Planning & Organizing Elections

YesElections

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Contents

Your Go-To Guide

Elections are a vital function for member-based organizations.

Each year, members gather at convention halls, designated voting sites, or complete ballots at home to decide bylaws or elect board members.

In many cases, these contests are legally mandated by the states in which organizations operate.

The good news: You don't have to do it alone. *(More on that in a bit.)*

Consider this your go-to guide for member-based elections. Whether you're an election novice or have historically relied on professionals, this how-to guide will prepare you for each crucial step.

CHAPTER 1:

Breaking Down The Election Process

As you can tell, elections are all-encompassing. Don't worry, we're going to flesh out each step as we move along. Before we do, however, let's go through a broad overview of elections that you may not be as familiar with.

First, every single facet of an election needs to be securely managed.

That means nominations should be conducted on a secure site to protect personal information and images that may be uploaded for the ballot.

Next, voting security is crucial.

We're not necessarily referring to hacking protections, but more innocent mistakes, such as duplicate voting. The integrity of an election is paramount, and the easiest way to lose member trust is by running a hamfisted election.

Finally, the method by which members vote is one of the most significant decisions you'll make for your election.

It will dictate everything from cost and ballot delivery to how votes are counted. Remember: Many do-it-yourself programs are internet-only, while full-service election vendors offer multiple methods, including mailed ballots, online voting and hybrid variations, along with a full suite of services, including security.

Organizing elections can be difficult, especially when you're already dedicating much of your time working for members.

Professional election management agencies provide a wide array of services, including security, nominations, data privacy, accurate tabulations, and much more.

What You Need To Know About Planning Elections

Thousands of member-based groups host elections each year.

These events decide bylaws, regulations, board positions, and more.

When election season rolls around, members generally cast either a digital or paper ballot. Once that's done, an election agency tabulates the votes and the winners are announced.

The process can seem rather easy from the outside looking in. In practice, however, elections are much more complicated than they look.

So, let's start with the basics.

Planning Elections

Your first decision is a big one. You have to figure out whether you're going to run the election internally, or hire an experienced election management agency.

Cost is always a concern—and that's why groups seriously consider all options. Smaller groups may prefer trimmed-down, do-it-yourself programs that provide comparatively fewer services than the professional, "soup to nuts" election providers.

These are important decisions that need to be made long before elections are scheduled. The only way to do so is by educating yourself on the services currently available on the market, and how they differ from the professionals.

With that out of the way, you'll now need to select an election method. Depending on the service or agency you're working with you might have myriad options to choose from. They can include paper voting by mail, on-site elections, telephone voting, online balloting, or hybrid methods. The latter enables organizations to offer paper voting to those members preferring that method, while providing online services to others.

After selecting an election provider, this will be the most significant decision you'll make. In some cases, voting methods can be customized to fit an organization's particular needs.

The price of stamps has gone up precipitously. In fact, 2019 saw the single largest increase in history—*now costing 55 cents.*

It's safe to assume that stamp prices will only continue to increase. But cost savings can be had. Because YesElections is fortunate to have a USPS permit for bulk mailings, we're able to provide significant discounts to member-based organizations.

This decision is not only important because it impacts how members will vote, but can have dramatic consequences—positive or negative—for an organization's budget.

That brings us to cost. Thoughtfully examine your organization's finances and determine what percentage of your overall budget can be devoted to election services. In a perfect world, your organization would have already earmarked expenses for an upcoming election. But budgets are rarely ever concrete, and unexpected expenses and financial uncertainty may force you to change course. If cost is your primary concern, the best advice most election management agencies will offer is to operate an online election. For starters, internet voting eliminates paper and mailing expenses, *which can be exorbitant.*

Now, one of the most important steps is ensuring your Association Management Software is up to date and relevant contact information (email and physical addresses) is correct. This vote file is crucial because it provides election vendors with key information about who's voting and for what. For organizations with dues-paying members, contact information can be one of the most vital assets. If you can't contact members directly, it's likely they won't renew. Overall, accurate voter lists increase the likelihood of higher turnout and reduce duplicate votes.

YesElections can help improve the accuracy of the list through a process called "deduping," which removes duplicate voters and enhances election security.

Not only will that list be necessary for your forthcoming election, but you'll need members' information to announce election and nomination dates. Be vocal. It won't hurt to distribute multiple reminders. Avoid stale messaging by leveraging the opportunity to announce upcoming events and important news, or to emphasize why voting is important.
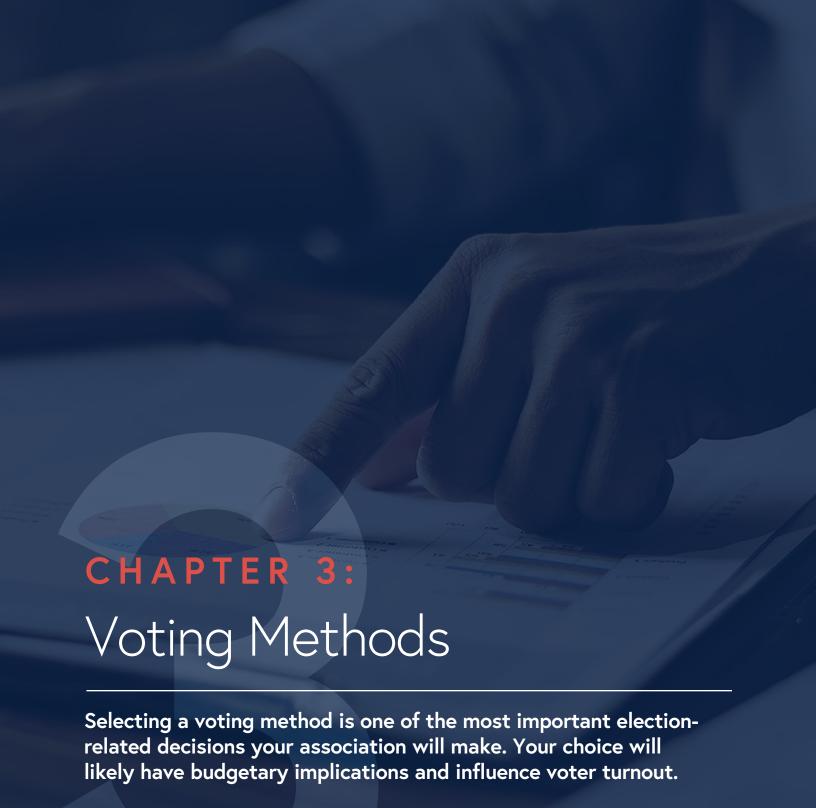
Whether you represent a union, retirement fund, financial institution, or any other member-based organization, an election requires a full-scale nomination process.

As you may already know, nominations come in many forms.

One such type includes candidates volunteering. For groups with a great number of positions to fill on the ballot, this can be cumbersome to manage. To make this process less strenuous, YesElections offers a dedicated platform designed specifically for nominations and the services that go with it. We set up a custom online form that members can fill out. Additionally, there's a customized administrator site that tracks each of the forms submitted and enables staff members to follow the progress of each all the way through the review process.

For those that instead require candidates to collect signatures, YesElections makes life easy by offering "e-signatures." This feature eliminates the need for an organization staffer to sift through piles of papers and simplifies the entire process.

From here, you'll collaborate with your election management agency to print or create e-ballots. This is where all your work verifying the eligible member list will be rewarded. While the election vendor will handle the bulk of the work going forward, your job will be to—yep, you guessed it— remind voters about the election.

Voting Methods

Selecting a voting method is one of the most important election-related decisions your association will make. Your choice will likely have budgetary implications and influence voter turnout.

Picking A Voting Method

The most common voting methods include paper, online, in person, or hybrids.

The latter allows individuals to vote using their preferred method. Of course, the most cost-effective option is internet voting, because it eliminates exorbitant printing and mailing costs, and the web is where most of your members now prefer to handle their business, increasing the likelihood of participation.

Paper Voting

Long favored by organizations because of its familiarity and perceived security, mail-in ballots have yet to be fully supplanted by online voting. Under this option, organizations have ballots designed, printed, and mailed to members, who subsequently cast their vote and return their ballot for scanning. Paper ballots can be customized to align with your organization's brand. Additionally, physical ballots are easily verifiable, meaning both organizations and members are at peace knowing votes are secure.

Online Ballots

Voting online has rapidly become the preferred method among member-based organizations.

Why? **Online voting is convenient, provides cost savings, enables social media integration, and most consequently, increases turnout.**

Let's take each of those individually. Online voting is convenient because members can vote from the confines of their own home— *or anywhere, really*—simply by logging in to vote via a computer, smartphone or tablet. Additionally, your election vendor may be able to link member portals with their systems, effectively enabling voters to cast ballots directly from your organization's site. Due to the elimination of printed ballots and mailings, online voting creates immediate cost savings. Depending on the vendor, voters may also be able to announce their participation through social share buttons on such sites as LinkedIn and Facebook.

Taken together, these aforementioned benefits create a positive election environment that leads to increased turnout—the ultimate goal for most member-based groups.

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Picking A Voting Method
(CONTINUED)

According to Nielsen, Americans spend nearly half their day interacting with media, including on smartphones, computers, and other internet-connected devices.

The increasing ubiquity of such devices, and our desire to devote even more of our time interacting with them, presents a unique opportunity for member-based groups who've been unable to previously convert members into voters.

Hybrid Voting

Voters receive a mailed paper ballot offering the option to either cast a vote by paper or via the internet. Hybrid voting is often considered the last step before groups completely transition to online voting.

On-Site Voting

Sometimes, voting in person is too hard to pass up. Hosting an election during a convention or yearly meeting enables members to have their voices heard, as well as attend educational seminars and participate in events that increase camaraderie.

Composite Voting

It's simple: Election vendors share digital ballots with members who've provided email addresses, and paper ballots to those with a physical address on file.

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CHAPTER 4:

Election Features

There's much more to elections than voting, and this is where your investment in an election agency especially begins to pay off.

As we've outlined already, successful elections require cohesion between organizations and their election vendor. But the outcome will be even more positive if the professionals have state-of-the-art technology at their disposal to achieve optimal results.

Optimizing Elections

So, what do we mean by "state-of-the-art technology?"

Well, they'd need to be equipped with the tools to handle each aspect of an election, such as:

- ✅ Nomination processing, ballot design, and mailings

- ✅ Multiple voting methods, including online, by mail, in-person voting, via telephone, and hybrid variations

- ✅ YesElections' "Web-Bridge" technology enables us to connect our secure voting site with your members' existing portal. This allows your members to vote directly on your site

- ✅ Top-tier security and secret ballots

- ✅ Result tabulations and auditable votes

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Nominations

Having a dedicated tool to collect nomination applications, publish biographies, upload images, and ultimately, manage the entire process, likely saves organizations precious time they could otherwise be spending working for their members.

Voting

The top-performing Voting Management Systems on the market today offer myriad voting options—by mail, internet, in person or via telephone—and simplify the process by establishing a virtual connection with an organization's existing site.

Security

Since we've made it to the security portion of this guide, we figured we'd take some time to flesh out why this feature is especially vital. **With single-vote verification, ballot secrecy, data protection, and ballot tracking, robust systems prevent fraud while also maintaining the integrity of elections.**

This is going to seem like a simple concept, but trust us when we say single-vote verification is a vital tool in any vendor's arsenal. Essentially, this is the process by which an election specialist cross-references a voter's ballot with a list of eligible members to ensure they only cast a single vote. Depending upon the company managing the contest, such a verification system is available regardless of the voting method. And in the rare case of a duplicate vote, only the first ballot is counted.

Ballot secrecy is exactly as it sounds. While election specialists can see *who* cast a ballot, they can't determine *how* they voted. And in an era in which people's privacy—especially digital security—is of utmost concern, trusted vendors should never share member information with third parties.

One of the most helpful tools is ballot tracking, which enables organizations to track the movement of all their ballots. For example, you'd be able to trace the entire history of a mailed ballot, from the point it left your local post office to when it was returned to the vendor for verification. The same goes for following the progress of a digital ballot.

Election Results & Audits

Vendors should provide clear and indisputable election results, issue comprehensive reports, and make recommendations to improve future elections. This enables you to knock off a couple of key boxes on your election checklist. The priority, of course, is to run a smooth and problem-free election. Analyzing results and turnout enables you to make adjustments for future contests.

Why Voting is Important

Member organizations are diverse and encompass a large swath of industries, yet they share a common trait.

Importance of Voting

Members have a stake in the success of the group.

In many cases, those who are part of such organizations pay to join, either through membership fees, union dues, or other ways, meaning, they should expect to get something positive from this relationship in return for their hard-earned dollars. That could come in the form of a more favorable union contract, improved amenities where they live, and better resources and representation. If that's the sole reason why a member votes, then that may be good enough reason as any. To have a say in who will represent you at the negotiating table, or be the public face of an organization, *is invaluable*.

Casting a ballot reinforces the sense among people that their voices are important. It also empowers people to help determine the future of their group. For associations, higher turnout means more engaged members. *Voting, by all accounts, is a win-win for everyone involved.*

What You Need To Know About Selecting An Election Partner

Hiring a reputable election vendor that can manage all aspects of an election is key to running a successful contest. With the assistance of an experienced vendor, you have more time to focus on your members.
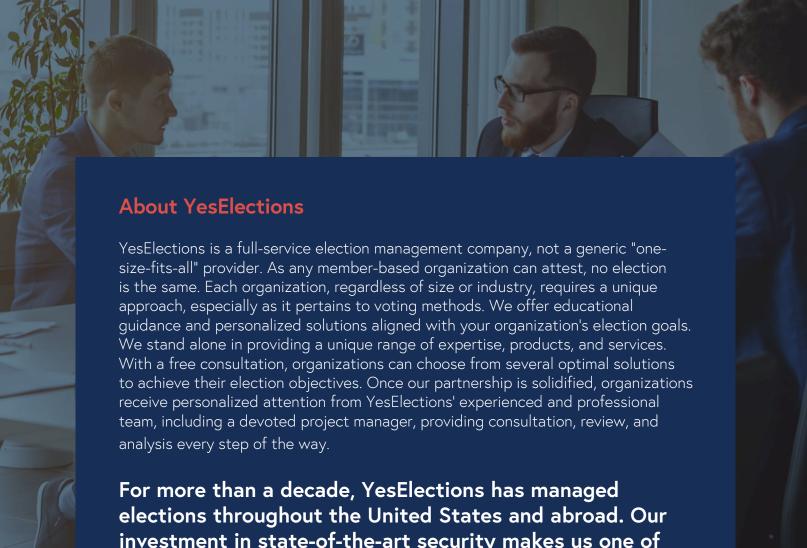
SELECTING THE RIGHT
Election Partner

- ✅ Configuration is necessary to meet your election needs. Be sure to pick a partner who fits your requirements.

- ✅ Expertise in the field of elections can help you navigate governing laws, rules, regulations, and internal organization bylaws and policies.

- ✅ Cost is always a factor in any vendor decision. It's critical to plan for efficient use of resources.

- ✅ Personal attention from a knowledgeable team of specialists, including a dedicated project manager, can guarantee election success.

- ✅ Participation can be the ultimate measure of any election. Solicit suggestions from possible partners.

- ✅ Security can be notoriously difficult to evaluate. Don't be fooled by flashy logos and automated services.

*Contact your Election Partner representative at **YesElections** today to learn how we can help optimize your election.*

(866) 514-2995

About YesElections

YesElections is a full-service election management company, not a generic "one-size-fits-all" provider. As any member-based organization can attest, no election is the same. Each organization, regardless of size or industry, requires a unique approach, especially as it pertains to voting methods. We offer educational guidance and personalized solutions aligned with your organization's election goals. We stand alone in providing a unique range of expertise, products, and services. With a free consultation, organizations can choose from several optimal solutions to achieve their election objectives. Once our partnership is solidified, organizations receive personalized attention from YesElections' experienced and professional team, including a devoted project manager, providing consultation, review, and analysis every step of the way.

For more than a decade, YesElections has managed elections throughout the United States and abroad. Our investment in state-of-the-art security makes us one of the most reliable election management agencies in the nation. To learn more about how YesElections can help your organization, request a free consultation today.

New York
155 Mineola Blvd., Suite 102
Mineola, NY 11501

Washington, DC
1775 I St NW, Suite 1150
Washington, DC 20006

California
4275 Executive Square Ste 200
San Diego, CA 92037

Phone: 866-514-2995
Email: Services@YesElections.com
Web: YesElections.com

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