

Digital voter guides. At some time in the future, most voters will only see a digital version of their voter guide.

Right now, voter guides are often made available online only as a downloadable PDF. Some counties, however, are moving to solutions that put all of the information into web pages, customized by ballot type.

Although presentation details may change as information goes online, the core principles of plain language, consistent visual design, and working to communicate across the civic literacy divide remain.

Anytime information. We also believe that this work is useful outside of the election cycle.

The Ways to Vote can educate new voters about the mechanics of voting. The information about different options for voting and how they work, accessibility and language access, and the Voter Bill of Rights all help new voters—high school students, new citizens, or people new to the area— prepare to vote.
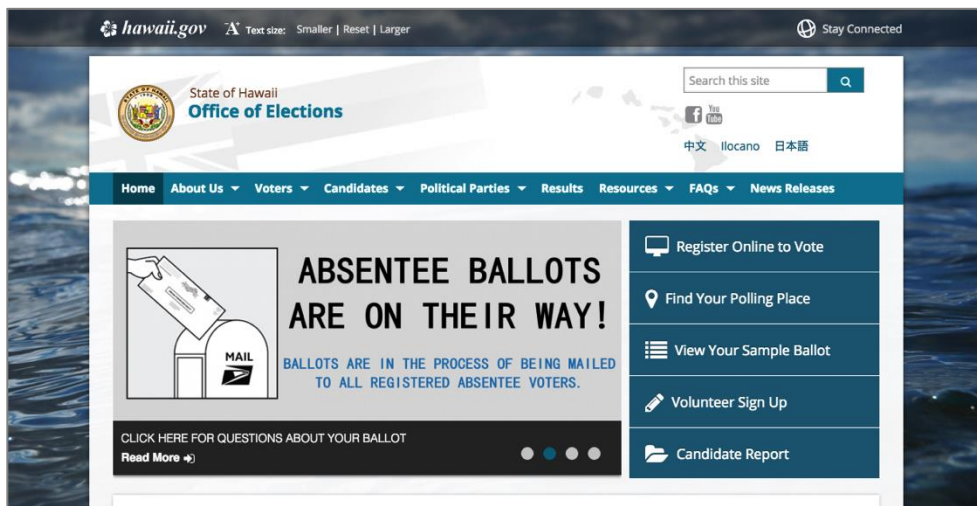
National use. Election laws and culture differ around the country, but the information needs of voters are similar. By publishing the information about designing voter guides, and putting the civic images library in a popular election administration website, we hope to see these ideas adopted outside of California.

Civic icons and images from the ElectionTools.org website (August 2016)

In fact, this is already happening. We are delighted that the web site from Hawaii's Office of Election incorporates one of our illustrations

One of the home page images from http://elections.hawaii.gov/ (July 2016)