

Teaming Up for Election Communications: An Implementation Workbook

How to Build a Coalition with Neighboring Jurisdictions

Running a sophisticated communications operation can be difficult for all election officials; nearly impossible for those who lack adequate staff, money, and time. That is why some election offices are finding success by working together with nearby offices on communications.

When counties share the same media market, addressing the media market together can be more powerful. If one election office plans to buy a print advertisement ahead of the voter registration deadline, why not pool funds with other offices to buy a more prominent advertisement, or add other jurisdictions' names to save on costs? If one office plans to publish an Election Security fact sheet, why not share that resource with other jurisdictions so they can easily do the same?

This workbook provides guidance for meeting election communication challenges through the development of a coalition of elections offices. This workbook draws from the successes of groups like the Coalition of Bay Area Election Officials in California ([see our case study here](#)). For them, working together has resulted in stronger communications with candidates, media, and voters. Plus, they have saved money and built a community among election officials.



Can I Pull Together A Coalition? Should I?

If you've read this far, you see benefits in collaborating with neighbors. Now for the hard part... someone has to lead this project, and that may have to be you.

Taking the leadership reins will require extra work but may allow you to shape the project in directions most useful to your office's needs. Further, it may earn you respect among your peer group of election officials.

You might gain public prominence as one of the spokespeople for the coalition. While building a coalition takes a lot of effort, working with a co-chair can help minimize the burden. Still, we recognize that this effort will take work.

The guide that follows can ease that burden, helping you see how to pull a group together and lead it towards collaborative successes.

Building a Communications Coalition Using This Workbook

This workbook is designed to help you transform an idea into a functioning coalition. It divides building a communications coalition into five steps:

01

Develop Your Idea

Determine what communications issue(s) you want to address and then plan an initial meeting with relevant officials.

02

Convene the Group

Meet with interested offices to define your shared needs and agree on a broad outline of how to work together.

03

Plan in Detail

Create a timeline of opportunities to collaborate; establish agreed upon messages; and assign responsibilities.

04

Implement - Work Together to Put the Plan Into Action

Create the communications documents and resources, and begin to use them; publicize the coalition and its message as applicable.

05

Maintain High Quality Content

Evaluate your program's outcomes, share your findings, and determine how best to modify and improve your program.

Step 1 - Develop Your Idea

Before you bring the idea to a broad group, think closely about your communications opportunities, who may benefit from collaboration, and how to reach out to potential collaborators.



Exercise 1: Make a communications wish list

Make a wish list of communications goals you can achieve by pooling money, people, and skills within a coalition. Put a check next to the items below that are on your wish list. Use the blank lines underneath to add other items to your wish list.

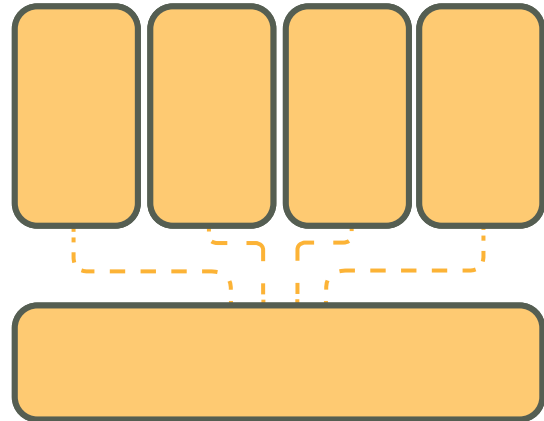
Communications Goals

- Countering misinformation
- Communicating facts about election security
- Attracting more media attention
- Explaining new procedures, laws, or equipment
- Reaching specific audiences including students or minority language groups
- Achieving uniform messaging/branding with neighboring counties
- Distributing voter education materials to wide audiences
- Managing and educating election observers
- Educating and recruiting poll workers
- Overcoming cost constraints on paid media and/or required legal notices
- Overcoming production limitations due to lack of staff or skill
-
-
-
-
-

Exercise 2: Narrow your list

Next, determine what wish list items create opportunities for your office and other offices to work together.

- Consider what you need, what they need, and how those may differ.
- Give careful thought to which jurisdictions are most likely to join and who might help recruit others.
- The scale of the project you envision will naturally affect others' willingness to join.
- Treat your proposal as tentative, recognizing that the cooperation of others will be more likely if they have input.



In the space below, list one to three of the opportunities you identified in Exercise 1 on page 3. Focus on what you can accomplish by collaborating with other jurisdictions:

01 _____

02 _____

03 _____

Exercise 3: Define your vision



Consider the opportunities that you identified above.

Identify strategies for how your jurisdiction and others might collaborate on those opportunities.

Joint Purchasing
Some counties use joint buys to lower the cost of publishing legal notices or advertising.

Put a check next to each strategy or define some of your own.

✓ Strategies

- Share existing communications materials. (press releases, fact sheets, signs, posters, training materials, etc)
- Create new and engaging content with a uniform message all members can share.
- Buy advertisements. (print, tv or online)
- Make additional or joint media appearances.
- Establish a joint content release schedule. When members release a communication together, that improves the chances of it being seen.
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Exercise 4: Build your invite list



In the sections above, you identified a communications challenge that your jurisdiction and others share and defined your vision of how to tackle that challenge together. Now, determine who to invite to your first coalition meeting.

The collaborative effort can grow, and it is okay to begin smaller with election offices that are likely to support the effort.

Brainstorming Prompts: Ask yourself the following questions as you make your invite list.

You can use the space below to list your invitees.

<p>Which jurisdictions share the same media market?</p>	<p>Which jurisdictions have the same methods, rules and equipment for voting?</p>
<p>Which jurisdictions already have dedicated communication support?</p>	<p>Is there a partner jurisdiction others already look to for help and support to help recruit participants?</p>
<p>Are there existing groups or geographic regions that lend themselves to a coalition approach?</p>	

Once you have finished considering these prompts and questions, build your invite list. See [Appendix B](#) for an Invite List Template.

Next steps:

Once you have sorted out your own vision for a collaborative communications group, and maybe pulled in one key peer who shares this vision, it is time to convene the first meeting.

Step 2 - Convene the Group

The goal of a first meeting is to convince others of the benefits of working together. You will provide an overall vision of what the coalition is aiming to accomplish so that participants feel the investment of time and money is worthwhile. The exercises below can help you build your pitch for the first meeting.



Exercise 1: Think about the "hook"



Make joining your coalition appealing by considering the "hook" - the main reason or reasons that your coalition benefits its members and their communities. It may be helpful to revisit and refine the wish list items, opportunities, and strategies you identified throughout Step 1 above.

Put a check next to any of the ways your coalition could benefit your meeting invitees:

<input checked="" type="checkbox"/> Benefits	
<input type="checkbox"/>	Reduce stress on staff, because other coalition members can provide assistance
<input type="checkbox"/>	More eyes to identify and counter misinformation on various platforms
<input type="checkbox"/>	More human resources to respond to or counter misinformation
<input type="checkbox"/>	Amplify efforts to counter misinformation, through joint release of materials
<input type="checkbox"/>	Attract media attention, through collaborative outreach
<input type="checkbox"/>	Improve web or social media presence, by sharing staff or resources
<input type="checkbox"/>	Reduce voter confusion through consistent messaging across jurisdictions
<input type="checkbox"/>	Expand voter outreach in communities, including for specific audiences (students, language groups, etc)
<input type="checkbox"/>	Reduce work by sharing responsibilities (making guides, fact sheets, etc)
<input type="checkbox"/>	Save costs (e.g. pooling funds to buy a joint print media advertisement)
<input type="checkbox"/>	Improve poll worker recruitment and education, by sharing resources
<input type="checkbox"/>	Improve quality of materials, by sharing existing high-quality materials
<input type="checkbox"/>	Improve morale, by building relationships between jurisdictions
<input type="checkbox"/>	
<input type="checkbox"/>	

As you think about your "hook" also consider constraints or reasons that some might not join. Considering these will help as you begin exercise 2:

- Lack of trust or belief the project is unlikely to succeed
- Perceived partisanship
- Jealousy of other offices or state or association leadership
- Budgetary constraints
- Legal restrictions
- Perception of lesser need

One of the great benefits of a coalition is sharing human resources. Your office might have staff with some but not all of these skills. Consider which offices have staff that bring each of these skills to the table:

- Strong writing and editing
- Graphic design
- Photography or videography
- Website creation and design
- Public speaking
- Comfort in front of a camera (for videos)
- Technical writing (for drafting FAQs or security practices)
- Crisis management and crisis comms

Exercise 2: Draft an agenda

Now you're ready to draft the first meeting's agenda and outline the discussion. Consider taking ideas from this sample agenda as you build your own.

I. Introductions

II. Coalition Proposal

- A. Shared communications challenge that we might address together
- B. Opportunities and constraints for forming a coalition (this is where you pitch your "hook" to attendees)
- C. Examples of strategies our coalition could use to improve communications (use the Define Your Vision exercise)
- D. Share examples of other joint ventures (invite attendees to share good and bad examples of joint ventures they have done before)

III. Scope and goals of our coalition

- A. Discussion of goals
- B. Discussion of communication topic(s) and scope of cooperation
- C. Group feedback to clarify, expand, or narrow goals

IV. Establish the audience for our communications efforts

- A. Media?
- B. Voters?
- C. Observers?
- D. Election workers?

V. Develop a strategy and approach

- A. Shared name and logo?
- B. Mythbusting?
- C. FAQ and general public information?
- D. Define topics to be covered - range of election topics or a limited set?
- E. Tone - should communications be strictly factual, make emotional appeals, or a mix?

VI. Resources

- A. Staffing
- B. File-sharing (i.e., how will you share draft documents?)
- C. Web hosting and other IT
- D. Social media
- E. Any outside resources (logo design or communications assistance)

VII. Governance

- A. How will decisions be made? Is consensus necessary?
- B. Select co-chairs (bipartisan and/or big/small jurisdiction)
- C. How can we ensure everyone feels comfortable raising concerns? (The alternative may be dropping out of the coalition)
- D. Can subgroups push shared messages as part of the coalition, even when the message doesn't apply to all (for instance, when different voting equipment requires different procedures)?
- E. Should a code of ethics be drafted for members to sign? See [Appendix A](#) for an example from the Coalition of Bay Area Election Officials.

Tip for your first meeting

Focus your message on the good work you can do, and on the commonalities between those present (e.g. same state, same region, similar communities of voters, same media market, same voting equipment, same struggles with the media etc).



Step 3 - Plan in Detail

You know your coalition’s goals and you have members. Now it is time to do the work. The exercise below will help you plan coalition projects. Specifically, this exercise helps ensure that:

01
Projects have a goal release date.

02
That date was chosen for a reason.

03
Relevant stakeholders know that they are responsible for the project.

Exercise 1: Choose projects and set due dates

Consider having coalition members complete a project plan worksheet each time a new project is chartered. For project ideas, see [Appendix C](#) and for a Project Plan Template, see [Appendix D](#).

Project Plan Sample

Project Name:	Video: How Do I Fill Out My Ballot?	Goal Release Date:	August 25, 20xx
Why This Release Date:	The video will be available shortly before voters receive mail ballots.		
Deliverable(s):	A short video for social media explaining to voters how to fill out their ballot.		
Owner:	Joe Clerk, Clerk-Recorder for County	Helper(s):	Michael Director

This Project Has Succeeded If:	By the release date, this video is posted on all coalition social media accounts and websites.	Short Term Goal: (six months)	Release video and promote to voters; receive at least X number of views across social media platforms.
Medium Term Goal: (one year)	Re-promote video before the next General Election’s early voting period.	Long Term Goal: (more than one year)	Continue to re-promote video before early voting for General Elections; reproduce video if important information changes.

Priority	Task Name	Assigned To	Due Date	Status
High	Script and storyboard	Joe Clerk	July 01	In Progress
Med	Determine shooting time/place	Michael Director	July 20	Done
Med	Cast any extras needed	Michael Director	August 01	Not Started

Exercise 2: Create contact lists and media lists

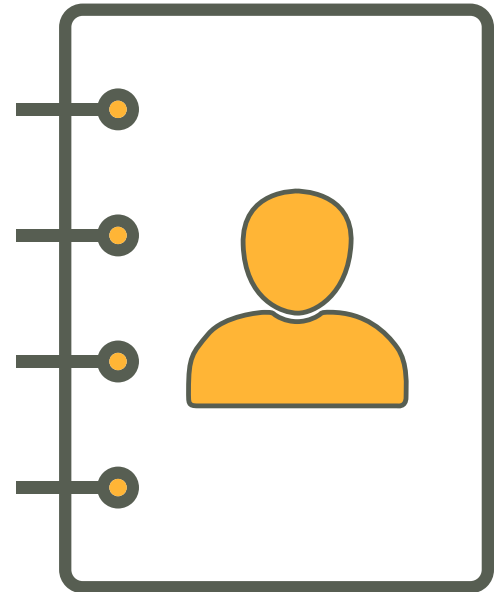
For your coalition's media projects, consider creating contact lists for members and for the media, using these tips:

For coalition members:

- Create a contact list with
 - Member names
 - Jurisdictions
 - Email address
 - Office phone number, and
 - Best way to contact
- Avoid including sensitive information, as this list will be subject to the Freedom of Information Act (FOIA).
- Consider creating a separate contact list (or lists) for reaching other important stakeholders.

This list might include

 - County staff
 - Elected officials
 - Poll workers
 - Parties
 - Media
 - Vendors and/or,
 - Law enforcement



For the media:

- Create a contact list with at least one point of contact from each member jurisdiction.
- When choosing each jurisdiction's point of contact, consider
 - Member's role
 - Their availability, and
 - Their level of media comfort
- Include each point of contact's
 - Name
 - Jurisdiction
 - E-mail address
 - Office phone number
 - Best way to contact
- Distribute this list to relevant media including print and TV news.



Exercise 3: Prepare for future meetings

Before each meeting, each member may wish to complete the exercise below. This will help set the meeting's agenda and focus projects.

What upcoming election milestones could we address?

What emerging election issues can we address?

What topics are unclear or confusing to stakeholders in our communities?

Next steps:

You've chosen your projects, set due dates and prepared for future meetings. Now it's time to begin taking action and releasing your project to the public.

Step 4 - Implement - Work Together to Put the Plan into Action

As you continue your collaboration, consider how to keep the working group together and on task. The tips below will help your group keep up its work well into the future.

**01**

Hold regular meetings

- Schedule meetings well in advance so that all members or their designees can attend.
- Sync every week or two, adjusting as necessary for the election schedule.

02

Set a content development schedule

- Work backwards from a project's expected release date and set deadlines for project milestones.
- If possible, work in extra time for unexpected delays.
- Ensure that all members are shared on this schedule.

03

Set a content release schedule

- Reference your project plans to make sure you are meeting the expected release date and that you understand the significance of that date.
- Generally, plan to release content at the same time, on the same day of the week.
- You may need to make exceptions for certain election events or for crisis communications.

04

Keep your members involved

- Seek member feedback on projects. This includes soliciting member feedback on drafts of any upcoming releases.
- Get member buy-in on projects by seeking consensus and being flexible.

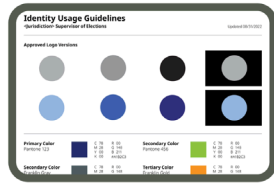
05

Hold smaller breakout sessions (for large coalitions)

- Small group discussions with prompts can build camaraderie.
- Small groups can tackle specific issues in depth (consider providing prompts or goals for these groups).
- Groups can be organized randomly (for relationship building) or intentionally (to address issues specific to a region; by jurisdiction size; by subject matter expertise; etc).

As you implement your projects, remember; do not reinvent the wheel. Consider resources that are already available to you.

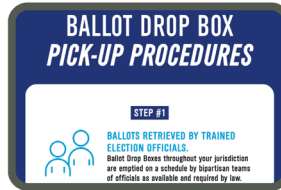
For many example elections communications projects, see the Elections Group's Communications Resources Desk.



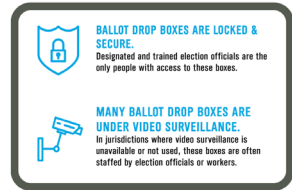
Developing Your Brand Identity
Create a brand identity for your jurisdiction by using consistent elements – logos, fonts and color palettes. Maintaining a consistent brand identity is important to establishing your jurisdiction as a trusted source of information.



Ballot Sorter Signs
Creating signs illustrate the sorting procedures for ballot sorters.



Ballot Drop Box Pick-up Procedure Posters
Creating posters and handouts that illustrate the security measures and procedure surrounding Ballot Drop Box Pick-up Procedures can be helpful assistive tools.



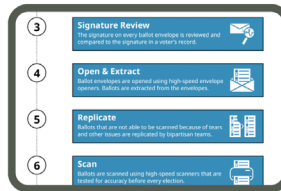
Ballot Drop Box Security Posters
Creating posters and handouts that illustrate the security measures and procedures for ballot drop boxes.



Mail Ballot Processing Posters
Conspicuous posters in mail ballot processing rooms or facilities are a helpful tool. They allow observers to follow the process as it happens, and coupling posters with handouts that provide descriptions of each process is an effective way to provide additional clarity to observers.



Schedule of Events for an Election
Providing a schedule of important events for an election is an easy way to make sure that members of the public and media are updated on what goes into administering an election.



Mail Ballot Processing: Posters and Handouts
Creating posters and handouts that illustrate the steps of mail ballot processing is a simple way to make sure that observers are aware of each step of the process and can follow along in person as they take place.



Writing Effective Elections Press Releases
Writing effective press releases is key to making sure that journalists and news organizations share the information that your office needs voters to be aware of.

For projects regarding Election Workers, see the Elections Group's Standards of Conduct for Election Workers guide.

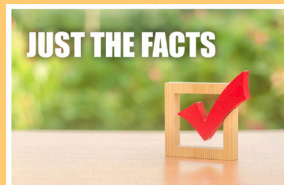


The Coalition of Bay Area Election Officials has example press releases, fact sheets, and voter education videos available on their website.



Editorials and Press Releases

Voter Education Videos



Just the Facts




Key Dates

Step 5 - Maintain High Quality Content

By following the steps above, you have formed a coalition of election officials who work together to overcome communications challenges. This final step ensures that your coalition continues to produce quality content.

Exercise 1: Evaluate each communications project

Once you have released a project into the world, you should follow up to evaluate its success. This process may lead you to revisit current projects or inspire ideas to improve future projects. Below are questions to ask yourself when evaluating a project's success:

 Question
<input type="checkbox"/> Are people viewing the project? (e.g. YouTube views)
<input type="checkbox"/> Is the project receiving interactions on social media?
<input type="checkbox"/> Has the project increased traffic to your website?
<input type="checkbox"/> Is your project receiving media attention?
<input type="checkbox"/> Are you hearing from members of the community about the project?
<input type="checkbox"/> Are government officials responding positively to your project?
<input type="checkbox"/> Have you received positive feedback on the project? From whom?
<input type="checkbox"/> Did the project seem to increase attendance at relevant events? (for example, L&A testing attendance after an L&A FAQ)

For some projects, you may want to develop your own analytics tools (for example, conducting surveys of registered voters)

Exercise 2: Assess the coalition's working environment

Solicit feedback from the coalition members at least yearly. You may wish to hold private conversations with each principal member, host an interactive meeting, or solicit feedback through a survey. You should also consider feedback from the public, since they are the beneficiaries of your coalition's work. Consider some of these questions, which may be tailored to your unique experience.

✓	Question
<input type="checkbox"/>	Is your coalition working as intended?
<input type="checkbox"/>	Was your mission clearly defined? Does it need to be modified?
<input type="checkbox"/>	Are you receiving positive feedback?
<input type="checkbox"/>	Is there any negative feedback?
<input type="checkbox"/>	In particular, is there negative feedback that could foreshadow misinformation about your coalition or elections in your jurisdiction?
<input type="checkbox"/>	Was the frequency of meetings sufficient?
<input type="checkbox"/>	Were all the right parties on board?
<input type="checkbox"/>	Should this group continue into the future, or was this a "one and done," mission-accomplished effort?
<input type="checkbox"/>	Were your expectations for the coalition met? Why or why not?
<input type="checkbox"/>	Did the coalition meet all of its goals? If not, why did it fall short?
<input type="checkbox"/>	Was the scope of the project fitting? If not, was it too wide or too narrow? Explain.
<input type="checkbox"/>	What unexpected challenges did you encounter working together?
<input type="checkbox"/>	What unexpected benefits did you encounter working together?
<input type="checkbox"/>	Do you feel your communications resources are better/stronger because of the coalition?
<input type="checkbox"/>	Have you received any public feedback? If so, please share.
<input type="checkbox"/>	How do other members of your office feel about the coalition?
<input type="checkbox"/>	Do you have any metrics, indicators, or anecdotes that may help you understand the effectiveness of your program?

Exercise 3: Share your findings

Other jurisdictions in your state or throughout the nation may benefit from learning about your experiences. Actively look for opportunities to share your findings. These may include:

Prepare a short presentation for your local governing board, state association of election officials, or even a national conference.

Now that you are savvy working with regional media, produce a local interest story on your group's efforts and successes.

Produce a short video to broadcast on social media.

Create a short report to publish on your website and distribute through your professional network.

Appendix A

Coalition of Bay Area Elections Officials Code of Ethics and Standards of Conduct

We believe freedom is an inherent human right. Freedom is fragile in nature, best maintained and nurtured through the democratic process. The success of the democratic process requires fair and open elections, which accurately reflect the intent of the electorate.

As Elections Officials, we are entrusted with the responsibility to protect and promote public trust and confidence by conducting accurate, fair, and transparent elections. To reach this goal, we must be guided by ethical, non-partisan, law-abiding principles. Through a dedicated adherence to this Code of Ethics and Standards of Conduct, we demonstrate our pledge to freedom, our pride in our profession, and a commitment to the democratic process.

As mandated by the Constitution of the State of California and Government Code and to ensure that every citizen can have confidence in the integrity of their county government and the impartiality of their County's Election Administration, we swear this Oath of Allegiance. Under this oath, we solemnly swear to support and defend the Constitutions of the United States and the State of California against all enemies, foreign and domestic, and to bear true faith and allegiance to the Constitutions of the United States and the State of California. We follow the Rule of Law.

The Coalition of Bay Area Elections Officials, herein pledges to adhere to this Code of Ethics and Standards of Conduct.

As public servants, entrusted with the conduct of elections, we promise to:

- Uphold the Constitution of the United States of America, the Constitution of the State of California, and the laws, regulations, policies, and court decisions of federal, state, and local jurisdictions;
- Uphold the highest standards of honesty and integrity in order to restore and reinforce public trust and confidence in elections;
- Observe the highest standards of performance and discharge faithfully the duties of office;
- Maintain public confidence by conducting impartial elections with fairness, efficiency, accuracy, transparency, and honesty;
- Manifest a positive role in the communities we serve by remaining accessible and receptive to individuals and groups, and exhibiting fair and equitable treatment of all members of our communities;
- Be flexible and innovative within the framework of the law to carry out the duties of Elections Officials on behalf of the public's interest;
- Have courage and stamina to protect the public interest;
- Conduct fiscal responsibilities with thoughtful consideration, integrity, and accountability;
- Not take part in any action that can be misconstrued or perceived to be a conflict of interest, including, but not limited to, the use of position or station to endorse or otherwise influence an item or person on the ballot;
- Provide equal opportunities to participate in the democratic process to all voters; and
- Treat all persons and parties of interest in a fair, neutral, and non-partisan manner, regardless of political affiliation.

Appendix B

First Meeting Invite List

Name	Jurisdiction	E-mail	Expertise	Confirmed

Appendix C

Coalition Project Ideas

The Elections Group can also assist you with your communications projects. Request assistance from the Election Group's [Communications Resources Desk here](#).

- Develop a coalition logo.
- Create voter education videos.
- Establish a common format for press releases.
- Draft fact sheets for voters, observers, poll workers, the media, etc.
- Schedule social media posts, including reminders for voters.
- Build social media material that can be shared by all coalition members.
- Build materials for observer rules and expectations of behavior.
- Create handouts (e.g. mail ballot processing, logic & accuracy testing, observer rules).
- Improve member websites.
- Create a coalition website.
- Pool funds to buy advertisements.
- Make an election communications plan.
- Make signs and posters (e.g. ballot drop box security poster, mail ballot processing posters, de-escalation posters).
- Develop a crisis communications plan.

Appendix D

Project Plan Template

Project Name:		Goal Release Date:	
Why This Release Date:			
Deliverable(s):			
Owner:		Helper(s):	

This Project Has Succeeded If:		Short Term Goal: (six months)	
Medium Term Goal: (one year)		Long Term Goal: (more than one year)	

Priority	Task Name	Assigned To	Due Date	Status

Appendix E

Project Plan Sample

Project Name:	Video: How Do I Fill Out My Ballot?	Goal Release Date:	August 25, 20xx
Why This Release Date:	The video will be available shortly before voters receive mail ballots.		
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