Ranked choice voting in runoffs for overseas voters

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Ranked choice voting ballot design for runoffs

This project explored design and instructions that will help overseas voters understand how their ballot will be used in the first general or primary election, and then in a runoff.

We tested layouts, instructions, and definitions

Writing definitions

Runoffs are unusual elections that occur under specific circumstances. We needed to know how to covey this complexity in a few sentences.

Designing the layout

Layouts must convey both the primary election and a possible runoff, if it occurs. We needed to know how to design a layout that told voters they were voting in both elections.

Writing clear instructions

Instructions must both explain how to mark the ballot in a way that reinforces the runoff concept. We needed to know how to write these so voters marked the ballot correctly.

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Explaining the runoff concept

We tested drafts of runoff definitions and placed them at different places to see what resonated most.

Runoffs occur when no candidate gets more than 50% of the vote. We wanted voters to know this ballot allowed them to vote in that runoff if it happened. One participant said it was like "advance voting."

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Designing the layout

This ballot represents two elections in one. The layout needed to clearly convey to participants how the two elections were connected.

We used best practices from previous ranked choice ballot studies, such as a grid for marking the ballot.

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Writing clear instructions

We relied on best practices from previous ranked choice voting research to inform voter instructions on this ballot. While the context for a runoff is slightly different, many of the text and illustrated instructions were appropriate.

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The design challenge is to help overseas voters understand how their ballot will be used in a first election, and then in a runoff, if one occurs.

Feedback from participants revealed that there isn't one perfect ballot design. Rather, their feedback revealed a set of design insights to follow that meet the unique needs of overseas voters.

How we ran the test sessions

The testing procedure included a detailed interview about the voter's experience voting overseas. Then we tested two ballot designs.

To recruit for the testing, we started with a survey

To find participants, we cast a wide net across social media to find Americans voting from overseas.

- Our goal was 50 participants; over 75 completed the survey
- Participants were employees working for international companies, spouses, and a few students. Many were former Peace Corps volunteers.
- Participants were invited to opt-in for a longer interview over Zoom at the end of the survey.

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Who we selected

From the list of survey participants that opted in, we reached out and prioritized people who:

- Were from runoff states. This was difficult, as the only runoff state participants were from Illinois.

- Lived in places other than large international cities. We wanted to hear about the challenges of voting in less Westernized places.

- Had already been through the process

17 participants

- Voted in Illinois, Oklahoma, Wisconsin, Texas, Ohio, Colorado, Florida, Connecticut, Michigan, Georgia, California, New York, Pennsylvania, and Arizona.

- Lived in Australia, Mexico, Holland, Hong Kong, Fiji, Finland, Thailand, Vietnam, Morocco, Bosnia and Herzegovina, Kenya, Peru, Rwanda, Berlin, Australia, and London.

- Ranged in age from early 20s to late 70s

- 13 White, 2 Latinx, 1 South Asian, 1 Black

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What we asked

First, we asked about why they were living overseas

A set of casual, introductory questions gave participants a chance to share why they chose to live overseas and why they think voting is important.

Then, we asked about a recent experience voting

Participants described in detail the steps they went through to vote. They talked about challenges the faced and how they found information about the process if they were stuck. They also described how they participate in US politics from overseas.

Finally, we shared two different ballot designs

After asking to describe how they thought a runoff worked, participants pretended to fill out a sample ballot. We asked them to think aloud as they did and tell us what was confusing. We had them compare the ballots and tell us which one they preferred.

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Iterative testing of RCV ballot prototype

We learned about specific ballot design challenges voters pointed out. We also learned about the larger challenges of voting overseas.

- Design insights were paired with insights about the voter experience to inform ballot iterations.

- 7 variations of ballot designs were designed based on participant feedback.

Our iteration process

Our first tests with participants revealed strong opinions about the two elections being conveyed on 1 or 2 pages. Then, we focused on improving how voters could understand everyone one 1 page. Finally, we worked on fine tuning language.

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First, we learned about layouts

Participants had strong opinions about how the runoff was presented. One ballot placed everything on 1 page, while the other used 2 pages to represent two elections.

- One participant missed the second page entirely.
- Some participants liked having all the instructions at the beginning rather than separated between two pages.
- All participants understood the grid marking system and illustrated marking instructions.
- Some participants had questions around how the second, etc. choices would be counted. Later, they answered their own questions by reading more carefully.
- On the two page ballot, some participants were confused that you had to enter your first choice again.
- One participant suggested graphically indicating the runoff as a separate election.

What we changed

- Relocated "turn to page 2" to make it more visible.
- Separated the runoff election from the first choice on the 1 page ballot.
- Improved explanation of runoff
- Introduced the idea of "steps."

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Then, we focused on 1 page

Participants showed an improved understanding of the runoff in our reworked 1 page version. We made few changes to the 2 page version.

- Learned that many overseas voters have seen ranked choice voting used in other places. In some cases, it's used where they live. These participants immediately understood what was going on.
- Warning voters that their vote "might not count" made them think there was a bigger problem.
- Learned how much work voters went through in order to cast their ballots. They wanted to know this would save them time in the future.
- Noticed participants skipping the definition of the runoff at the top of the page. They often read it later when they realized they had questions.

What we changed

- Explained the benefits of this ballot and why it would save time and hassle.
- Explained that this ballot would make sure their vote counted, rather than a negative scenario.
- Bolded the instructions that explained voters didn't need to mark all choices.
- Widened the dividing line between the two elections on the 1-page version and added more explanation of the two steps.
- Explained the "two step" process at the beginning, but put the details of the runoff later.

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Lastly, we paid attention to details

At this point, we understood that almost an equal number of participants liked the 1 and 2-page ballot versions. With the two different layouts largely understood, we moved our attention to details – in particular, language edits.

- Participants questioned "vote as you normally would." They wondered what normal was.
- We also learned that overseas voters have lots of trouble printing ballots that are odd sizes. They worry that resizing the ballot may cause errors when it's processed back in their home state.

Final Version

- Edit and improve the language of the runoff.
- Replace "vote as you normally would" with "vote for your first in the first election."
- Replace step 2 instructions with "rank your additional choices in case there's a runoff."
- Make the ballot fit an A4 size sheet of paper.
- Be more explicit in language about not having to request another ballot.

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How we conducted the sessions

Before showing participants the ballot prototypes. we spent 20-30 minutes asking about their overseas voting experience.

Questions were framed in 4 different sections. They were:

- Where they're coming from
- Getting informed
- Deciding how to take part
- Voting and checking results

Where are they coming from?

We wanted to know why they chose to live overseas and why they think voting is important. We asked questions like

- What state do you vote in? If they were from a runoff state, we noted that.
- Why do you live overseas and how long have you been doing so?
- Why is voting important to you?

An insight we learned

Meeting people who don't have a voice inspires voters. One participant explained that living in a developing country where people don't have a voice gave them perspective around how important it is to get involved when you can.

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Getting informed

We wanted to know what overseas voters do to prepare and learn about an upcoming election even though they aren't living in the US. We asked questions like:

- When and how did you hear about the election you voted in?
- How did you find out what was on the ballot?
- Who do you discuss US politics with?

An insight we learned
Good relationships with your local clerk builds trust. It makes it easier to vote even when you're overseas. One voter was even friends with their clerk on Facebook.

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Deciding how to take part

We wanted to hear about the logistical details of being able to vote overseas? What hoops did they jump through? We asked asked questions like:

- Are you registered to vote? How do you know?
- In detail, describe wow did you go about getting your ballot the last time you voted.
- Have you voted in another overseas place? If so, how were things different?

An insight we learned

Election clerks, when mailing a ballot or other material to an overseas voter, require a mailing address. This, however, is a western concept that doesn't function everywhere. One participant explained "my address is the intersection of these two streets where the mango tree used to be."

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Voting and checking results

We wanted to hear what the act of voting was like and what happened next. We asked questions like:

- What do you think happens after the ballot leaves your hands?
- How do you know the election office received and counted your ballot?
- How do you check election results?

An insight we learned

Overseas voters go through a lot of effort to vote – sometimes for nothing. A voter in Peru spent a good deal of her own money to get her ballot out on the date her ballot indicated. It ended up not being counted for an election she was really serious about, which was frustrating.

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Ballot review

We intentionally did not to explain the runoff concept to participants before showing them the ballot.

Because the ballot was designed as an educational tool as well as a ballot, we needed to test if participants understood the runoff concept without our help.

- We asked if they were familiar with a runoff.
- Then, we asked participants to define the term in their own words.

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Ballot review

Next, participants were asked to refer to the 2 ballots we had emailed beforehand.

We provided a scenario in which this ballot had arrived and they were preparing to mark their ballot. We asked them to pretend they were familiar with the candidates.

- We asked them to begin working through the ballot and think aloud as they interpreted the instructions and marked the ballot.

- After they were done, we asked them specific questions that provided feedback on the ballot design.

- We repeated this process for Ballot B.

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What the participants looked at
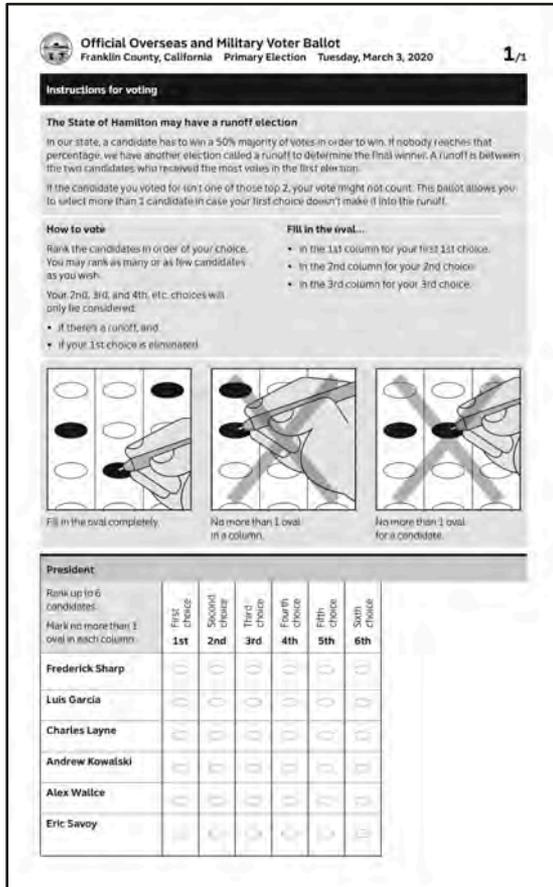
Early prototype,
Ballot A
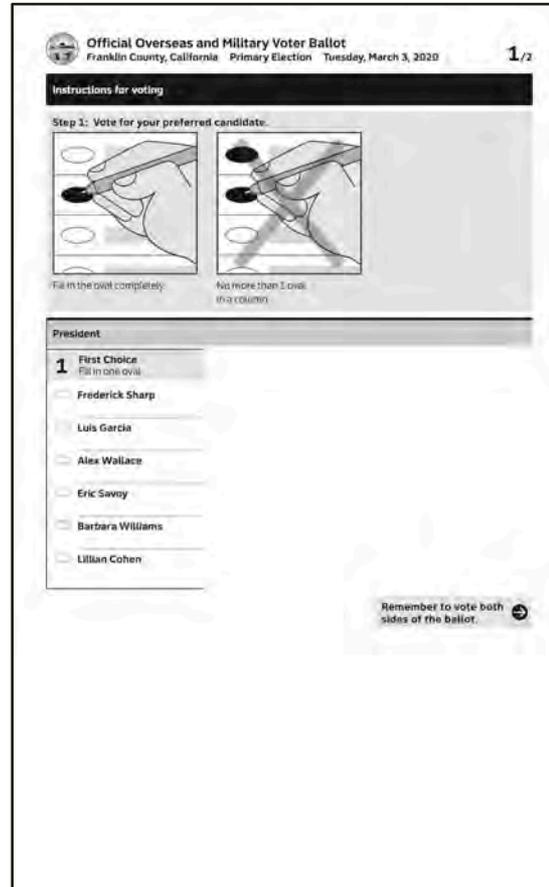
Early prototype,
Ballot B, page 1
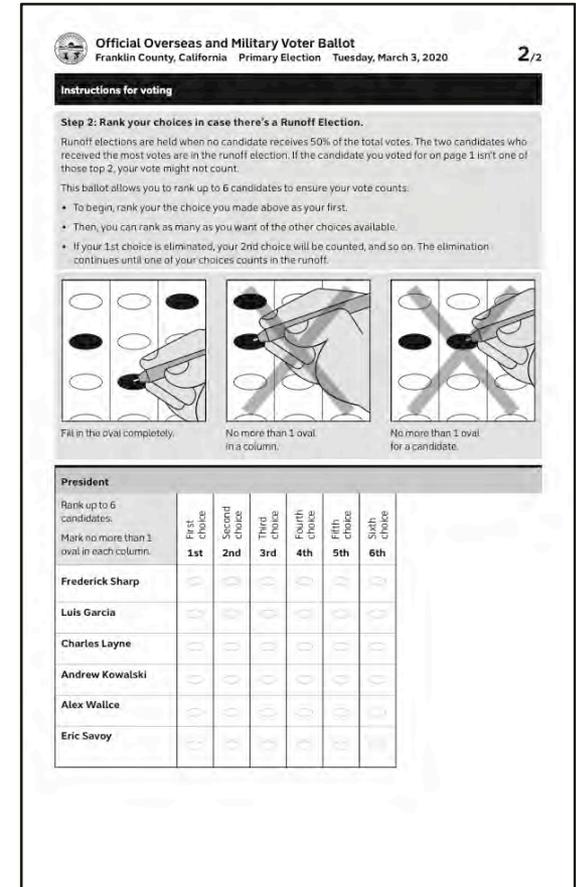
Early prototype,
Ballot B, page 2

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Ballot review debrief

After focusing on each ballot individually, we asked participants to reflect on the ballots together. We asked:

- If one of the ballot designs was preferable. If it was, we asked why.
- What ideas they had for improving them.

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A deeper dive into the design details

What we learned from testing the ballots and those insights mean when designing runoff ballots.

What this study confirmed: some of the design decisions used in the prototype ballots came from previous research.

The best practices referenced here came from [Best practices for ranked choice voting ballots and other materials](#), available on the Ranked Choice Voting Resource Center website.

Give voters the information they need to prepare to vote

- Explaining the concept of ranked choice voting helps voters make confident choices.
- Having clear instructions that explained how and why a runoff might occur was essential.
- Participants who took time to read instructions had a clear understanding of why there was a second step or page in these ballot designs.

Present all information in clear, simple language

- The complicated mechanics of the runoff meant clear, simple language was necessary.
- While many participants could guess at what a runoff meant, they had a hard time understanding in the context of their ballot. We reworked this language several times before getting it right.

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Using best practices for ballot design

- Using typography to make the ballot easy to read helped participants understand this unique ballot design.
- Ballots tested in this study used visual design to attract attention and separate the different "elections."
- They combined clear typography with strong visual separations that communicated the runoff concept without words.

Include clear, concise instructions that help voters avoid errors

- The ballots tested in this study reused marking instructions from previous ranked choice ballots.
- Participants had particular questions around how many candidates to rank, and these instructions helped answer their questions.
- Illustrated instructions, reused from previous work, continued to be successful.

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A grid marking system continued to be successful

- Both ballot designs used the grid to allow participants to select their choices.

- Participants didn't need clarification on how to mark their choices.

- One participant described that their eyes went directly to the grid, and that it visually communicated that this ballot would allow several choices.

President						
Rank up to 6 candidates. Mark no more than 1 oval in each column.	First choice 1st	Second choice 2nd	Third choice 3rd	Fourth choice 4th	Fifth choice 5th	Sixth choice 6th
Frederick Sharp	⬭	⬭	⬭	⬭	⬭	⬭
Luis Garcia	⬭	⬭	⬭	⬭	⬭	⬭
Alex Wallace	⬭	⬭	⬭	⬭	⬭	⬭
Eric Savoy	⬭	⬭	⬭	⬭	⬭	⬭
Barbara Williams	⬭	⬭	⬭	⬭	⬭	⬭
Lillian Cohen	⬭	⬭	⬭	⬭	⬭	⬭

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Design insight: be clear this ballot is for two elections

Participants needed strong visual cues to separate the elections. They also needed clear language.

Be clear this ballot is for two elections: issue

More than where the explanation of a runoff occurred or how the ranked choice voting process worked, participants wanted to understand this ballot was allowing them to vote in two elections.
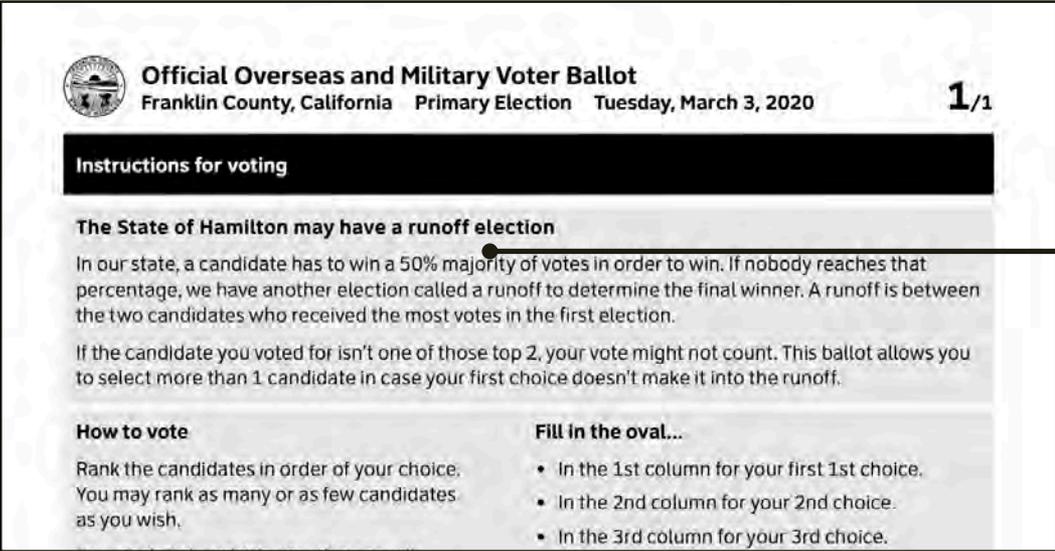
First iterations confused participants by warning their votes wouldn't count. Even though the runoff concept was explained at the top of the page, it still wasn't clear why.

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Be clear this ballot is for two elections: solution

Using the concept of "steps" helped participants understand the two parts of the ballot were connected. This helped them understand that the runoff was circumstantial.

In both 1 and 2 page versions, participants responded well to short phrases.

Step 1: Vote for your choice in this election (or the primary)

Step 2: Rank your additional choices in case there's a runoff

A heavy black line helped provided a visual cue

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Be clear this ballot is for two elections: solution

4 participants clearly stated in the debrief that placing the steps on separate pages helped them understand they were voting in two elections.
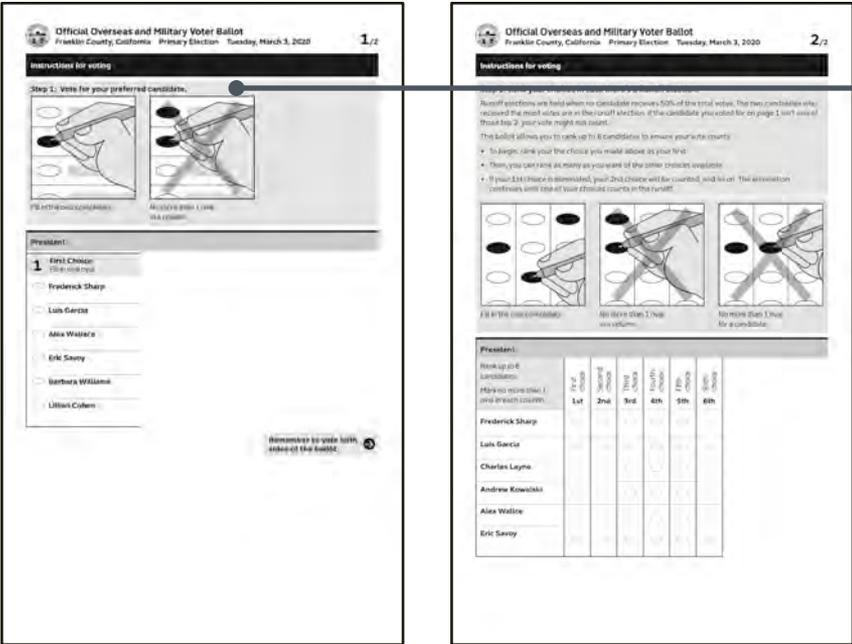
Steps were labeled at the top of each page. Two pages meant two separate actions.

"It allows you to mimic the process an [in person] voter would go through."

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Be clear this ballot is for two elections

Designers can't assume overseas voters from states that have runoffs already understand they may have a second election.

"[Voting from overseas] feels like you're trying to cram for a final exam in high school when you haven't slept."

One participant explained that the process of getting informed about a context, state, and country you no longer live in is difficult. "Because you're not there, you aren't hearing about issues the same way. You don't hear people talking about things on the street, and it can be hard to be informed when it's time to vote."

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Design insight: too much white space and odd paper sizes cause problems

Participants shared concerns that files had not downloaded correctly or that print shops might make mistakes.

Too much white space and odd paper sizes cause problems: issue

In the two-page version of the a ballot, the first race is so simple it only occupies a small portion of the page. The large amount of white space worried some participants.

The size of the paper doesn't fit on A4. When it prints, it gets distorted.

One participant moved so quickly, they didn't see the second page.

Blank space left participants were concerned that something hadn't printed correctly or the file was corrupt.

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Too much white space and odd paper sizes cause problems: solution

Redesign 2-page ballot to fit on A4 paper.

A4 size ballot puts each election on each page.

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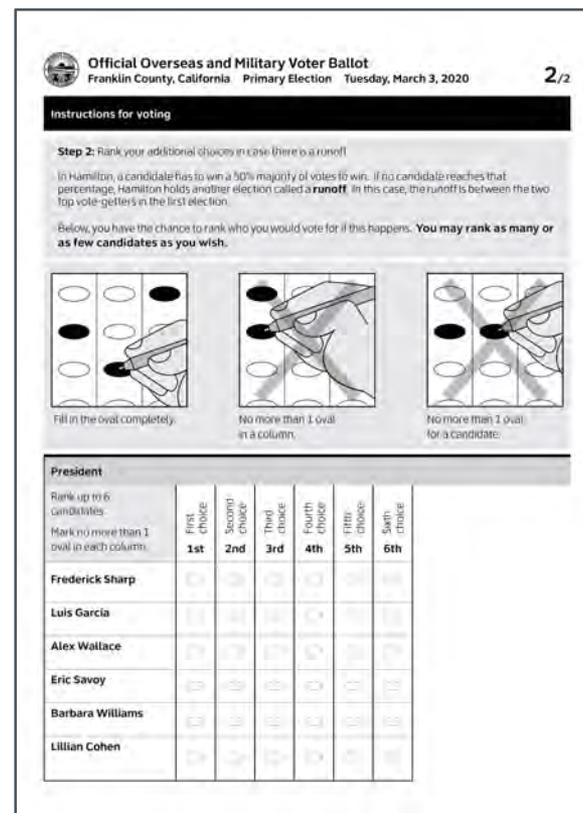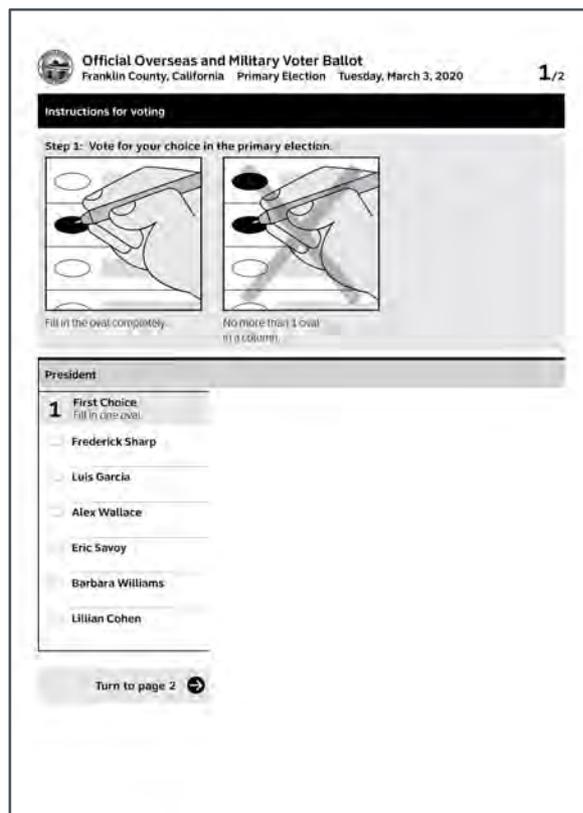
Too much white space and odd paper sizes cause problems

Some of the overseas voters we spoke with question the validity of the ballots they receive. Printing is also hard.

One voter said that "you do your part and hope you get back the ballot you need." Another person voting from Hanoi said the ballot her clerk sent from Connecticut didn't even look like a real ballot.

When it comes to printing, several overseas voters we spoke to had to cross town to get to a print shop. Ballots that require specific printing instructions can be hard to explain if voters aren't fluent in a local language. They are also worried about handing over such a sensitive file. One participant who resized her ballot to fit on an A4 was afraid it would cause an error when read by the scanner at her clerk's office.

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Design insight: indicate how this ballot saves time and hassle

Overseas voters responded well to language that explained the benefits of this ballot design.

Indicate how this ballot saves time and hassle: issue

The overseas voters we spoke with were tough voters, often going to great lengths to participate in American elections. Indicating that this ballot is designed so that they won't have to go through the process again was well received by participants.

> **The State of Hamilton may have a runoff election**
>
> In our state, a candidate has to win a 50% majority of votes in order to win. If nobody reaches that percentage, we have another election called a runoff to determine the final winner. A runoff is between the two candidates who received the most votes in the first election.
>
> If the candidate you voted for isn't one of those top 2, your vote might not count. This ballot allows you to select more than 1 candidate in case your first choice doesn't make it into the runoff.

Early iterations expected voters to infer that they won't need to request another ballot.

One participant said they wanted to see language that let them know "this ballot is going to help fix or solve the problem."

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Indicate how this ballot saves time and hassle: solution

In this iteration, participants were relieved and pleased to know their situation was being accounted for.

(this is called a runoff and is explained below).

This ballot allows you to make a choice in case that second election occurs. Doing so means **you won't have to request another overseas ballot.**

How to vote   **Fill in the oval...**

It turned out we need to explicitly say "Doing so means you won't have to request another overseas ballot." Making it bold helped, too.

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Indicate how this ballot saves time and hassle

We heard multiple stories about the difficulty and confusion overseas voters face when they try to vote. A ballot designed to lessen this confusion acknowledges their struggle.

A voter in Morocco described walking across town to the post office, where they waited an hour to pay the postage for their ballot to be mailed back to the US. Several voters described paying extra money for special postage that they thought was more secure. Two participants said they gave their ballots to friends who were on their way back to the US. Another participant felt that it didn't seem like whoever managed their state's elections cared much about non-military voters. They said "It always seems like the overseas voters are always third in rank."

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Design insight: explain the runoff as clearly as possible

Even participants from runoff states didn't always know what a runoff meant.

Explain the runoff as clearly as possible: issue

Some participants skipped over the runoff explanation.

Official Overseas and Military Voter Ballot
Franklin County, California   Primary Election   Tuesday, March 3, 2020   **1**/1

Instructions for voting

The State of Hamilton may have a runoff election

In our state, a candidate has to win a 50% majority of votes in order to win. If nobody reaches that percentage, we have another election called a runoff to determine the final winner. A runoff is between the two candidates who received the most votes in the first election.

If the candidate you voted for isn't one of those top 2, your vote might not count. This ballot allows you to select more than 1 candidate in case your first choice doesn't make it into the runoff.

How to vote

Rank the candidates in order of your choice. You may rank as many or as few candidates as you wish.

Your 2nd, 3rd, and 4th, etc. choices will only be considered:

Fill in the oval...

- In the 1st column for your first 1st choice.
- In the 2nd column for your 2nd choice.
- In the 3rd column for your 3rd choice.

An early version of the single page ballot put the runoff description with the introduction. Some participants missed it entirely.

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Explain the runoff as clearly as possible: solution

Put instructions where voters need them.

(from the Center for Civic Design's Field Guides for Ensuring Voter Intent: Vol. 2)

Step 2: Rank your additional choices in case there is a runoff

In Hamilton, a candidate has to win a 50% majority of votes to win. If no candidate reaches that percentage, Hamilton holds another election called a **runoff**. In this case, the runoff is between the two top vote-getters in the first election.

Below, you have the chance to rank who you would vote for if a runoff occurs.

choice	Second choice	Third choice	Fourth choice	Fifth choice	Sixth choice
st	2nd	3rd	4th	5th	6th
◯	◯	◯	◯	◯	◯
◯	◯	◯	◯	◯	◯

In a later version, the runoff explanation is placed with the instructions for Step 2.

While some clerks add instructions as a separate insert or file, it's safer to minimize the amount of files in case they get lost or overlooked.

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Explain the runoff as clearly as possible

Participants were worried about language that said "their vote might not count."

Early iteration

In your state, a candidate has to win a 50% majority of votes in order to win. If nobody reaches that percentage, your state runs another election called a **runoff** to determine the final winner. A runoff is between the two candidates who received the most votes in the first election.   If the candidate you voted for isn't one of those top 2, your vote might not count.

Final version

In Hamilton, a candidate has to win a 50% majority of votes to win. If no candidate reaches that percentage, Hamilton holds another election called a **runoff**. In this case, the runoff is between the two top vote-getters in the first election.

Below, you have the chance to rank who you would vote for if a runoff occurs. Doing so **ensures that your vote will count.**

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Explain the runoff as clearly as possible

During the interview, we asked participants what they thought a runoff meant. Their responses varied.

"I think it's a roster of available options."

"In my mind, it's when according to the rules of the election, the leading candidates don't have a certain number of votes."

"When a candidate is so far ahead it doesn't make sense to vote for another candidate."

"When there's been a clerical error that happens during the counting of votes."

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Design insight: be clear that voters don't have to mark all choices

At least five participants asked questions about whether they had to mark all six choices.
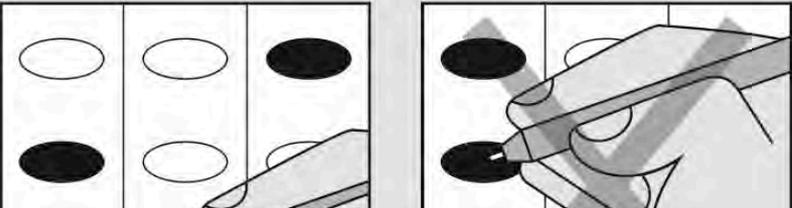
Be clear that voters don't have to mark all choices: issue

The language we used was clear, but where we placed it made a difference.

the two candidates who received the most votes in the first election.

If the candidate you voted for isn't one of those top 2, your vote might no
to select more than 1 candidate in case your first choice doesn't make it

How to vote

Rank the candidates in order of your choice. You may rank as many or as few candidates as you wish.

Your 2nd, 3rd and 4th, etc. choices will only be considered:

- if there's a runoff, and
- if your 1st choice is eliminated

Fill in the oval...

- In the 1st column
- In the 2nd colum
- In the 3rd colum

Participants missed the instruction in early versions.

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Be clear that voters don't have to mark all choices: solution

Step 2: Rank your additional choices in case there is a runoff

In Hamilton, a candidate has to win a 50% majority of votes to win. If no candidate reaches that percentage, Hamilton holds another election called a **runoff**. In this case, the runoff is between the two top vote-getters in the first election.

Below, you have the chance to rank who you would vote for if this happens. **You may rank as many or as few candidates as you wish.**

Second choice	Third choice	Fourth choice	Fifth choice	Sixth choice
2nd	3rd	4th	5th	6th

Placing the ranking instructions in bold and close to where the ranking occurred was helpful.

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Final versions

Two options for overseas runoff ballots

The ideal experience

We learned a lot about what works and what doesn't about this particular type of ballot design. In an ideal world, an overseas voter would:

1. Notice that this particular ballot was two steps instead of one.
2. Feel relief that this ballot will save them time if a runoff occurs
3. Vote for their first choice
4. Read and understand what a runoff means
5. Rank their choices if a runoff occurs

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Recipe for a 1- page runoff ballot

7 participants out of 17 said they preferred a 1-page ballot.

"I like how it's broken down, the two steps close together. I like this one better because it's easier to read --- two separate actions."

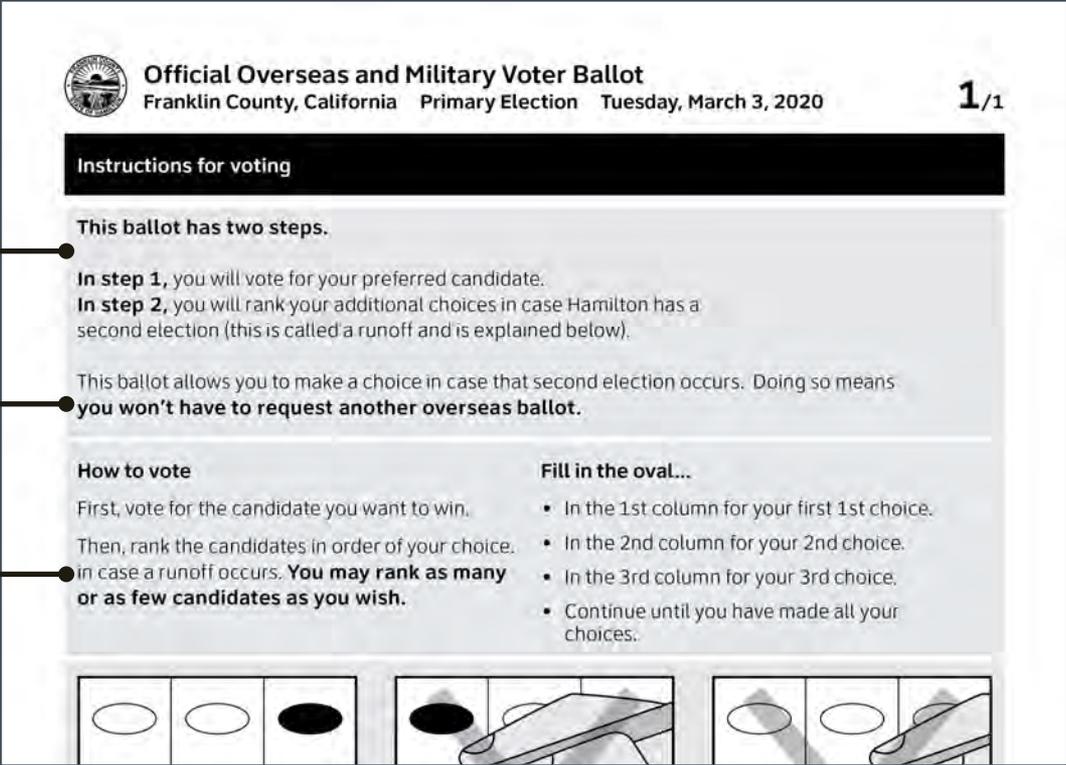Long 8.5" x 17" ballot has room for both "steps."
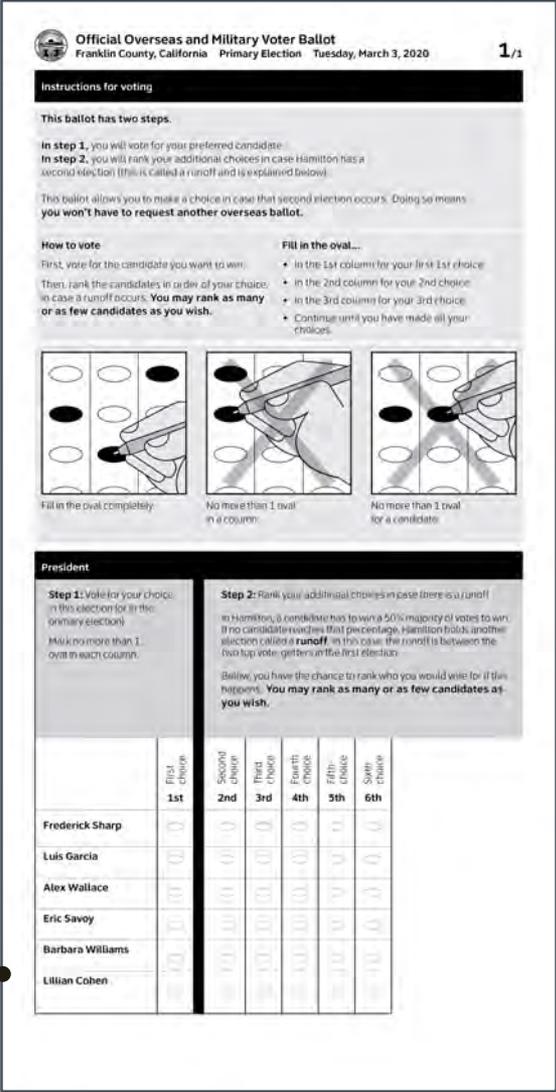
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Recipe for a 1- page runoff ballot

7 participants out of 17 said they preferred a 1-page ballot.

Two elections represented as two steps.

Explicit reminder that this ballot makes voting easier.

Ranking instructions for second step.

Official Overseas and Military Voter Ballot
Franklin County, California   Primary Election   Tuesday, March 3, 2020
1/1

Instructions for voting

This ballot has two steps.

In step 1, you will vote for your preferred candidate.
In step 2, you will rank your additional choices in case Hamilton has a second election (this is called a runoff and is explained below).

This ballot allows you to make a choice in case that second election occurs. Doing so means you won't have to request another overseas ballot.

How to vote

First, vote for the candidate you want to win.

Then, rank the candidates in order of your choice, in case a runoff occurs. You may rank as many or as few candidates as you wish.

Fill in the oval...
- In the 1st column for your first 1st choice.
- In the 2nd column for your 2nd choice.
- In the 3rd column for your 3rd choice.
- Continue until you have made all your choices.

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Recipe for a 1- page runoff ballot

7 participants out of 17 said they preferred a 1-page ballot.

Illustrations borrowed from previous RCV research.

Primary election represented as "Step 1."

Runoff explanation and instructions. Repeated ranking instructions from above.

Fill in the oval completely.

No more than 1 oval in a column.

No more than 1 oval for a candidate.

President

Step 1: Vote for your choice in this election (or in the primary election)

Mark no more than 1 oval in each column.

Step 2: Rank your additional choices in case there is a runoff

In Hamilton, a candidate has to win a 50% majority of votes to win. If no candidate reaches that percentage, Hamilton holds another election called a **runoff**. In this case, the runoff is between the two top vote-getters in the first election.

Below, you have the chance to rank who you would vote for if this happens. **You may rank as many or as few candidates as you wish.**

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Recipe for a 1- page runoff ballot

7 participants out of 17 said they preferred a 1-page ballot.

Heavy dividing line signifies two separate elections.

Grid borrowed from previous RCV research.

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Recipe for a 2- page runoff ballot

5 participants out of 17 said they preferred a 2-page ballot.

"it allows you to mimic the process a voter would go through"

A4 size ballot puts each election on each page.
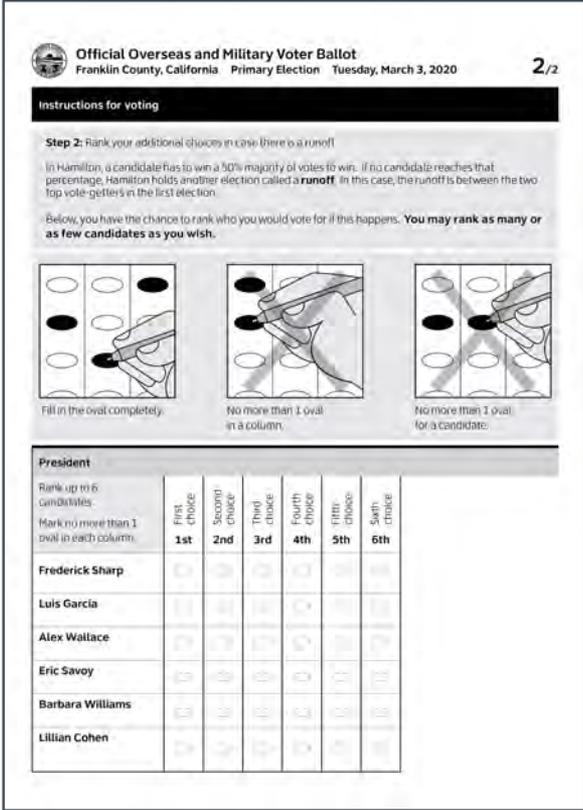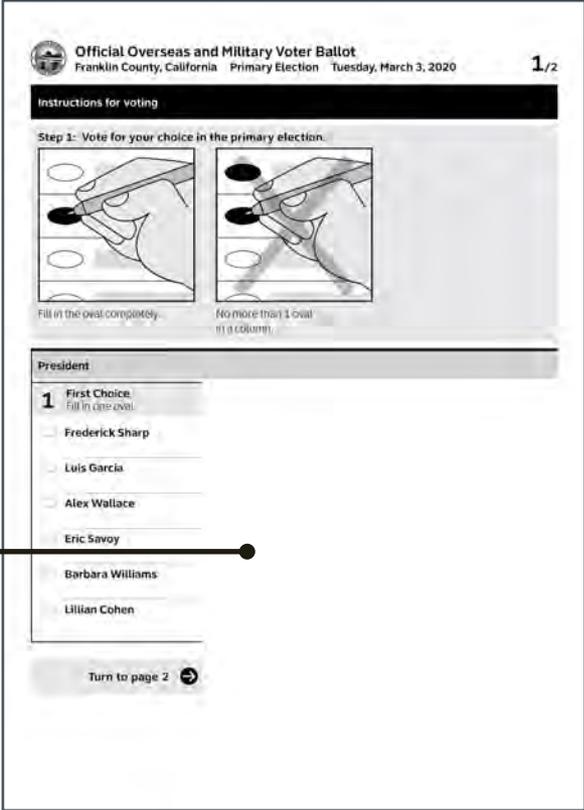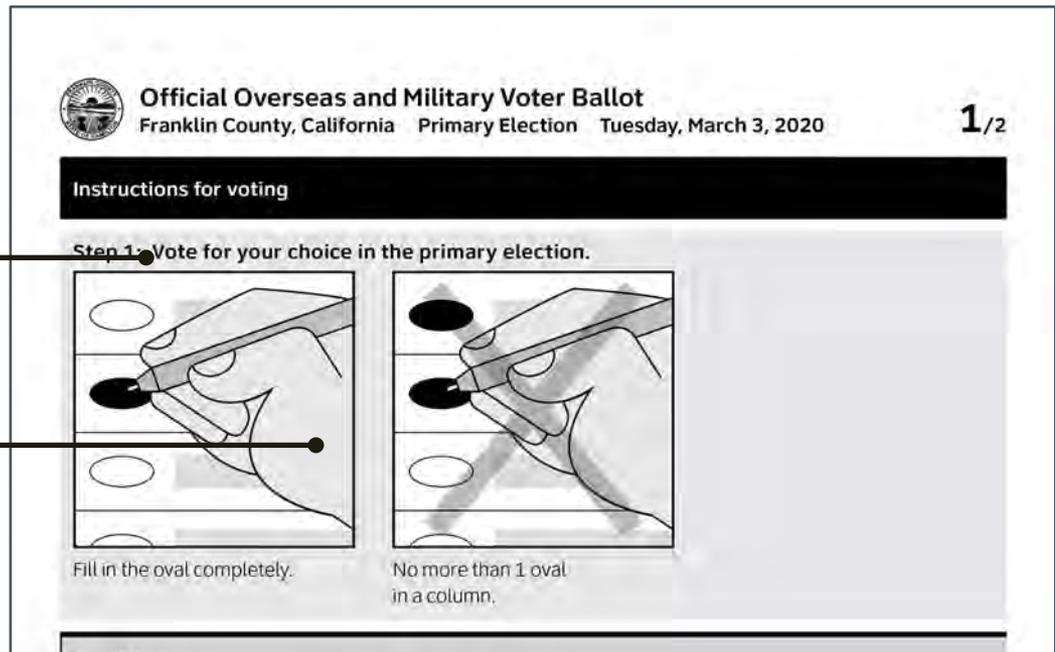
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Recipe for a 2- page runoff ballot

5 participants out of 17 said they preferred a 2-page ballot.

Voters first see Step 1 and vote as they normally would.

Illustrations borrowed from previous research.

Official Overseas and Military Voter Ballot
Franklin County, California   Primary Election   Tuesday, March 3, 2020
1/2

Instructions for voting

Step 1: Vote for your choice in the primary election.

Fill in the oval completely.

No more than 1 oval in a column.

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Recipe for a 2- page runoff ballot

5 participants out of 17 said they preferred a 2-page ballot.

Marking borrowed from previous research.

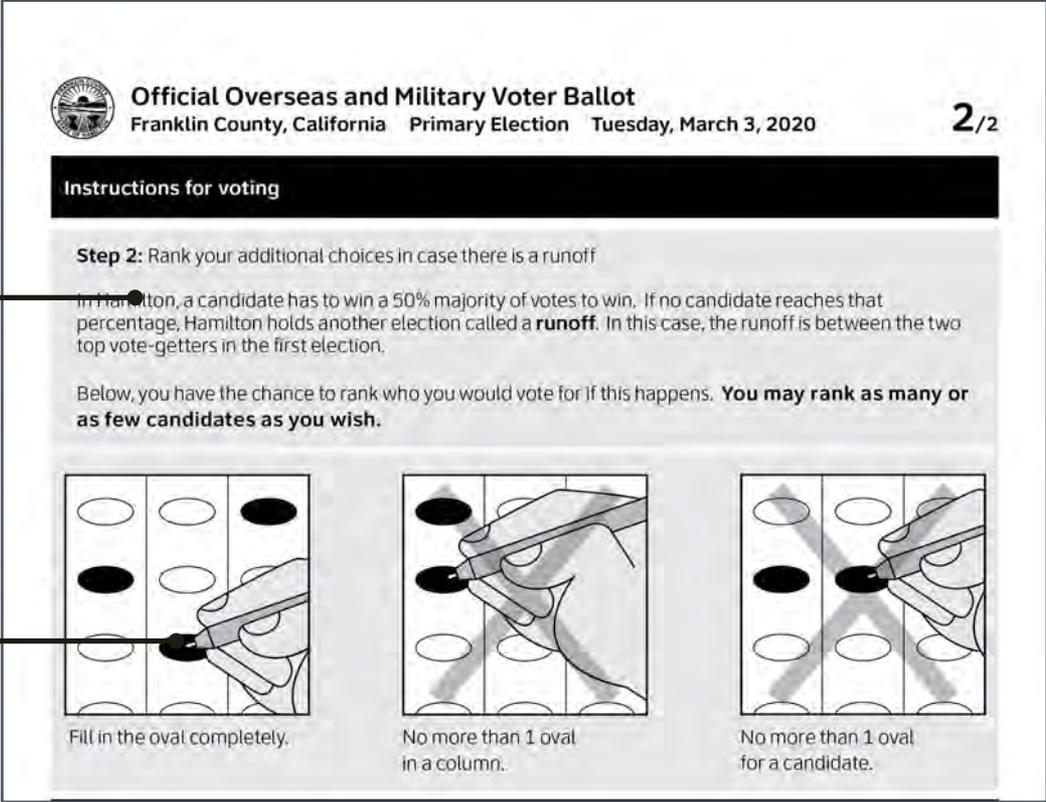Clear indication that a second page exists.

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Recipe for a 2- page runoff ballot

5 participants out of 17 said they preferred a 2-page ballot.

Runoff explanation and ranking instructions.

Illustrations borrowed from previous RCV research.

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Recipe for a 2- page runoff ballot

5 participants out of 17 said they preferred a 2-page ballot.

Grid borrowed from previous RCV research.

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Other resources

What else came out of this project

This report contains data that's specific to the design of the runoff ballot. More information about the participants is also available.

Stories from overseas voters

Read 17 different accounts of what it's like to vote from overseas.

Survey data and summary

Review the results from over 70 participants in a survey we conducted online.

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