Voter Guide
LWV Manual

This manual takes you through all the steps you need to create your Voter Guide - from prep to publish. It is divided into four parts - which correspond to the order in which you'll be creating your guide:

- **Research** - prepping before setting up your guide online.
- **Set-up** - putting together the framework of your online guide.
- **Communication** - inviting, editing and approving candidate responses.

At the end, you'll find an appendix on advanced features - district sets and composite districts - as well as instructions on exporting your data for print.

⇨ If you are familiar with building a voter guide or are facile with learning new online systems, you can follow the basic steps to setting up a voter guide - which are bulleted like this sentence. We recommend, however, that you also note the best practices - **BP**.

> **Why's, how's and best practices**: Along the way, we'll offer additional guidance - that will look like this sentence - if you don't want to miss a beat.

> **BP** **When to launch:** Ideally, at least 3 weeks before election day or in conjunction with the beginning of early or absentee voting. Most readers will use the guide in the days right before an election, but launching earlier generates extra page views and gives time for troubleshooting.

> **BP** **When to start building your guide***:* The whole process usually takes about four weeks - but you can do it in as little as two. We recommend, however, starting 6 weeks before your launch date.

Research

The first thing you need to do is research the races you're covering - and decide what information you want to ask candidates. We suggest getting started on both steps at the same time.

> We recommend starting Research at least **4 weeks before your launch -** allowing **1 week to complete.**

Selecting and researching the races.

⇨ Decide which races and referenda you're covering.

> **How to find which seats are being contested***:* Contact your county's board of elections and/or your secretary of state.

> **BP** **How many to feature:** The more races you run the more value for your readers - and more page views for you. We recommend featuring *at least* the presidential, US congressional, statewide and state legislative races, as well as state referenda.

⇨ Research candidates' names, party affiliation and email address.

> **How**: Your county board of elections and local political parties are good place to start. Email addresses can also often be found on candidate websites.

Deciding what information you want from the candidates.

⇨ Choose what questions to ask the candidates.

> **Grouping your questions:** See if there are common questions you will ask in all races or types of races, for example, congressional races or state legislature races. You'll be able to group these as "question sets" that will make it easier to put together your guide.

⇨ Decide what biographical information to include.

> **What you can include**: Anything. The guide includes suggested biographical fields for candidates to fill out (education, family, hometown, etc.) but you can add any field that comes in the form of text, age, a URL, an email - or even a YouTube video. We recommend having no more than seven pieces of biographical information.

> **Grouping your bio fields**: If ithere are common bio data you want for different kinds of races. You'll be able to group these as "bio field sets."

Now you're ready to start building your guide!

Set up

⇨ Log on to your admin page

> **Reminder**: To log in visit
> http://hq.thevoterguide.org/login/hq.do. Enter your user
> name and password to proceed.

<div style="float:right; border:1px solid black;">
We recommend
starting the online
set-up at least **3
weeks before
your launch –**
and allowing **1
week to
complete.**
</div>

Before you start entering races

⇨ Enter the "question sets" you want to use for your races. A question set is a
group of questions that you will ask every candidate in a race. Once created it
can be used for multiple races.

> **How**: On the left hand side, click on "Question Sets." Give a name to the set of
> questions you'd like to add (eg. State Senator Question Set) in "new question set" and
> click add. Then click "edit" next to the question set you just created. In the box
> offered, type in your questions – separated by a carriage return (i.e. one to each line).
> Then click "add." You can always go back and add or edit your questions later.
>
> **Question types:**
> Each Question can take one of the following types:
>
> **Normal**: Solicits a text based response from candidates
> **Agree/Disagree**: Used to get a candidates to agree or disagree to a policy postion.
> **Section**: Use this question type to group questions together.
> **Youtube**: Use this if you wish to solicit a video response from a candidate.
>
> **Character limits for questions**: On the top of the question set page, you can set the
> global character limit for answers to questions.

⇨ Enter the "bio fields" you want to use for your races. Bio fields are the group of
biographical information that you want the candidates to give you. These should
be non-controversial, and in general candidate answers should be brief.

> **Why**: For every race you will need to select a set of bio fields for the candidates to fill
> out. You can create and use the same set for all races or customize bio sets for
> different kinds of races. For example, you may want to include a "military history" field
> for presidential elections which would make less sense for a school board.
>
> **How**: From the left hand side, click on "Bio Fields." At the top of the page, add any bio
> fields you need. Click on the "edit" link next to the field you created. In the "type"
> drop down, select whether you want a bio field that is:
> - text,
> - Age, which will prompt the candidate for their date of birth (will render on the
>   front end as an age)
> - a URL (web sites will render as a pop-up link in the guide)
> - an email address (will likewise become a "mailto" link)
> - HTML (allowing you to use images, audio or video)
> - YouTube video (allowing candidates to simply enter the URL of a YouTube video
>   to automatically insert a resized video into their profile).

Creating "bio field sets."

- Scroll down to the bottom of the "bio fields" page and enter the name of the bio field set you're creating (eg. Congressional Bio Field Set), next selecting the fields you'd like to add (using the "control" button to add multiple fields). Click on "add". You can "edit" to add new fields or adjust the order in which you'd like them to appear using the up and down arrows. Set up as many bio field sets as you need.

BP **How many bio fields?** We recommend including 5-7 bio fields for each candidate.

Non-candidate editable bio fields. You can include fields that are only filled out by you, *not* the candidates (for example, links to articles on your site). Click on "edit" by a bio field and in the drop down box "candidate editable" select "off."

Character limits for bio fields: As with question answers, you can set character limits for bio fields. Go to the "bio fields" page. Click on edit next to the bio field you'd like to limit. Enter the character limit in "max length."

⇨ Select and order race categories.

Why: To set the order of the races your readers click through – and for easy browsing - you can group your races (President, US Congress, State Senator, City Alderman, etc.) and place them in the order you like.

How: From the left side, click on "Race Categories." Add the categories you want and, on the same page, change the order of the races by clicking the arrows next to each race category.

⇨ Add any unique parties in your local races.

Why: When entering candidate information, you'll be required to include a code for the candidate's party affiliation (D for Democrat, R for Republican, etc.). Your ToolKit comes with default parties included; you'll need to create a code for any parties you want that are not in the guide.

How: From the left side click on "parties." Enter any party you need along with an abbreviation that works for you.

Now you're ready to start entering races.

Setting up races

The Race Wizard will walk you through step by step the creation of a race. Choose the type of race you will be creating and follow the prompts.

You can make changes to the races after you have set them up.

You can also use our old sytem for entering races described below:

Setting up races

⇨ Enter the races you're covering.

> **How**: From the admin home page, click on "races." In the box provided, you can enter one or many races at a time (clicking the carriage return between races). You can always add more races later from the same page.

> **Referenda and ballot initiatives**: If you're including referenda or ballot initiatives, check the box at the bottom of the form. When creating a referenda, the voter guide will automatically insert the "candidates" as "yes" and "no." Otherwise, your set-up is similar to setting up a candidate race. You can choose to use questions (which you or, possibly, different advocacy groups can fill out) or to leave questions off.

⇨ Fill out race information.

> Once you create your races, click on any race link (which you'll find on both the "races" and "campaign tracker" pages).

⇨ *Change name*: as it says, this is where you can change a race's name.

⇨ *Description*: The description will appear at the top of the page readers see for the race. In this field you can be creative - in content and form. Using text or HTML, you can describe the race, link to your publication's endorsements or related articles, include maps or even video.

> Description timeline: the description isn't included in the information sent to candidates so it is not necessary that you complete it at this time; you can hold off on adding the description until after the invitations to candidates go out.

⇨ *Define voting district*: use the drop down menus to select state, type of race and specific district (if it's a state-wide race, you won't need the third drop down).

> **Districts in the guide:** Your toolkit comes with geographical districting information for statewide, US congressional races, county races, and both houses of your state legislature races.

> **What's not in the guide - but what you can add**: You can include additional races - that either fall within other districts or cross districts - by using the district set or composite districts features which are explained at the end of the manual.

⇨ *Number of selections*: for most races, this will be "single choice," but for some local races, such as school board, you can allow users to select multiple

candidates. (Note: candidates will have to be entered before selecting the multiple option.)

⇨ *Race state*: select if this is a primary or general/open election. If you select primary, the voter guide will automatically split candidates into separate races based on their party affiliation. If this is an "open" primary (that is, voters can vote for candidates in any party) or a general election, select "open/general;" all candidates will appear to all of your users.

⇨ *Race category*: choose the "race category" for this race (see "select and order race categories" above, page 3 if you need to add additional categories.)

⇨ *Bio field set*: select the bio field set for this race (see "enter bio fields" above on page 3 for how to set up bio fields)

⇨ *Questions*: you can select from one of the "question sets" you created. (see page 3 on how to entering question sets.)

⇨ *Candidates*: list the candidates included in the race, being sure to include all requested info - last name, full name, email address, party affiliation - with commas in between:

Lincoln, Abraham Lincoln, abe@savetheunion.org, R
Roosevelt, Franklin D. Roosevelt, frank@overthere.net, D

If you don't see an abbreviation for a party affiliation, you can add one (see "add any unique parties" on page 4).

⇨ **BP** **Save your work**! Be sure to click "save" before moving on.

Managing and editing races

Once your races are in, you can edit them one by one by clicking on their links (from the "races," or "campaign tracker" pages). you can also edit your races in bulk, using your race manager.

⇨ Edit your races in bulk

Why: the race manager makes it easy to make changes to all of your races, for example, changing the question set for all your state legislature races.

How: Click on "race manager" on the left hand side. On the top half of the page, select the races you want to change. Scroll to the bottom of the page to make the changes you'd like and hit submit. For example, you may want to change the question set for all your US congressional races; at the top, click the box next to the US congressional races, scroll down to "question sets" and drop down to the question set you'd like to use and, at the bottom of the page click "submit."

Now that your races are set up - you're ready to start inviting candidates.

Candidate Communication

Okay, almost ready; you're still a couple of steps away to sending out emails…

⇨ Edit your email templates

> We recommend inviting candidates at least **3 weeks before your launch -** and giving candidates **2 weeks to respond** which will leave you **1 week to hound down** late responders.

> **Why**: the toolkit generates automatic emails for every step of communication with the candidates; you must tailor these emails with your information.

> **How**: from the home page, click on "email templates." For each template you'll see fields with number signs (eg. #candidate_name()); those you can ignore, as they'll be filled in automatically by the toolkit. What you do want to change are the fields in capital letters. ***We also strongly recommend you re-write the emails to fit you.*** You can also include additional merge fields, as listed in the box below.

> **Additional merge fields:**
>
> #question_list() Displays the questions for the candidate's race
> #candidate_name() Displays the candidate's full name
> #contact_name() Displays the contact name for a candidate
> #response_url() Displays the URL link where the candidate can input his/her response (invite, remind & reject emails only)
> #security_code() Displays the candidate's 8-digit password.
> #race_name() Displays the name of the race
> #race_url() Displays the URL link to the candidate's race page (only when race is "published")
> #candidate_url() Displays the URL link to the page displaying the candidate's answers (only when race is "published")

> **BP** **Setting deadlines**: be sure to include a deadline for candidates' responses. ***We highly recommend making that deadline at least a week before you actually need their responses in.***

⇨ Add the contact name and contact email you'd like candidates to use if they have any questions.

> **How**: from the home page, click on "appearance" where you'll see fields for the contact name and contact email.

⇨ Invite your candidates!

> **How**:
>
> You can invite one, multiple or all of your candidates at once. Click on "campaign tracker and make sure you're on the "campaign centric" view. You'll see candidates have an arrow in the "created" column. Simply click on one arrow to invite a single candidate. Invite some or all candidates by checking the box next to the selected candidates' names and clicking the arrow at the bottom the "created" column.

> **Troubleshooting bounced emails: wrong addresses and AOL spam**
>
> You'll know emails bounce - both by receiving returned emails in your admin's email box and by a red "@" sign next to the candidate's name in the "campaign tracker."
>
> Research to see if there is an alternate email address. Linking to the candidate's page from the campaign tracker, you can add in the new address - and then re-invite the candidate from the campaign tracker.
>
> One thing that may be going on is that the candidate is using a spam blocker. A simple solution is to email the invitation to yourself, then forwarding the invitation to the candidate.

⇨ Monitor to see if candidates have responded

How: to see if candidates have submitted their responses, check back with your "campaign tracker." If they have, you'll see a double arrow in the Resp. column.

⇨ Remind candidates to fill out their responses.

When: Whenever you think appropriate, but certainly if you haven't heard from them by your deadline.

By email: you have the option of generating an automatic email reminder to candidates. Go to your campaign tracker. In the "invited" column you'll see an "@" sign. Click on it and you will get an automatic email that you can edit. Send multiple candidates reminders by selecting them and hitting the "@" at the bottom of the "invited" column.

By Phone: feel free to get in touch with candidates the old fashioned way - by phone.

⇨ Approve - or reject - your candidates' responses.

Why: because you're in charge. If for any reason you need to reject a candidate's response, you can give them a chance to modify their responses.

How: on the campaign tracker, look under the "resp." column and click on any double arrow in that column to review a candidate's responses. At the bottom of their page you can approve or reject their responses. Approving will move them to the final "approved" column. Rejecting them will give you an automatically generated email that you can edit to describe the specific reasons for not accepting their responses.

⇨ Publish your races.

Why: races won't appear on your guide until they are "published."
How: go to the campaign tracker (for comprehensive packages, make sure you're in "race centric" mode). In the right column of the race you're publishing, click on "Y."

Final touches & going live

Now's the time to set the appearance of your Voter Guide.

How. Click on the "appearance" link from your admin home page.

> We recommend finishing up the publishing details **2 weeks before your launch - during the time you're also communicating with candidates**.

⇨ *Title*: the "title" of the voter guide which will appear in the web browser.

⇨ *Guide width*: set how wide - in pixels - the guide will appear within the frame of your template.

⇨ *Ballot header*: you can include - in HTML - a specialized header that will appear on the ballot that your users print out – or email they send themselves. This is an opportunity for branding for your publication or your sponsor.

⇨ *Address form instructions*: you can edit the instructions users see in the initial screen users see asking for their address.

⇨ *No response*: you can select the text you'd like to appear next to a question when a candidate has not responded. (Note: bio fields that are not completed by candidates will not appear in their profile.)

⇨ Complete race descriptions

If you have not done so already, edit the descriptions that will appear at the top of each race. (See "race description" on page 4)

⇨ Publishing for your users

Before the information can be seen by your users you need to have first approved the candidate answers, then made sure the races are published, and then finally clicked the go live button on the top of the admin screen.

Appendix

Advanced districting

You can include races that do not fall along congressional, state or county district lines. Your first option will be to use GIS districts which will match a user automatically. If GIS is not available you can create a "district set," for smaller districts and a "composite district," for larger districts

Creating GIS Districts

GiS is a mapping system. In order to use our GIS functionality you must first have the proper data. This will include three pieces of data for each set:

A .shp file which has the polygons
A .dbf file that has the attributes of the map
A .prj file which tells us where this map exists.

Once the GIS Districts have been created they will show up in the state column for districting purposes.

Creating District Sets

⇨ Click on District Sets from you admin home page.

⇨ Your district set name: Then type a name under Create a New District Set and Click add. The "name" will be in the form of a question.

> ⇨ If there is one race within the district, the name will be a yes/no question. For example, if there is a mayoral race in Center City, which is in Jefferson County, the name would be "Do you live in Center City?"

> ⇨ If there are multiple races within the district, the name will be in the form of a multiple choice question, eg "Do you live in one of these cities?"

⇨ Where your district set is: Once you create a district set, it will appear at the bottom of the page. Click edit. Now select the district that the "district set" falls within. For instance, if I am creating a district set called towns and cities of Nassau County, I would choose New York State, then County Level, then Nassau.

⇨ Listing the race(s) within that district: Once the district set has been created you can then assign races to the new geography. On the "district set" page, find your district set.

> ⇨ If you created a district set with one race and a yes/no question, list the races as "yes" and "no" (with a carriage return between the two).

> ⇨ If you created a district set with multiple races, type in the names of the races that fall within that district (with a carriage return between each race).

⇨ Assigning the district set to the races: Now that you have created a district set,

return to each race's "edit/manage race" page. You will see in the districting drop downs that your "district set" now exists as an option.

Creating Composite Districts

⇨ Click on "composite districts" from your admin home page.

⇨ Using the drop downs, select the districts you wish to combine.

⇨ Click edit by your new "composite district" to edit its name.

⇨ Assign the new composite district under its race's "edit/manage race" page.

Exporting and printing

You can export your guide into many data forms. From the bottom of your admin home page, click on "data export."

XML Outputs

Normalized XML: If you are familiar with XML, this is the best, most flexible output. You can manipulate the data using an XML editor (e.g., XMLSpy), and customize it for upload into your publishing system.

Candidate Profiles: While this format uses XML tags, it is not normalized, meaning that some data elements are repeated. Candidate responses are grouped by candidate, and the text of each question is repeated within each candidate profile. This is appropriate for a format organized into candidate profiles.

Answer Comparisons: Like the XML Candidate Profiles, this is not normalized. Candidate responses are grouped by race, so a single question is followed by multiple candidates' responses. This is appropriate for a format organized into comparisons of candidate responses.

Text Outputs

Candidate Profiles: This is a plain text format, so there are no tags that indicate what each data element is (e.g., race name, etc.). Candidate responses are grouped by candidate, and the text of each question is repeated within each candidate profile. This is appropriate for a format organized into candidate profiles.

Answer Comparisons: This is also a plain text format. Candidate responses are grouped by race, so a single question is followed by multiple candidates' responses. This is appropriate for a format organized into comparisons of candidate responses.

HTML Outputs:

Candidate Profiles: This is an HTML format, meaning that header tags are used to indicate data elements such as race and candidate names. Candidate responses are grouped by candidate, and the text of each question is repeated within each candidate profile. By combining this format with style sheets, you could create flat HTML pages for your Web site.

Answer Comparisons: Also an HTML format, candidate responses are grouped by race, so a single question is followed by multiple candidates' responses.

Delimited Outputs

Mail Merge: Candidate names, addresses, email addresses, and security codes, in a tab-delimited text file. Use this output if you are creating a list of candidate contact info for a direct mailing.