

## **Election Best Practices – IADR Regions/Divisions/Sections and AADOCR Sections**

IADR/AADOCR Global Headquarters (GHQ) has developed a guide of Election Best Practices to ensure that our volunteer leaders have all of the tools necessary to provide a logical, fair and transparent process of governance to their members. IADR GHQ hopes that this guide will answer many of the questions raised by volunteer leaders and allow for autonomy in future elections.

IADR GHQ suggests creating elections within component groups based on five guidelines:

1. A Nominating Committee or a designated officer develops a timeline for the election.
2. Notices are sent out for candidate recruitment to determine individuals who will be on the ballot and submitted candidates are contacted to confirm participation.
3. The length of the election, number of positions on the ballot, term of officers and voting participation should be decided by the component group (either existing in their governing documents or pre- determined by the Nominating Committee).
4. Anonymous balloting is conducted using an electronic voting system, with members notified by email when the voting is to take place.
5. Upon completion of the election, votes are verified and the results will be announced to the component group membership.

### ***Nominating Committee and Election Timeline***

As a first step, IADR GHQ encourages all component groups to create a Nominating Committee to oversee the election process.

The Nominating Committee may be elected by the membership or be appointed by the existing officers. Some component groups have a Nominating Committee defined as part of their Constitution or Bylaws. The primary function of the Nominating Committee is to promote and manage the governance process and ensure an impartial election.

Alternatively, a designated officer can be in charge of administering the election. This individual will be responsible for all election procedures and will serve as the auditor of the election.

Nominating Committee members and/or officers must be current members in good standing of both IADR and of the component group.

The second step in an election process is to establish a timeline. This normally involves counting back from the date of the election (if the balloting is concurrent with an annual business meeting) or the date at which the results are to be announced. All IADR Regions/Divisions/Sections and AADOCR Sections should take into consideration the dates of their Region/Division/Section annual meeting or IADR General Session/AADOCR Annual Meeting when developing their election timeline.

Additionally, it is recommended that component groups build in at least a week of extra time to allow for an extension on the nomination period (in the event that no nominations are received). This allows for additional nominations to be collected without delaying the start of the election.

## ***Call for Nominations and Candidate Confirmation***

Notice of a call for nominations is the beginning of the nominations process. These calls are sent out via email. IADR GHQ can assist the component group with the email notification or provide data for those component groups that prefer to manage the process on their own.

Some component groups send out a notice of nominations to the members as a separate mailing, while others put the notice in a newsletter.

The call for nominations should clearly state:

- The component group name;
- Positions that are open for nomination;
- Duties/responsibilities and term length for each open position (which should be defined in the component group's Constitution or Bylaws);
- Eligibility criteria for candidates (must be a Member, non-student Member, etc.);
- Information on how to submit nominations;
- What information is required for each candidate (photo, short biosketch or CV); and
- A closing date for nominations.

All candidates for office must be current members in good standing of IADR and the component group. In addition to the nominations made by group members, the Nominating Committee formulates its own nominations. If the nominations for a post are lacking or in any way inadequate, it is the responsibility of the Nominating Committee to either extend the call for nominations or find qualified candidates to stand for election.

Candidate submission can be managed as below:

- Candidates are submitted to the component group directly (the Nominating Committee Chair or another individual in charge of the election). The group contacts the candidates to confirm participation and obtains all biographical information needed. IADR GHQ can assist in verifying membership of candidates if needed.

## ***Election Information***

The length of the election, number of positions on the ballot, term of officers and voting participation should be decided by the component group. Most of this information is available in either existing governing documents or can be pre-determined by the Nominating Committee.

### Length of Election

Please note that if IADR GHQ is fully managing the election on behalf of your component group, you will need to build ample time to allow for a candidate nomination and confirmation period, ballot set up and election.

### Positions on the Ballot

The open positions on the ballot should be determined prior to the call for nominations. IADR GHQ recommends that component groups allow write-in candidates and also provide an option for members to abstain.

### Term of Officers

For most component groups, the terms of elected officers are determined by their Constitution and Bylaws. If this is not applicable, the Nominating Committee should determine the terms of officers prior to the call for nominations so this information can be communicated to the membership. IADR GHQ recommends that officer terms coincide with the IADR General Session or IADR/AADOCR/CADR General Session dates when possible to ensure officer transitions based on the IADR/AADOCR meeting cycle.

### Voter Participation

The Nominating Committee should determine which members of the component group will be eligible to vote in the election. This may also be determined in the Constitution and Bylaws. Some groups do not permit student members to vote, while others allow all current members voting privileges. All voters in the election must be current members in good standing of IADR and the component group.

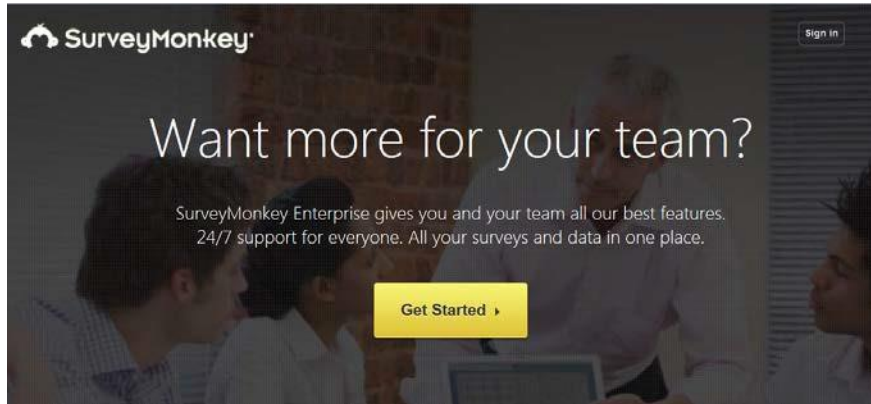
### ***Electronic Voting Best Practices***

#### Electronic Voting Best Practices

IADR GHQ recommends the use of electronic voting to collect ballots via SurveyMonkey (located online at [www.surveymonkey.com](http://www.surveymonkey.com)). SurveyMonkey is an online survey generator in which users can create polls and surveys, including elections. SurveyMonkey offers an option for a free account for surveys with up to 10 questions.

## Appendix 1 – SurveyMonkey Guide

To get started with SurveyMonkey, go to [www.surveymonkey.com](http://www.surveymonkey.com) and click on the “Get Started” Button.



You may have to click another “Get Started” button to proceed.

A screenshot of the SurveyMonkey sign-up page. The SurveyMonkey logo is at the top left. There are "Sign In" and "Help" buttons at the top right. The main heading is "Sign up for your FREE account". To the right, it says "Already have an account? Sign In". The form is divided into two columns. The left column has fields for: "Choose a username:" (with a note "Up to 50 characters, no spaces"), "Choose a password:" (with a note "At least 7 characters"), "Retype password:", and "Enter your contact email:" (with a note "Up to 50 characters"). A yellow "Sign Up" button is at the bottom of this column. The right column is titled "Or sign up with your Google or Facebook account" and contains text: "Now you can link your accounts and sign in to SurveyMonkey using your Facebook or Google account. It's quick, easy, and secure - your SurveyMonkey data will be completely private." Below this are buttons for "Sign Up with Google" and "Sign Up with Facebook", separated by an "or" in a circle. At the bottom of the right column, it says: "By creating an account using your Facebook or Google account, you agree to our Terms of Use and Privacy Policy." A small note at the bottom left of the form states: "By clicking 'Sign Up' you agree to our Terms of Use and Privacy Policy and also agree to receive news and tips via email."

Please choose a username and password for the account. It is recommended that the account be managed by the Chair of the Nominating Committee or a member of the committee.

When you create your account, you will see the home page below.

TITLE	MODIFIED	RESPONSES	ACTIONS
<b>Test Election IADR</b> Created May 07, 2015	05/08/2015	2	

[+ Create Survey](#)

ALL SURVEYS: 1 of 1

To create a new survey, click +Create Survey in the upper right corner of your account and choose from the following options:

- **Build a New Survey from Scratch:** Create a survey completely from scratch. You will start with a single blank page and will need to add and write the questions yourself.
- **Edit a Copy of an Existing Survey:** Create a copy of an existing survey on your account. Themes and other survey design settings will carry over to the copied version of the survey.

Create

THE SETUP

How do you want to get started?

**Build a New Survey from Scratch**

Title \* IADR Sample Election  
You're good up to 250 characters.

Category Select a Category

[Let's Go](#)

Edit a Copy of an Existing Survey

You will need to make a title for your survey. Selecting a category is optional. Then select the Let's Go button.

IADR Sample Election

Summary Design Survey Collect Responses Analyze Results

Page 1 Page Logic More Actions

**BUILDER**

- Multiple Choice
- Dropdown
- Matrix / Rating Scale
- Matrix of Dropdown Menus
- Ranking
- Net Promoter® Score

**QUESTION BANK**

**LOGIC**

**OPTIONS**

**THEMES**

IADR Sample Election

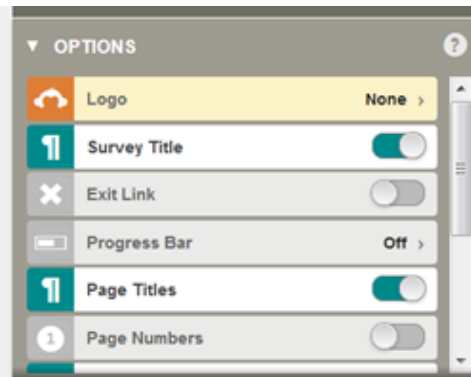
+ Add Page Title

[ Empty Page ]

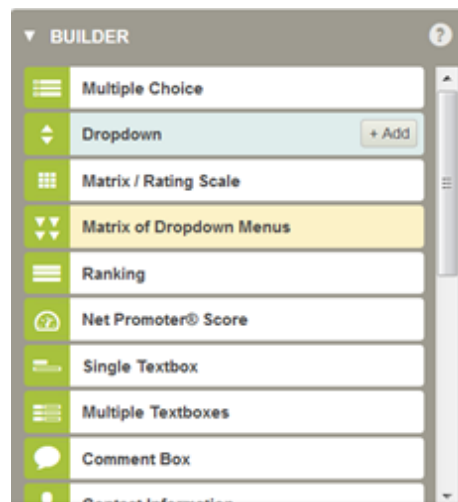
Add a question here by clicking or dragging it from the left.

Your title you entered is automatically included on the survey at the top. You can add a page title if you wish (this is really only applicable for surveys with more than one page).

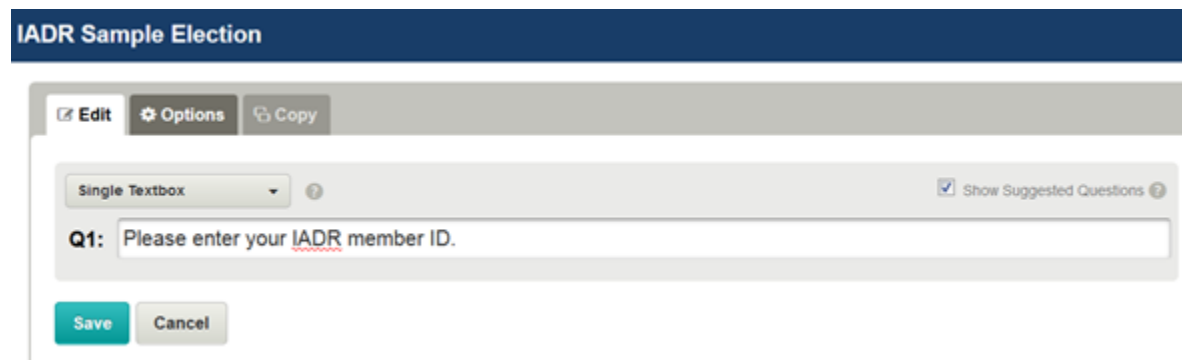
To remove the page title, click on the options tab on the left side of the screen. You can toggle that option off. You can also turn off question numbers and other features on this area.



The first step is to start adding questions to your survey. You can choose from several question types in the BUILDER section of the sidebar. When you add a question, take a look at the options under the Edit and Options tabs to further customize the question.



The most common used questions for ballots are Single Textbox, Multiple Choice and Text.



The single textbox can be used to store the member ID for voting purposes to ensure everyone only votes one time.

IADR GHQ recommends that the member ID field is required for ballots and fits the format for IADR member numbers (which are 5 or 6 digits). To make this item required, select Options under the question. Once this information is updated, you can select the Save Button to save the Options and the Question.

The screenshot shows two configuration panels for a question. The first panel, titled "Require an Answer to This Question", has a checked checkbox and a text area containing "This question requires an answer." The second panel, titled "Validate Answer for a Specific Format", also has a checked checkbox. It includes a dropdown menu set to "a specific length", input fields for "5" and "6", and the text "between 5 and 6 characters." Below this is another text area with the message "The comment you entered is in an invalid format." Both panels have a question mark icon in the top right corner.

The screenshot shows the "BUILDER" interface. On the left is a sidebar with a list of question types: Multiple Textboxes, Comment Box, Contact Information, Date / Time, Text, Image, Text A/B Test, Image A/B Test, and Intro Page. The "Text" option is selected. The main area shows a header "IADR Sample Election" and a question: "\* 1. Please enter your IADR member ID." Below the question is a single text input field.

The next step is to add some directional text for the election. It can be something like "Vote for one person in the position below, or provide a write-in candidate." If you wish to allow voters to abstain (not vote), you cannot require an answer to a question. To add this text information, select the Text option. Type your directions and then select Save.

The Multiple Choice option is the most common question for voting. Below is a sample of how to set this up.

There is an option to allow more than one answer (in the event that you are voting on a position where you can select two choices, such as Directors, Councilors, etc.).

To add the Write-in Candidate, you must select the option marked Add an “Other” Answer Option or Comment

Field, and make this a Comment Field. You only want to make sure the answer is Text for this field.



It is recommended to randomize the list of candidates. You can do this under options. This ensures fair voting as the list of candidates is changed for each voter so someone is not always listed first on each ballot. When you are finished, you can select Save.

**Edit** **Options** Logic Move Copy

Require an Answer to This Question

Change the Layout for How Choices are Displayed

**Randomize, Sort, or Flip Choices**

Randomize Choices for Each Respondent

Alphabetically Sort Choices

Flip Choices for Each Respondent

Do Not Randomize the Last Choice  
Useful if the last choice is **Other** or **None of the Above** and you don't want it randomized.

Adjust Question Layout

Enable Question Text A/B Test (Random Assignment)

**Save** Cancel

Changes to these settings can be seen from [Preview & Test](#).

If you have additional positions, you can continue to add questions (up to 10 questions total).

**\* 1. Please enter your IADR member ID.**

Please vote for one candidate or provide a write-in. To abstain, you may skip this question.

**2. President**

- Jim Smith
- Jane Doe

Write-in Candidate

Done

You can also customize the “Done” button to say something like “Submit Vote.”

It is important to preview the election and test before making it public. To do this, click on the button marked

Preview & Test (located in the upper right corner on the Design Survey tab).

This will open a test version of your election in a new window. This version of the survey will allow you to see exactly what the respondents will see when they take the survey, however, no data will be collected or recorded.

Once you have tested your ballot, you are ready to distribute it to your members. To do so, you need to create a collector to distribute it. Survey responses are then recorded directly in your account.

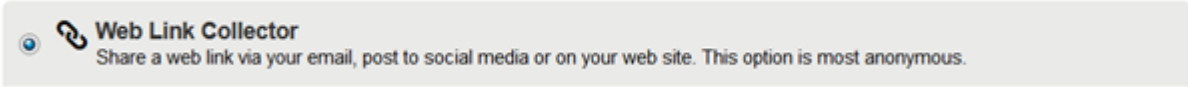
You can create multiple collectors per survey to reach respondents through various channels. To start collecting responses:

- Go to the Collect Responses tab.
- Choose the preferred collector type based on your survey needs and click Next. (If you already have a collector, click + New Collector in the upper-right corner of your collector list.)
- Edit the collector options to customize your respondents' survey-taking experience.
- Send the survey.

IADR GHQ recommends either the Web Link or Email Invitation Collector Types for component group elections. **Only one type of collector is needed for your election.** If your group requires assistance from IADR GHQ to send a broadcast email to members, please contact us for further instructions.

Below is information on how to set up each Collector Type.

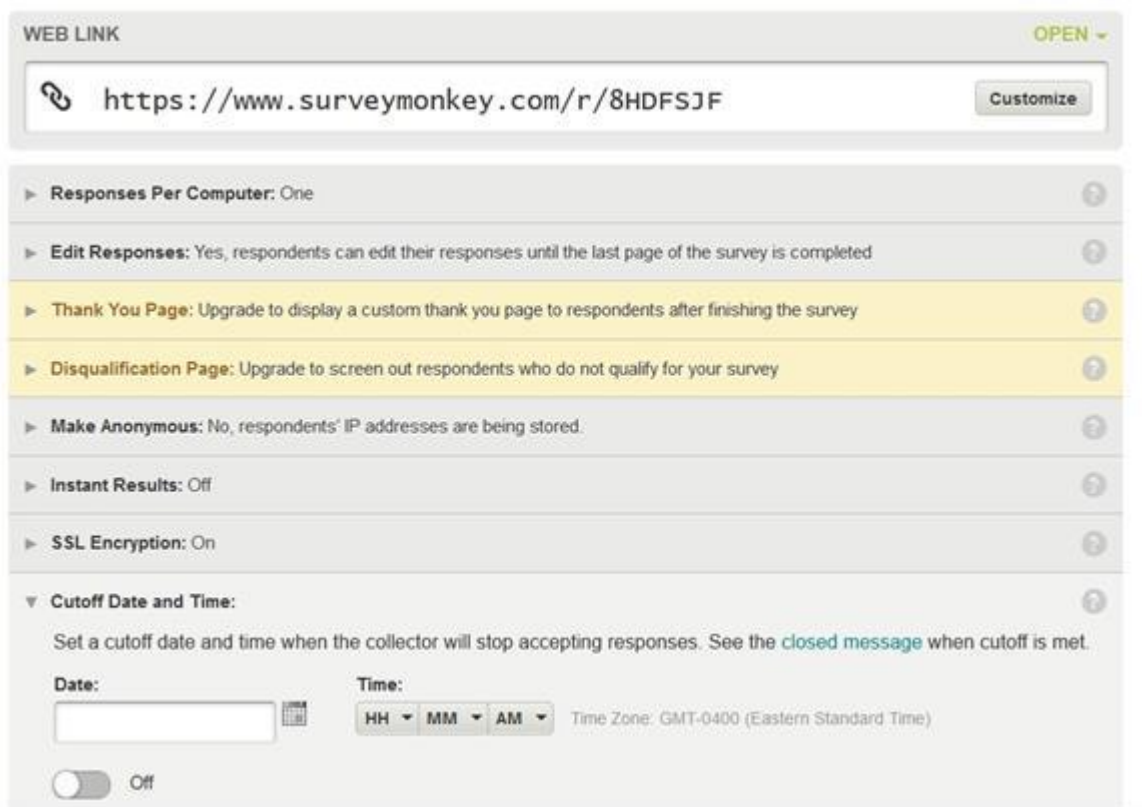
### Web Link Collector



**Web Link Collector**  
Share a web link via your email, post to social media or on your web site. This option is most anonymous.

On the Collect Responses tab, select the option for Web Link Collector and hit the Next button.

The next page will show a custom link for your ballot. This link can be copied and inserted into an email to send to your group members. There are also additional customization options.



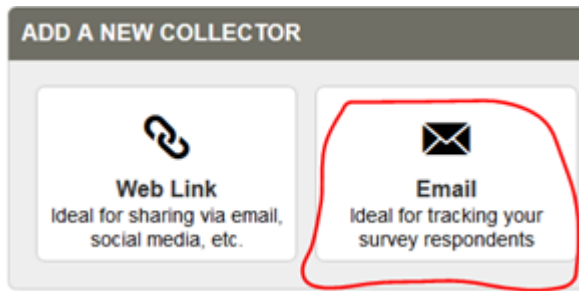
WEB LINK OPEN ▾

<https://www.surveymonkey.com/r/8HDFSJF> Customize

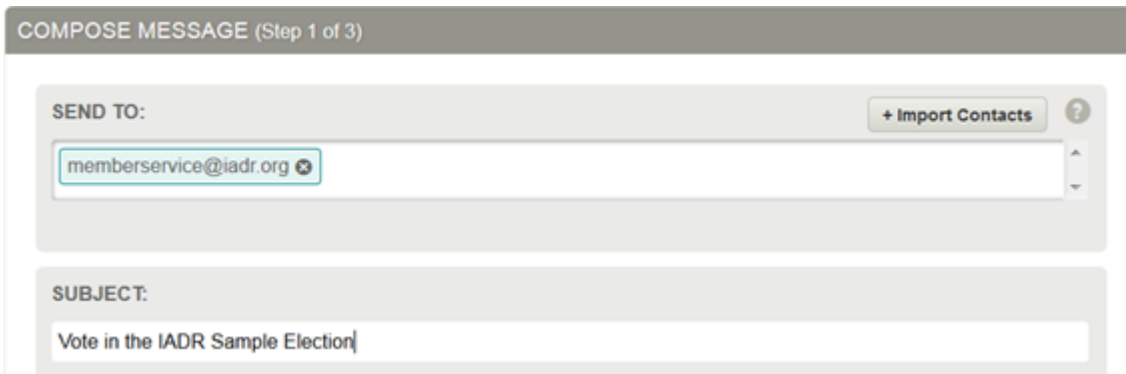
- ▶ Responses Per Computer: One ?
- ▶ Edit Responses: Yes, respondents can edit their responses until the last page of the survey is completed ?
- ▶ Thank You Page: Upgrade to display a custom thank you page to respondents after finishing the survey ?
- ▶ Disqualification Page: Upgrade to screen out respondents who do not qualify for your survey ?
- ▶ Make Anonymous: No, respondents' IP addresses are being stored. ?
- ▶ Instant Results: Off ?
- ▶ SSL Encryption: On ?
- ▼ Cutoff Date and Time: ?  
Set a cutoff date and time when the collector will stop accepting responses. See the [closed message](#) when cutoff is met.  
Date:  Time:    Time Zone: GMT-0400 (Eastern Standard Time)  
 Off

You will need to set a cutoff date and time for the ballot to close. You can also modify the closed message in this area as well.

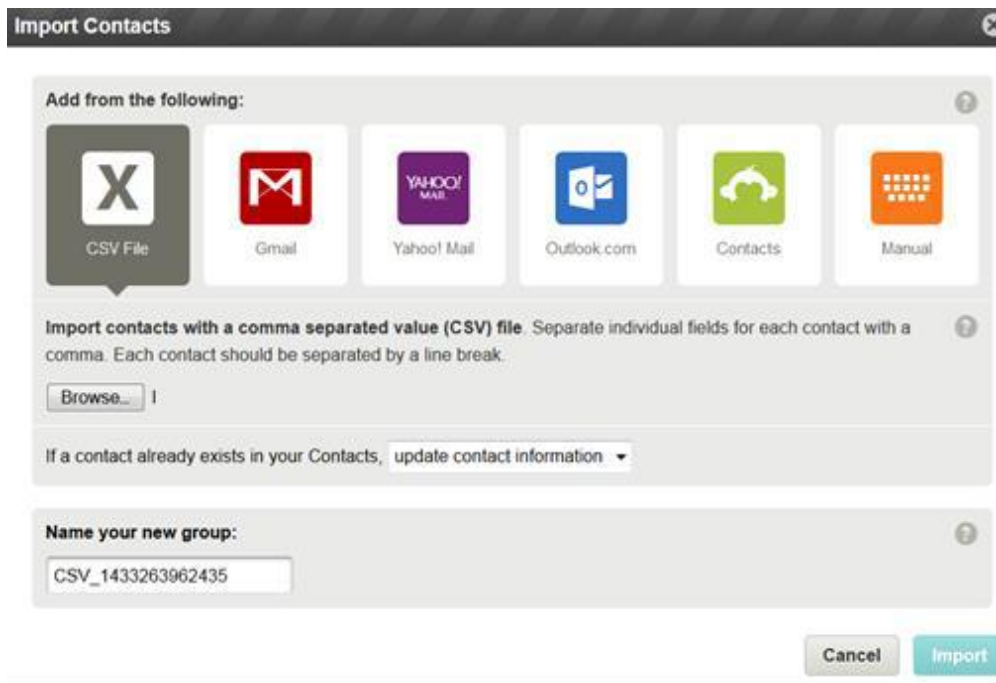
## Email Invitation Collector



Under Add a New Collector, select the option for Email to create an email invitation collector.



The first step with the email invitation collector is to import your contact list. Click the button marked + Import Contacts.



IADR GHQ can send you a list of group members as a comma-delimited Excel file (.csv), which is the easiest way to import.

In the .csv file, each contact needs to be on its own row in the spreadsheet, and the columns must be ordered as follows to match how they appear in Contacts:

Email, FirstName, LastName, CustomData1, CustomData2, CustomData3, CustomData4, Custom 5, Custom 6

You do **NOT** need to have values in Custom 1 through Custom 6 if you are not tracking other items. IADR GHQ recommends using the Member ID as the Custom 1 field.

Once you have uploaded your contacts, you can then edit your message.

SUBJECT:  
Vote in the IADR Sample Election

MESSAGE: HTML Template Plain Text Custom HTML ?

Header  
IADR Sample Election

Body  
Insert Custom Data... ?

**B** U *I* [List Icons] Font Family Font Sizes [List Icons] [Undo] [Redo] *Ix*

[FirstName] [LastName]  
Member ID: [CustomData1]

Dear [FirstName] [LastName],

Please vote in the IADR Sample Election by clicking the button below. Your participation is appreciated!

You can edit the subject, header, color of the header, and body text. IADR GHQ recommends adding custom data such as First Name, Last Name and Member ID to the email.

You can also edit the text on the button to vote.

Button  
Click Here to Open Ballot

Once you are done customizing your email message, hit the Save button. You will have an opportunity to preview your email invitation and make any edits. If everything is finished, click the Next button.

On the next page, you will need to set up your email address to send the survey. The sender email address is a collector option available when using the Email Invitation Collector. The sender email address is used in the following ways:

- The sender email address is what recipients see in the *From* field of your email invitations.
- We send replies to your email invitations and any bounced messages to the sender email address.
- Test emails sent from the Schedule page are sent to the sender email address.  
BASIC users need to verify a sender email address in order to send email invitations.

**REVIEW OPTIONS (Step 2 of 3)**

▼ **Sender Email Address:** ?  
Verified : mesguerra@iadr.org  
[Change](#)

▶ **Custom URL:** Upgrade to use research.net instead of surveymonkey.com for your survey's URL ?

▶ **Response Editing:** On, until survey complete ?

▶ **Anonymous Responses:** Off ?

▼ **Instant Results:** ?  
 On, show results to respondents.  
NOTE: Some questions, such as open-ended questions, will not be displayed.  
 Off, do not show results to respondents

▼ **Cutoff Date and Time:** ?  
Set a cutoff date and time when this collector will close and stop accepting responses. [Edit "survey closed" message](#)  
 On, close this collector on a specified date and time  
**Date:**    
**Time:**     
Time Zone: GMT-0400 (Eastern Standard Time)  
 Off, accept responses until you manually close this collector

You will want to click the link marked Show Advance Options so you can set the Cutoff Date and Time for the collector (which will close the ballot).

When emails are sent from SurveyMonkey, recipients see the sender email address listed in the *From*

field when viewing a message from their

inbox. [Sender Email Address] via

[surveymonkey.com](https://www.surveymonkey.com)

Upon opening the message, recipients may see some additional required information in the *From* field. The exact format depends on your email client.

For example: survey-noreply@smo.surveymonkey.com on behalf of [Sender Email Address] via surveymonkey.com<member@surveymonkey.com>

Each respondent only sees their own email address in the *To* field. Recipients can't see the email address of any other recipient.

After you compose your message, you can enter your preferred sender email address when choosing your collector options.

You can edit the sender email address for an existing collector from the Options tab. If you edit the sender email address, it's applied to all new or unsent messages sent through that collector. You can only use one sender email address per collector at a time.

If you have a BASIC plan, we require you to verify a sender email address the first time you use it to send email invitations from your account. If you don't verify your sender email address, you won't be able to schedule or send your email invitation.

To verify your email address:

- After you compose your invitation message, click Sender Email Address from your collector options.
- Click Verify Email Address.
- Go to your email inbox and open the verification email you received from SurveyMonkey
- (noreply@surveymonkey.com). If you don't see the email, please check your spam or junk folder.
- Click the verification link in the message. This verifies your email address and redirects you to SurveyMonkey.
- Schedule your message.

Once you have set up your options and/or verified your sender email address, you can click the Next button.



**SCHEDULE (Step 3 of 3)**

**Send Now / Send Later** ?

Send now.

Schedule a later date and time to send.

**Summary**

**1**  
People total

**Sender Email Address:** mesguerra@iadr.org via surveymonkey.com

- Respondents are not anonymous
- Respondents can edit responses during the survey only
- Survey link domain is www.surveymonkey.com
- Custom thank you page is off
- After survey, respondents go to www.surveymonkey.com
- Disqualification message on
- Instant results are off
- Cutoff date and time set
- No maximum response count
- No IP access
- No password protection

[← Back](#) [Resume Later](#) [Test Email](#) [Send Now](#)

It is recommended to send a Test Email before you send the actual email. The test email will be sent to the sender email address.

Once you have sent a test email and confirmed your ballot is correct, you can either send your ballot now or schedule a later time to send. If you select the Send Now option, the message will be scheduled for approximately 5 minutes after you click the button.

When your message is sent, you can then view information about the message in the Collect Responses tab.

From this tab, you can send a reminder to those people who have not voted after a certain period of time, and also invite additional voters if needed.

You can view and analyze your results at any time during the collection process in the Analyze Results tab of the survey. Here you can see a summary view of your data and browse individual responses to questions.

## IADR Sample Election

Summary Design Survey Collect Responses Analyze Results

← ALL COLLECTORS

### EMAIL INVITATION 1 OPEN

Overview Recipients Options

**1**  
Total invitations

**OF 100% INVITED**

- 0% responded (0)
- 0% opted out (0)
- 0% bounced (0)
- 100% not responded (1)

**0**  
Total responses

**OF 0% RESPONDED**

- 0% complete (0)
- 0% partial (0)

MESSAGE HISTORY + Invite More Send Reminder Send Thank You

6/2/2015 Sent invitation message to 1 contacts

If you are using a BASIC account on SurveyMonkey, the easiest way to view the results is by each question individually. If you wish to be able to export results or other advanced features, you may upgrade to a paid account.

