Implementing the Best Practices for California Voter Guides

Making Information for Voters Easy to Understand

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Nancy Frishberg
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And partners
• Shasta County
• Santa Cruz County
• Orange County
• League of Women Voters

Workshop J at FOCE 2016
February 26, 2016
About this project

- Builds on research in 2013-2014
- Puts *Best Practices Manual* into action
- Collaboration with 3 California counties
- Continued usability testing
  and
- Sharing with all California election offices to promote best practices in the 2016 election and beyond

http://civicdesign.org/projects/how-voters-get-information/
Resources for creating voter guides

**Design guide:** notes on layout and organization of content

**Templates** for voter guide pages (Word)

**Illustrations and icons** in three formats for print, web, posters

**Election materials color palette.** A variety of coordinated colors, meeting accessibility contrast guidelines

**Clearview ADA font** and how to get the discount for election offices

**Samples materials** from around the state

**Q&A** from workshops like this one

http://civicd.link/vgres1
How voters get information:
Best practices manual for official voter information guides in California

Webinars: [http://civicd.link/BPRwebinars](http://civicd.link/BPRwebinars)

Field Guides to Ensuring Voter Intent
Design guidelines for election officials, based on solid research and best practices

Available from [http://civicdesign.org/fieldguides/](http://civicdesign.org/fieldguides/)
Continued usability testing

- 98 participants in 3 counties
- Partnered with election offices to conduct sessions
- Content based on 2014 General Elections
- Focused on
  - New or infrequent voters
  - Language access
  - Difficult voter information

A non-traditional voter helping with the usability testing at the mall.
Focused on constraints

Legal
- Present the information as required by law

Fiscal
- Aim to not increase the number of pages in the Voter packet.

Usable for voters
- Let voters express their intentions easily and quickly.

Usable for election offices
- Use familiar tools to create documents
- Use free graphics from prototypes
- Use free or low cost fonts (Clearview ADA)
5 Big Tips

Create landmarks
Make instructions visual
Keep the design uncluttered
Present languages consistently
Help voters understand measures
Create landmarks

Help voters find their way
(even in small books)
Best Practices

Include features to guide the voter

- Help readers find their way: Provide a roadmap through the whole book and on each page.
- Show readers where they are: Use headings on each page and within content.
- Use page numbers: Help readers jump to the right page quickly
- Include overview and details: Make it easy to get the main point quickly.
- Answer voters' questions
The cover sets the stage with the quick "bite" of information

Who is this from?

What, and when, is this election?

How can I get in touch?

What is this book?

Where’s my polling place?
The Table of Contents helps voters find their way

What will this help me do?

"Guide" is a generic term, but you can use "Booklet" or "Pamphlet"

Where do I start (to answer my questions)?

What's inside?

What languages are available (and what information is in my language)?
3 (or 2, or 4) ways to vote – a summary of the options for voting

3 ways to vote

**Vote by mail**
Request a vote-by-mail ballot by October 28. Return it by mail, deliver it to the Registrar of Voters office, or drop it off at any polling place on Election Day. Vote-by-mail ballots must be postmarked or delivered to a polling place by November 4. For more details, see page 7.

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**Vote early in person**
You may vote early at two locations: October 6 to November 3

*Santa Cruz County Elections Department*
701 Ocean St., Room 210
Monday – Friday, 8am to 5pm

*Watsonville City Clerk's Office*
275 Main St., 4th Floor (6th floor of the parking garage)
Monday – Thursday, 8am to 5pm
Both locations will also be open Saturday and Sunday, November 1-2, 9am to 5pm

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**Vote at the polls in person**
Polls are open on Election Day: November 4, from 7am to 8pm
The location of your polling place is printed on the back cover of this guide. Or, you can look up your polling place:
- On the web: www.votescount.com
- Call the Registrar of Voters' office at 831-454-2060
For more details, see page 9 and 11.

Hmm. There are different ways to vote?

What do I need to know about my choices?

How do I learn more?

Different top of page signals a new kind of information

Images attract and act as bullets

Center for Civic Design
What’s on the ballot shows contents and division of information

This is what I need to know!

Use an image of your cover here!

Aha! That's why there are two guides

And here's what I'm voting for

Personalize the list by ballot type
A clear start for each measure makes a clear division

- What's this called?
- What do my voting options mean?
- What am I being asked?
- Who is for or against this measure?

We will talk more about measures later
Make information visual helpful ways

Layout, illustrations, and icons to enhance text content
Best Practices

Use visual information to

- **Show the big steps in instructions.** Provide an accurate instructional illustration.
- **Identify communication types:** Signal web, phone, and so on with images.
- **Use color sparingly:** Call attention, identify languages, type of voter, or election year.
Use visuals to support instructions

I like words!

I like images!

Numbers show the steps. Bullets are like checklists.
Images help voters recognize things and places.

**How return your ballot at a drop box**

You can return your ballot using one of the 4 official ballot drop boxes. No postage is required. They are available 24 hours a day until 8pm on Election Day.

**Drop box locations**

- **Shasta County Elections Office**
  1643 Market St, Redding
  Look under the green awning at the south end of the Market Street Promenade

- **Redding City Hall**
  777 Cypress Avenue, Redding
  Look in front of the building, next to the Utility PayNant

- **Anderson City Hall**
  1887 Howard Street, Anderson
  Look in front of the building

- **Shasta Lake Community Center**
  1525 Median, Shasta Lake
  Look next to the main entrance

General Election • Shasta County • Tuesday, November 4, 2014

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**How to...**

- **Name and address**
- **Recognizable landmarks also show the exact location of the dropbox**
- **Simplified map**
Do you want to vote for President on June 7, 2016?

All voters can vote in a primary election. Voting for President depends on the party you are registered with.

If you are registered with a political party:
You can vote for a candidate running for President in that party.

If you registered with no party preference, you can vote in the Presidential primary for the following parties:
- Democratic
- American Independent
- Libertarian

You can select the party ballot at your polling place. If you vote by mail, you were sent a postcard to select a party ballot.

If you registered with no party preference and want to vote in the Presidential primary for one of the following political parties:
- Republican
- Green
- Peace & Freedom

You must re-register to vote with that party by May 23, 2016.

Register to vote online at www.registertovote.ca.gov
Icons identify types of information

On the web at www.sos.ca.gov
By phone at (800) 345-VOTE (8683)
By email at elections@sos.ca.gov

<table>
<thead>
<tr>
<th>Format</th>
<th>For</th>
</tr>
</thead>
<tbody>
<tr>
<td>.jpg</td>
<td>Printed document</td>
</tr>
<tr>
<td>.png</td>
<td>Web and screens</td>
</tr>
<tr>
<td>.tif</td>
<td>Large posters and banners</td>
</tr>
</tbody>
</table>

http://civicdesign.org/resources-for-creating-voter-guides/
Use color sparingly and consistently

Election materials color palette (for use in all print and digital applications)

### 3:1 contrast ratio

(Use for large text: titles, headings, and banners — in color on white, or white text on solid color background)

<table>
<thead>
<tr>
<th>Color Code</th>
<th>Hex Code</th>
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<th>Green</th>
<th>Blue</th>
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<tbody>
<tr>
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<td>160</td>
<td>178</td>
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### 7:1 contrast ratio

(Use for any size text — in color on white, or white text on solid color background)

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<td>R167 G37 B52</td>
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<tr>
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<td>77</td>
<td>32</td>
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<td>#51f39</td>
<td>R81 G95 B57</td>
<td>81</td>
<td>95</td>
<td>57</td>
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</tbody>
</table>

### 15:1 contrast ratio

(Use for background behind any size text to ensure text is easy to read — black text on solid-colored background)

<table>
<thead>
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<th>Green</th>
<th>Blue</th>
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<td>203</td>
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<td>231</td>
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<td>244</td>
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<tr>
<td>#5decb</td>
<td>R245 G222 B203</td>
<td>245</td>
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<td>203</td>
</tr>
<tr>
<td>#906d6</td>
<td>R224 G230 B214</td>
<td>224</td>
<td>230</td>
<td>214</td>
</tr>
</tbody>
</table>

Meets WCAG 2.0 contrast guidelines

http://civicdesign.org/resources-for-creating-voter-guides/
Uses of color for identification

For type of voter or voting option

General Election
Tuesday, November 4, 2014
All Mail precinct voter instructions

General Election
Tuesday, November 4, 2014
Vote-by-mail voter instructions

General Election
Tuesday, November 4, 2014
Polls are open from 7am to 8pm
Instructions for voting in person

For language

Voter Information Pamphlet & Sample Ballot

Consolidated Statewide Direct Primary Election • City and County of San Francisco

Folleto de Información para los Electores

Elections Municipales • Ciudad y Condado de San Francisco

選民資料手冊
Keep the design uncluttered
Best Practices

Write in plain language

- The right information: Just what voters need to take the next step
- As short as possible: Edit rigorously.
  - 1 word, not 2
  - Short sentences
  - Short paragraphs
- Organized: Use headings and white space to make the structure clear

Use design for understanding

- Layout communicates content: Reflect type of information in the layout
- Make text easy to read:
  - Large enough
  - Sans serif font
  - Upper and lower case
- Use color to support meaning:
Write in bites, snacks and meals

**Bite:** Shortest possible information

**Snack:** Summary, with enough information for an experienced voters

**Meal:** Full details or instructions

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**How to vote by mail**

You can vote by mail before Election Day. To vote by mail, you have to request a ballot. Then you can mark the ballot and send it back or drop it off at any polling place.

**How to get your vote-by-mail ballot**

You can request a vote-by-mail ballot starting on October 7. You must request a vote-by-mail ballot by October 29. Apply by doing one of the following:

- Tear off and mail back the application on the back cover page of this booklet.
- Visit [www.franklinvotes.org](http://www.franklinvotes.org) and submit a request.
- Send a letter signed by the voter that includes your address and where to send the vote-by-mail ballot.

Registrar-Recorder/County Clerk
4321 Franklin Avenue, Franklin, CA 99999

After you apply to vote by mail, you will receive your ballot within ten business days.

**How to return your vote-by-mail ballot**

Place your ballot in the official envelope, following the instructions on the vote-by-mail packet.
Explaining Primaries in California

### How to vote in a primary election

All voters can vote in the primary election.

A primary election in June chooses the candidates who will run in the General Election in November. You may see three different types of primaries on your ballot.

The way each primary works depends on the office.

<table>
<thead>
<tr>
<th>Presidential Nominated by party</th>
<th>California Top - Two Primary Nominated by voters</th>
<th>County or Local Offices Non-partisan Primary</th>
</tr>
</thead>
</table>

Who can vote in each type of primary?

- **Only voters who registered in the same political party as the candidate can vote for these offices.**
  - Some parties allow voters who registered with no party preference to vote in their primary.

Who wins? What's the result?

- **The winner of each party's Presidential primary will help select who will represent that political party in the General Election.**
  - Candidates who receive 50% plus 1 vote are elected.
  - Or, if no candidate wins, the two candidates with the most votes move on to the General Election.

Which offices are in each type of primary?

- **The candidates' party preference (or "None") always appears on the ballot.**
  - The candidates' party preference **never** appears on the ballot

### Lists of offices can be customized to each ballot

- **U.S. President**
  - U.S. Representative
  - U.S. Senator
  - Governor and Lt. Governor
  - State Senator
  - State Assembly Member
  - Other state offices including Treasurer, Secretary of State, Attorney General

- **County or Local Offices**
  - County Supervisor
  - Other county offices including Sheriff, County Clerk, Recorder - Assessor, Municipal Offices, School Districts, Superior Court Judges, State Superintendent of Public Instruction

On June 8, 2010, California voters approved the Top-Two Open Primary Act (Proposition 14). See [www.sos.ca.gov/elections/primary](http://www.sos.ca.gov/elections/primary) - [elections-california](https://www.sos.ca.gov/elections/primary) for more information.
Make the important words stand out

1. The right to vote if you are a registered voter. You are eligible to vote if you are:
   • a U.S. citizen living in California
   • at least 18 years old
   • registered where you currently live
   • not in prison or on parole for a felony

2. The right to vote if you are a registered voter even if your name is not on the list.
   You will vote using a provisional ballot. Your vote will be counted if election officials
determine that you are eligible to vote.

3. The right to vote if you are still in line when the polls close.

4. The right to cast a secret ballot without anyone bothering you or telling you how to vote.

5. The right to get a new ballot if you have made a mistake, if you have not already
cast your ballot. You can:
   
   Ask an elections official at a polling place for a new ballot; or
   Exchange your vote-by-mail ballot for a new one at an elections office, or at your polling
   place; or
   Vote using a provisional ballot, if you do not have your original vote-by-mail ballot.
Help voters understand measures
Help voters read measures

Voters said that they "always read" this page even though it's a newly designed page.

It's just enough information for them to get started, and have some context for the pages that follow.
Start with the ballot question

Show voters what they will be asked on the ballot, first.

If you translate only the ballot question, include the translation on the first page.
Order of the elements

Recommended order

1. Overview:
   - Ballot title and question
   - What your vote means
   - List of who is for/against

2. Impartial Analysis
3. Financial Impact

4. Arguments
5. Replies

6. Full text
Use page numbers

Voters use page numbers, even in small booklets!

The problem:
Consecutive page numbers can be difficult if you build ballot styles by assembling individual pages.

The solution
Use "chapter numbering" for Measures
Present languages consistently
Make it easy to figure out where in-language information is available
Make it easy to find each language

- **Be consistent.** Set up a pattern and stick with it.
- Choose a pattern that works for the requirements in your county.
Options for languages

- Separate books
  - When there are more than two languages, or the booklets are large

- Separate sections
  - With the sample ballot in the middle
  - Bilingual back cover fors

- Same page
  - Left/right or top/bottom

- Facing pages
  - English on the right, translation on the left
Partial language support is the most difficult layout

Santa Cruz translates

- Voter information (8 pages)

But then...

- Ballot questions (provided at polling place)
- Required ballot/candidate information
- Candidate statements as supplied by candidates
"Ways to vote" pages can be an "anytime" pamphlet

It can be useful as part of your community outreach for new voters:

- Give to voters when they register
- Hand out to people about to be eligible (because of age, citizenship status).
- Provide official (accurate) information.
- Expand on the basic voter rights with accurate information for your county.
- Make an attractive cover that welcomes new voters, and lists the information included

<table>
<thead>
<tr>
<th>Possible pages in the booklet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover and TOC</td>
</tr>
<tr>
<td>California Voter Bill of Rights</td>
</tr>
<tr>
<td>3 ways to vote in &lt;this&gt; County</td>
</tr>
<tr>
<td>How to vote early</td>
</tr>
<tr>
<td>How to vote by mail</td>
</tr>
<tr>
<td>How to vote at the polls</td>
</tr>
<tr>
<td>How to vote by electronic ballot</td>
</tr>
<tr>
<td>Accessible voting</td>
</tr>
<tr>
<td>Language assistance</td>
</tr>
<tr>
<td>Check your voter registration status</td>
</tr>
</tbody>
</table>
Extra innings

Recommendations vs. election code
# Recommendations vs. Election Code

<table>
<thead>
<tr>
<th>Is it...</th>
<th>Or...</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voter Guide</td>
<td>Voter Information Pamphlet and Sample Ballot</td>
<td>Official title on the cover, but refer to the &quot;Guide&quot; or &quot;Pamphlet&quot; for short</td>
</tr>
<tr>
<td>Practice Ballot</td>
<td>Sample Ballot</td>
<td>Use the title &quot;Sample Ballot&quot; but add a sentence in the margin that suggests how to use it</td>
</tr>
<tr>
<td>Reply to the Argument...</td>
<td>Rebuttal to the Argument...</td>
<td>Reply Rebuttal to the Argument...</td>
</tr>
<tr>
<td>Yes/No explanations on first page</td>
<td>Only in the context of the Impartial Analysis</td>
<td>Copy the text, but leave it in the analysis text. Ask counsel to write this explanation, if it's not already available.</td>
</tr>
<tr>
<td>Use a signature to show you are &quot;real&quot;</td>
<td>Or is that campaigning?</td>
<td>Ethics guidance says that you should not use your signature if you are an elected Clerk/ROV</td>
</tr>
</tbody>
</table>

Follow the law, but add plain language to help voters. Then, let's get the Code changed, when we can.
Thanks!
Thanks to

**Our funders and partners**
- Irvine Foundation and the Future of California Elections
- League of Women Voters of California Education Fund
- Shasta, Santa Cruz and Orange Counties
- Our colleagues at Oxide Design

**And you!**
- For spending time learning about how to improve your Voter Guide.