

# Best Practices Designing Ranked Choice Voting Ballots

Guidelines for Ranked Choice Voting ballot layout and design.

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## Introduction

At CCD, we know that good ballot design and effective voter education make informed and confident voters. It can be a challenge to fit everything on a ballot, especially on mixed contest ballots with multiple languages and many candidates. But, good design will help you fit everything you need to and support both novice and advanced RCV voters.

For us at CCD, a successful RCV vote means that:

- Voters understand how to mark the ballot to express their intent.
- Voters make their own decision about ranking.
- Voters feel confident that their voice will be heard.

## Who are these guidelines for?

These guidelines are for anyone designing a RCV or mixed contest ballot.

## Why follow these guidelines?

Poorly designed ballots lead to:

- Voters not voting in a way that reflects their intent.
- Higher over and undervote rates.
- Voter confusion.

## What's included in these best practices?

- RCV ballot layout styles.
- How to divide contests on a mixed contest ballot.
- What to include in RCV ballot instructions.

### What are these guidelines based on?

- Our research on what works for voters. (See <a href="Page 24">Page 24</a> for more details)
- The experience of elections offices and other groups in their successful campaigns.

## **Best Practices**

# **Designing Ranked Choice Voting Ballots**

**First, you'll need to choose a RCV ballot style** that works for you, your election system, and your voters.

No matter what style of RCV ballot you're designing:

- Follow the EAC's best practices for ballot designs. Best practice design helps voters focus on their intent, not the mechanics of marking the ballot. Page 12
- Write clear, short instructions. Write those instructions in plain language to make ranking understandable. Page 13
- **Include visual instructions**. Use illustrations that show how to correctly and incorrectly fill out a RCV ballot. Page 14
- Put instructions where voters need them. Include instructions at the top of the ballot and within each contest. Provide full instructions in supplementary materials. On Ballot Marking Devices, tell voters how many ranks they have left and include a review screen with undervote alerts. Page 15
- Arrange multilingual ballots to support bilingual readers.
   Lay out multilingual material with languages side-by-side (vertically or horizontally). Page 19
- Clearly separate RCV and non-RCV contests. Ballot layout is often constrained by the legal order of contests. Depending on your state's restrictions use a page turn, clear headers, and/or instructions to divide contest types. Page 20

Read more about our research and best practices for Ranked Choice Voting at **civicdesign.org** 

# **Ballot Styles**

In our research we have tested several styles of RCV ballot. Each has its own advantages and disadvantages.

You'll need to choose a RCV ballot style that works for you, your election system, and your voters. You know your jurisdiction best!

These best practices include the following RCV ballot layouts:

- Grid Page 5
- Adapted optical scan <u>Page 7</u>
- UOCAVA Combined for overseas voters <u>Page 8</u>
- Hand-ranked <u>Page 10</u>
- Accessible <u>Page 11</u>

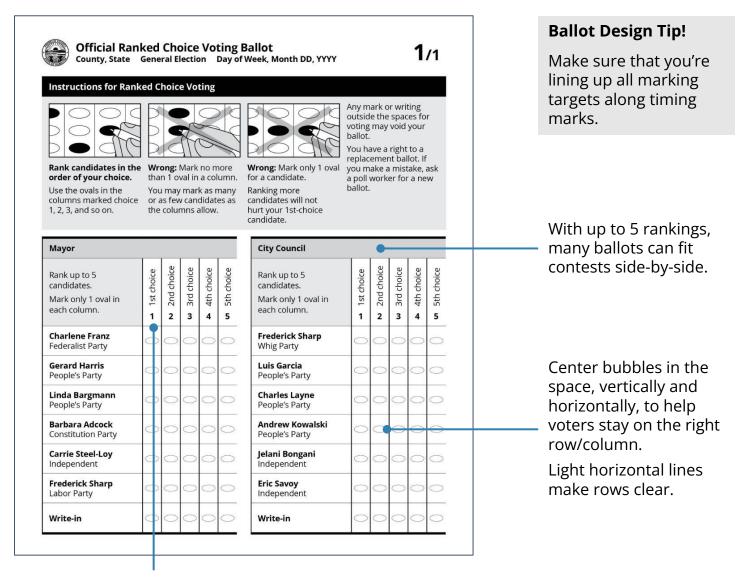
#### **Key questions to ask yourself** when picking a RCV ballot style are:

- Is ranking new for your voters?
- How many contests will include ranking? Where are those contests in the overall ballot order?
- What are your legal requirement for ballot design, especially requirements for the number of choices ranking?
- Does your voting system support RCV ballot layout?

## Grid — up to 5 ranks

Ranks are in columns and each candidate is a row. This ballot style is the most common accommodates different numbers of rankings within the limit of paper width.

Up to 5 ranks is a good number of ranks to use so that you can fit two contests side by side. Any more ranks than that make it difficult to fit two contests beside each other with large enough text..

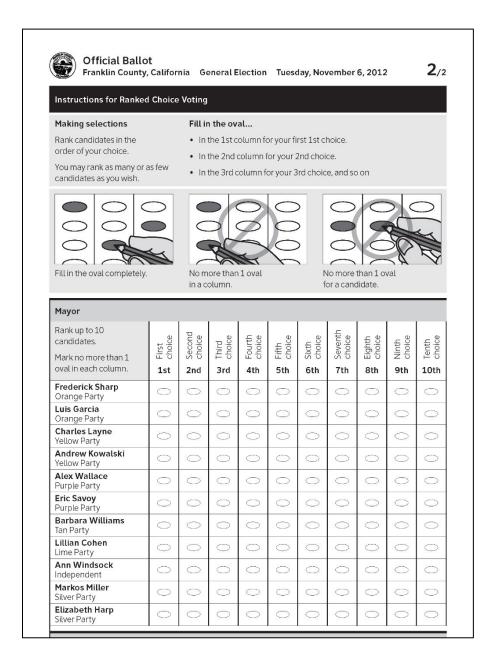


Numerals read from left-to-right. Using just the number is okay, especially on a multilingual ballot.

# Grid — up to N ranks

It is possible to rank more than 5 candidates, but the challenge is that they take up more space. To create a well designed ballot with more than 5 ranks, you will only be able to fit 1 column of contests.

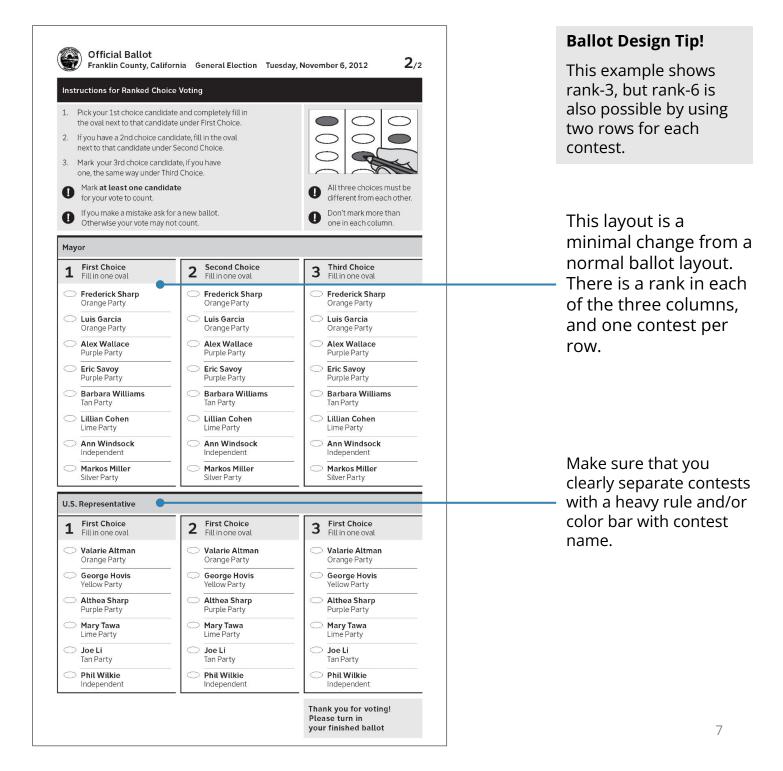
You will only use as many ranks as candidates, so rank-10 will have wide variation in different contests!



# **Adapted Optical Scan**

If you can't use the grid style, this is for you! Each rank is laid out like a separate contest.

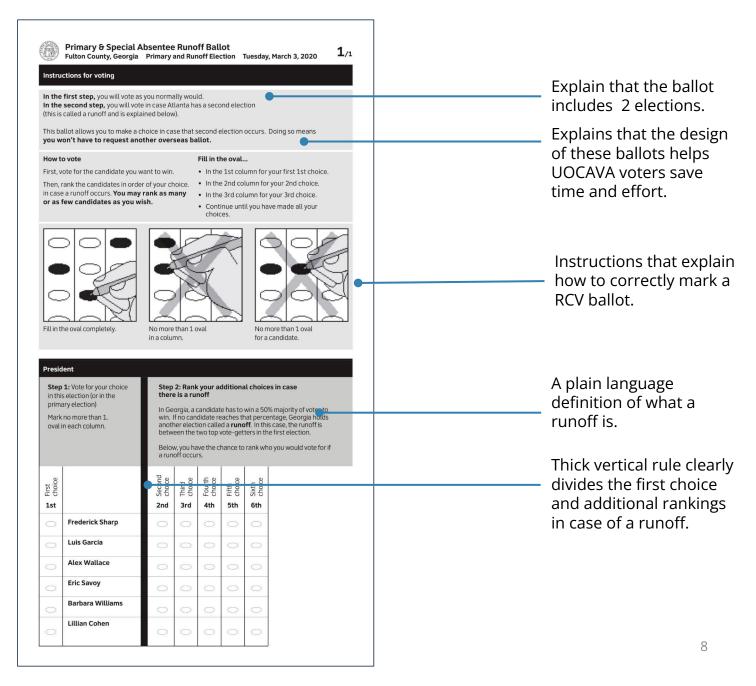
This ballot style works well with all tabulators, include those that don't have a RCV module. It can be a transition between formats.



## **Election and Runoff combined**

When there is a runoff election, there is often not enough time for overseas voters to receive and return their ballots. Some states use RCV so UOCAVA voters can vote in both the general election and any possible runoff at the same time.

This version combines both steps. One research participant said "I like how it's broken down, the two steps close together. I like this one better because it's easier to read."



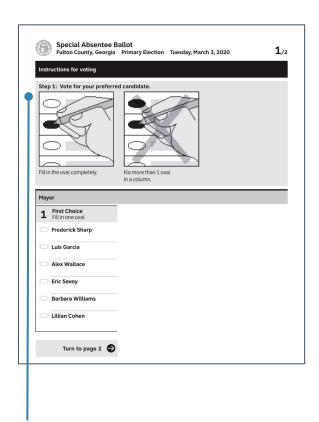
# **Election and Runoff as separate ballots**

This version puts the two steps on different sides of the ballot or on different ballot papers.

Both Election and Runoff worked well in testing. Read more about our UOCAVA RCV research at civicdesign.org/projects/rcv

#### Step 1

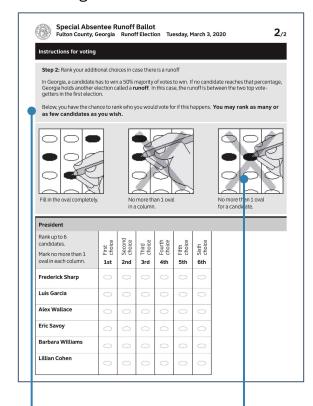
Voters mark a single choice for the general election.



Each ballot is shown as a separate step

#### Step 2

Voters rank candidates to be used in case of a runoff. The challenge is that voters must vote for their 1st choice again.



A plain language definition of what a runoff is.

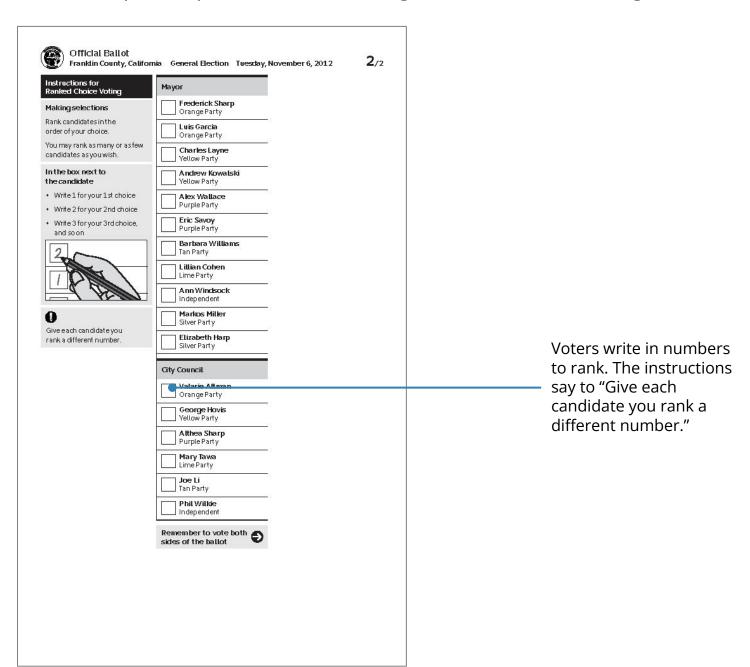
Instructions that explain how to correctly rank candidates

## Hand-ranked

Voters enter the ranking numbers by hand.

This style is easy to explain and allows for a three column ballot, but has challenges for implementation.

- Voters in our research had difficulty ranking long contests.
- It requires optical character recognition or hand counting.



# **Accessible RCV on Ballot Marking Devices**

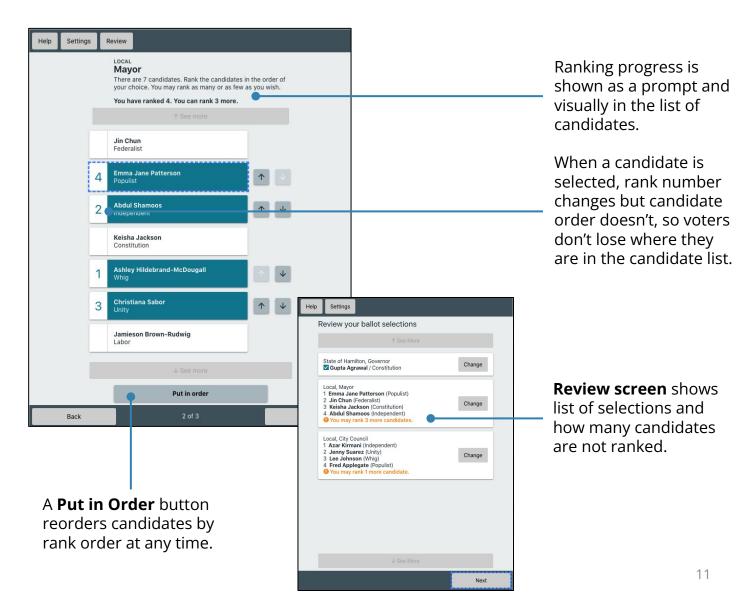
Navigation and ranking interactions are designed for to work with a wide range of voters' abilities while remaining efficient. Voters select candidates in the order they want to rank them.

**Audio script** combines on-screen text with status information and instructions.

**Pauses** separate chunks of text providing "space' for the voter to interrupt the audio.

**Up/Down** key moves around the screen to every screen element.

**Select** key activates the button currently in focus (blue dotted box), and completes the action the button represents.



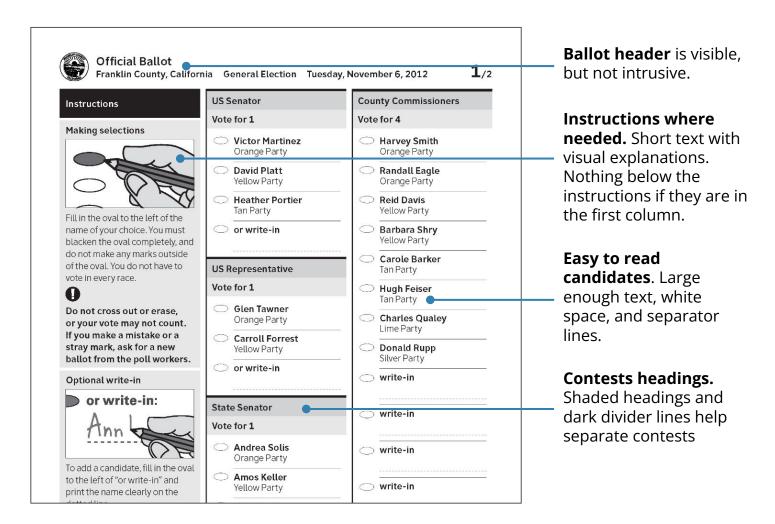
# Follow the EAC's best practices for ballot designs.

# Best practice design helped voters understand, so they can focus on their intent.

Clear design makes a ballot easier for voters to fill out as they intend.

#### Learn more:

- EAC's Designing Polling Place Materials
- Field Guide Vol 1 Designing Usable Ballots

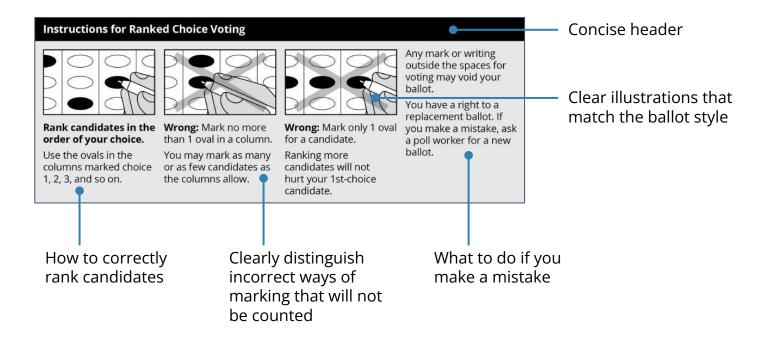


## Write clear, short instructions.

# Clear instructions help voters accurately mark their ballots.

Concise ballot instructions tell voters only what they absolutely need to know to vote. They will also help you save space on crowded ballots.

The below instructions come from many rounds of usability testing. Copy and use the full text of these instructions on <a href="Page 22">Page 22</a>.



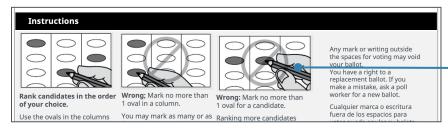
## Include visual instructions.

# Use illustrations that show how to correctly and incorrectly fill out a RCV ballot.

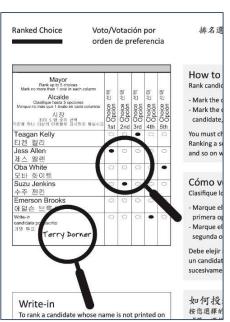
At a minimum, include an illustration of the correct way to mark the ranked choice contests on the ballot.

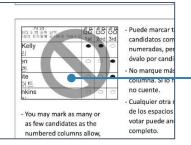
Clearly distinguish correct and incorrect ways of marking so that the correct way sticks out in voters minds'. To make the difference clear, use:

- **Scale**. Make the correct example larger than the incorrect example.
- **Symbols**. Slashed circles and Xs mean "Do not". Check marks and open circles mean "Do".
- **Color**. Make sure the colors you choose are accessible to colorblind voters.



Put illustrations next to their relevant instruction text. Don't duplicate illustrations on multilingual ballots.

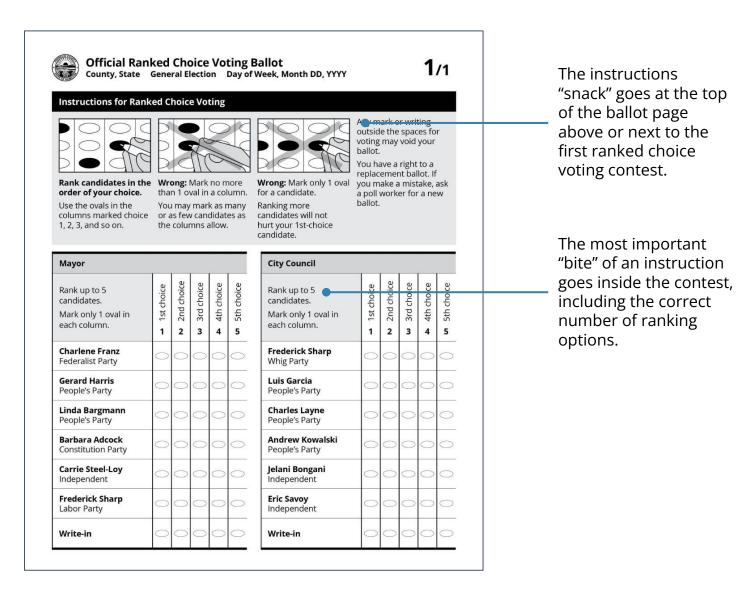




On the NYC Privacy Sleeve, the incorrect examples are minimized because they are smaller and covered with a symbol.

# Include instructions at the top of the ballot and within each contest.

Ballot instructions also use a bite-snack-meal framework. Instruction "bites" and "meals" are included on the ballot.

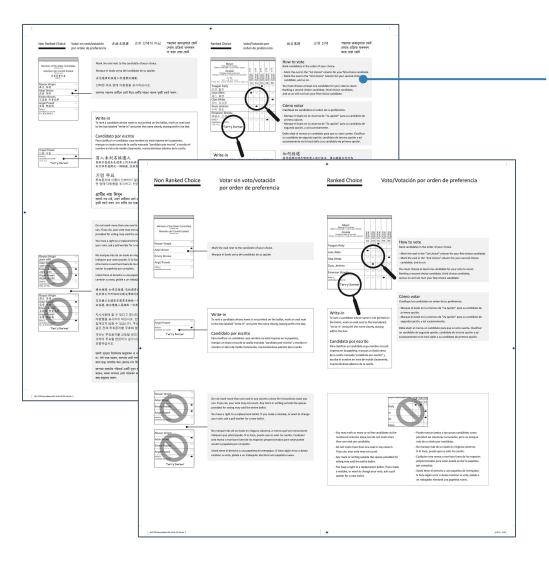


# Provide full instructions on supplementary materials.

A full "meal" of ballot instructions can be included on:

- Ballot privacy sleeves
- Mail ballot inserts
- Poll signage

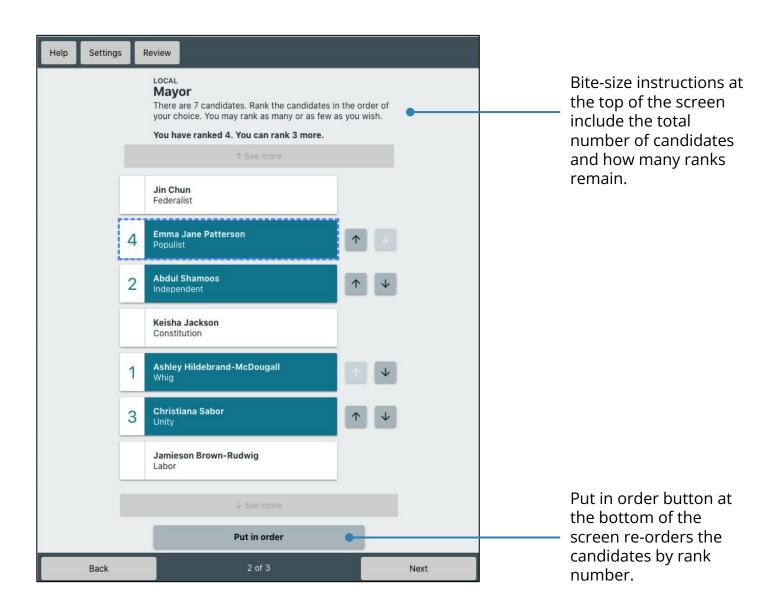
In the below example from NYC, an evergreen ballot privacy sleeve includes full instructions for non-RCV (on the left page) and RCV contests (on the right page). The privacy sleeve is about  $20 \times 20$  inches unfolded.



The ballot privacy sleeve fits detailed instructions in up to 5 languages.

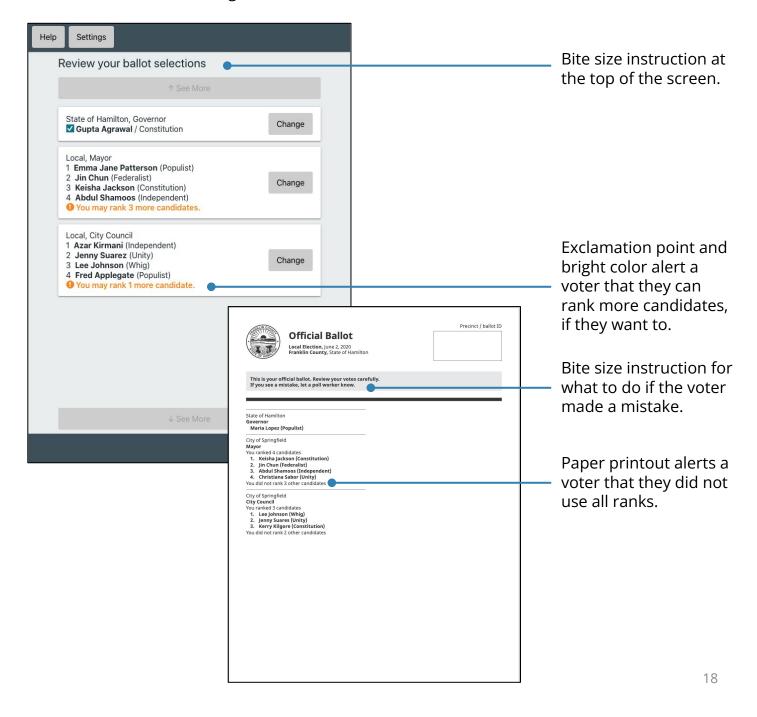
# On Ballot Marking Devices, tell voters how many ranks they have left.

Ballot Marking Devices can prevent both under and overvotes by telling people how many rankings are left.



# On Ballot Marking Devices, include a review screen with undervote alerts.

BMD review screens are another opportunity to prevent undervotes in RCV elections. The review screen must easily allow voters to return and change their selections.

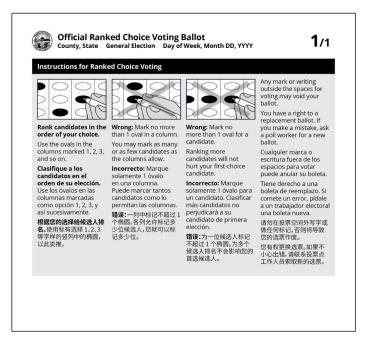


# Arrange multilingual ballots to support bilingual readers.

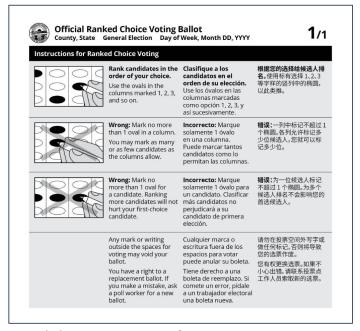
# Lay out multilingual material with languages side-by-side (vertically or horizontally).

Each language should be visually distinct so that it is easy to compare the English version and translations.

Copy and paste our RCV instruction text written based on our research in English, Spanish, and Simplified Chinese from <a href="Page 22">Page 22</a>.



Each language is a **row**. Each instruction is a **column**.



Each language is a **column**. Each instruction is a **row**.

# Clearly separate RCV and non-RCV contests.

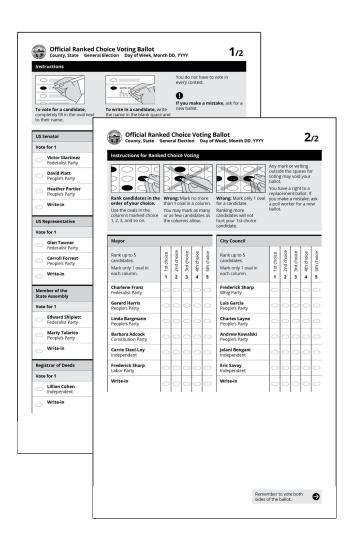
# Separate contests with a page turn or full width header and instructions.

We hear many concerns about whether voters will understand the difference between RCV and non-RCV contests on mixed contest ballot.

The solution is good ballot design, clear divisions between contest types, and instructions where voters need them to show when voters are transitioning between contest types.

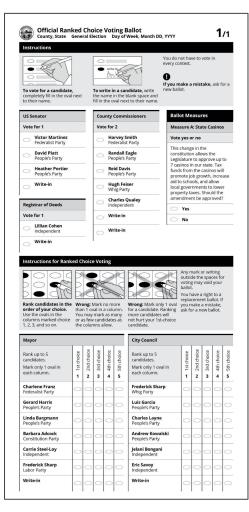
#### Separate with page turn

Instructions are at the top of each side of the ballot.



# Separate with a full width header and instructions

If the ballot is very short, make sure the RCV instructions are before the first RCV contest.



# Checklist

# **Designing RCV Ballots**

ollo	ow the EAC's best practices for ballot designs.			
	Is your text large enough?			
	Does the ballot include white space so that candidate names are easy to read?			
	Do contest headings and divider lines clearly separate contests and candidates?			
Cho	ose a ballot style that works for your jurisdiction.			
	What ballot style will you use?			
	Does your election system include RCV tabulation or not?			
Write clear, concise instructions.				
	Are the ballot instructions written in plain language?			
nclude visual instructions.				
<u> </u>	Does the ballot include an illustration of how to correctly mark? Are correct and incorrect ballot marking illustrations visually distinct from each other?			
ut	instructions where voters need them.			
	Have you included full instructions on supplementary materials?			
Arra □	Inge multilingual ballots to support bilingual readers.  Are multilingual ballots laid out in a way that supports multilingual learning?			
Clea	rly separate RCV and non-RCV contests.			
	How will you separate contest types of your ballot layout?			
Make sure to test your demo ballot with voters!				

Do you have a plan to test your ballots before the election?

# **Copy & Paste RCV Instructions Text**

**Snack.** At the top of the ballot page before the first RCV contest.

English	Spanish	Simplified Chinese
Rank candidates in the order of your choice. Use the ovals in the columns marked choice 1, 2, 3, and so on.	Clasifique a los candidatos en el orden de su elección. Use los óvalos en las columnas marcadas como opción 1, 2, 3, y así sucesivamente.	根据您的选择给候选人排名。 使用标有选择 1、2、3 等字样 的竖列中的椭圆, 以此类推。
Wrong: Mark no more than 1 oval in a column. You may mark as many or as few candidates as the columns allow.	Incorrecto: Marque solamente 1 óvalo en una columna. Puede marcar tantos candidatos como lo permitan las columnas.	错误:一列中标记不超过 1 个 椭圆。各列允许标记多少位候 选人,您就可以标记多少位。
Wrong: Mark no more than 1 oval for a candidate. Ranking more candidates will not hurt your first choice candidate.	Incorrecto: Marque solamente 1 óvalo para un candidato. Clasificar más candidatos no perjudicará a su candidato de primera elección.	错误: 为一位候选人标记不超过 1 个椭圆。为多个候选人排名不 会影响您的首选候选人。
Any mark or writing outside the spaces for voting may void your ballot.	Cualquier marca o escritura fuera de los espacios para votar puede anular su boleta.	请勿在投票空间外写字或做 任何标记, 否则将导致您的选 票作废。
You have a right to a replacement ballot. If you make a mistake, ask a poll worker for a new ballot.	Tiene derecho a una boleta de reemplazo. Si comete un error, pídale a un trabajador electoral una boleta nueva.	您有权更换选票。 如果不小心出错,请联系投票 点工作人员索取新的选票。

### Bite. Inside each contest.

English	Spanish	Simplified Chinese
Rank up to 5 candidates. Mark <i>only</i> one oval in each column.	Clasifique hasta 5 candidatos. Marque solo un óvalo en cada columna.	最多可排列 5 名候选人。 每一列中只标记一个椭圆。

## The research behind these best practices

#### 2017 Research for Best Practices for RCV ballots and materials

In this project with Fair Vote and the Ranked Choice Voting Resource Center, we tested in locations with and without RCV including Southern California, NJ, Minneapolis, San Francisco/Oakland, Denver, and Maine. We worked with almost 200 people who identified as first-time voters, experienced voters, and a few non-voters.

Most of the studies were qualitative interviews with a few people, but we also ran a large-scale study in which voters tried voting on three different ballot styles. In another, we talked to voters immediately after voting in an RCV election in Maine to learn how they approached the challenge of ranking.

Our goal was to learn what helped voters understand and use RCV successfully. Participants used a simple voter education flyer, marked ballots, and answered questions about their reactions to RCV as a concept based on the materials used in the test. We updated the instructions and education flyer between studies, refining the approach.

#### Overseas voters and runoff elections

Five states use ranked choice voting to allow overseas voters to participate in runoff elections by ranking their preferences for a runoff if their first choice is not a winner. Helping them do so successfully required explaining runoffs in addition to how to mark their ballot. This research included a survey of voting experiences with 79 voters. The usability test included 17 voters.

#### Designing an accessible ranked choice ballot

We used the Anywhere Ballot interface as the basis for research into how to support voters who are blind or very low vision, have limited or no use of their hands, or have cognitive or attention disabilities. The research with 15 participants including voters with no use of their hands, autism or other attention and cognitive disabilities, and 6 blind voters used an interactive prototype.

Read more about our research for Ranked Choice Voting at civicdesign.org

## **Additional Resources**

Learn from our Civic Design Skill resources at civicdesign.org

#### **Plain Language**

Field Guide Vol 1 <u>Writing instructions voters understand</u>
Field Guide Vol 4 Effective poll worker materials

#### **Information Design**

Workbook Designing a voter guide to an election

- Using colors effectively
- Planning for multiple languages

Toolkit Civic icons and images

Toolkit <u>Election materials color palette</u> (accessible colors in 4 shades)

## **Usability Testing**

Field Guide Vol 3 <u>Testing ballots for usability</u> Toolkit <u>Usability testing kit</u>

#### **Language Access**

Workbook Planning Language Access



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