

LWV Texas

VOTE411 Local League Checklist 2018


This document is a supplement to the LWVUS VOTE411 Online Candidate Information How-To 2018 manual. It provides additional tips, some alternate ways to enter data, and sample email templates. You can use this supplement as a checklist, with more detailed information in the LWVUS manual.

Gather data to be entered into VOTE411.





- ✓ List of races and candidates (party and email address for each candidate)
- ✓ Questions for each type of race (including translations to another language, if applicable)
- ✓ List of background information to be requested of candidates
- ✓ GIS (Geographic Information System) data or other information to create districts, if needed
- ✓ Wording for invitations, acknowledgments, reminders and other communications to candidates

General Instructions for VOTE411 data entry.



- Logon to <http://lwv.thevoterguide.org/login/hq.do>, enter your username and password. You will see a screen similar to the one below. This screen gives you a snapshot of the data already entered:

Admin Home 


Races:

published:	
having questions:	
having description:	
having candidates:	

Candidates:

status:	
having photo:	

Additionally, you have **15 race categories**, and **197 questions** defined.

Need help?  Read the FAQ, or contact us by email at helpdesk@thevoterguide.org.

- Use the menu of functions at the left to select the screen you want to use.
- Context-specific help is available on each screen. Click the “i” button at the top or bottom of the screen.

Enter set-up data into VOTE411.

- Define bio fields and sets to specify the biographical information you want candidates to enter. Create a bio field for each type of information you want, then combine bio fields into a “set” to be associated with one or more races. A Photo field and an Occupation field are automatically included for each candidate, but do not show on the bio field list. Also, there is an Email field in each candidate profile that is used to send email to the candidate from VOTE411 but is not displayed to the public.
- Enter email templates for invitations, receipt acknowledgments, reminders and other communications to candidates. (See examples at end of this document.)
- Enable multiple languages, if you want to allow questions and responses in languages other than English. When a user accesses VOTE411, he or she can select the desired language. If a question/response is not available in the selected language, English will be shown as the default. The selected language affects only questions and candidate responses; general instructions will appear in English.
- Enter questions for each type of race. You only need a question set for each type of race (e.g., city council), not for each individual race. If you want the questions to appear in a language other than English, you will need to enter the translation for each question.
- Define race categories to specify the order in which you want races to appear in your guide. You only need a race category for each type of race (e.g., city council), not for each individual race. In general, you may want a race category for each question set.
- Upload GIS (Geographic Information System) data or other information to create districts for your races. GIS districts are the most precise districts; the user’s home address is used to look up which district they are in. Composite Districts allow you to define a district as a composite of previously defined GIS districts, e.g., a composite of several counties or cities. District Sets allow you to ask users a question or select from a list to determine if they live in a defined district. District Sets are often misused and lead to errors in which voters throughout the state are presented with confusing choices. Please use them carefully and ask for help, if needed, in creating them. **All districts created by local Leagues should be contained within a county, city, school district or other special district.**

Enter races and candidates.

The LWVUS manual describes how to create races and enter candidate information using the Race Wizard and possibly a spreadsheet upload. An alternate method is also available, and may be a clearer process, where you can control each step. It also allows you to modify races you created for a previous election.

Using **Races & Initiatives**, you create a race by giving it a name, and then edit the race to set up the remaining attributes. You can create multiple races at the same time by entering race names separated by carriage returns in the Add Additional Races box. Then they must be edited individually.

Naming Conventions

Be sure to follow the race naming conventions described in the LWVUS user manual to ensure clarity and consistency in the race index.

Race Definitions

When you edit each race, you will need to provide the information listed below, most of which has been previously defined in VOTE411:

- *Description*: An entry in this field is optional. Whatever you enter will appear just below the race name when the race is published. This can be any description that you want, e.g., qualifications for and/or responsibilities of the office, voting information, etc. Sometimes it's helpful to put which election this is for (election name and date), especially if there are published races for two elections at the same time (e.g., a statewide constitutional amendment election and a city election).
- *District*: There are three fields here that determine which races the user can vote in, as determined by the home address. The first field should be set to "Texas." The second field selects the type of district within the state (Texas Districts, Special Districts, or GIS Districts), and the third field selects the specific district of that type. For example:
 - Texas, US House District, Congressional District 1
 - Texas, County, Collin
 - Texas, GIS District for Collin County Commissioners, Precinct 1
- *Number of Selections*: Single Choice means the voter can vote for only one candidate in the race. This is the default, and the only selection that can be entered at this time. If you have a race, such as a city or school board election where voters can vote for two or three candidates out of the field, the appropriate number of selections can be changed in Race Manager (see description of **Race Manager** below).
- *Race State*: Closed Primary (limited to one party) or Open/General Election.
- *Race Category*: Select one of the race categories previously defined. This will determine where this race will appear in the general order of races on the ballot.
- *Bio Field Set*: Select one of the bio field sets previously defined. This will determine what background information will be requested of the candidates in this race.
- *Questions*: Select one of the question sets previously defined. This will determine what questions will be asked of the candidates in this race.
- *Candidates*: You can add candidates to the race now or later. For each candidate, provide the last name, full name, email address, and party affiliation, separated by commas; put each candidate on a separate line.

Note: VOTE411 has the following pre-defined party affiliations: Democratic (Dem), Republican (Rep), Independent (I), Reform (Rfm), Green (Grn), Libertarian (L), Other (O). You can use the **Parties** function to define other party abbreviations if needed.

Sample races

Race Name: Texas US House District 3

Description: 2-year term. Must be 25 years or older, a U.S. citizen and a resident of Texas. Responsible for representing the citizens of the district in which he or she is elected in the U.S. House of Representatives.

District: Texas, US House District, Congressional District 3

Number of selections: Single Choice

Race state: Closed Primary

Race category: U.S. Representative

Bio field set: All Races

Questions: U.S. Representative

Candidates: Enter as last name, full name, email address, party affiliation:

Brown, Joe Brown, electjoe@yahoo.com, Rep

Doe, John Doe, electjohn@yahoo.com, Rep

Smith, Dan Smith, electdan@yahoo.com, Dem

Williams, Sam, electsam@yahoo.com, Dem

Race Name: Collin County Court at Law 2 Judge

Description: 4 year term. Must be 25 years or older, a U.S. citizen, a practicing lawyer, a resident of Texas and a resident of the county. Responsible for cases including misdemeanor or criminal cases, class C appeals, civil matters, mental health cases and probate matters.

District: Texas, County, Collin

Number of selections: Single Choice

Race state: Closed Primary

Race category: County Court at Law Judge

Bio field set: All Races

Questions: County Court at Law Judge

Candidates: [Add candidates later.]

Adding Candidates

If you want to add candidates to a race previously defined, use the **Races & Initiatives** function to edit the race and enter the candidate information in the *Add Additional Candidates* box.

Alternatively, you can use the **Candidates** function to enter the candidate information in the box for the appropriate race.

NOTE: You should enter all the candidates from all parties in a single race for the primary elections, instead of creating a separate race for each party. This will allow the same races to be used in the General Election. During primary elections, you may want to send questions only to candidates who are contested within their party, and not send questions to candidates who are not contested within their party. In that case, you can manually enter a notation as a response to each question for the uncontested candidate, so that the general statement, "Candidate response not available," doesn't appear. For example, "Questions were not sent to this candidate because primary race is not contested." (See how to manually enter responses for candidates below.)

Race Manager is a useful tool to review and edit races already created. The list of races will show the following information for each race: Primary/Open, number of candidates, number of

questions, race category, district and district type, and maximum number of candidate selections. It's a good idea to scan the list and make sure all the information looks correct. You can select any races to be edited, and then use Bulk Edit to enter or change the race attributes as needed.

Invite candidates, send reminders.

Use **Campaign Tracker** to send email invitations and reminders, and to track the status of responses. You will see all the candidates listed in alphabetical order, with symbols in columns to indicate their status: created, invited, or responded. It's helpful to click on the *Race* heading at the top to reorder the candidates by race, and also to click on Page Size *All* at the top of the page so you don't have to go from page to page.

Email addresses and receipt tracking

Campaign Tracker displays an "@" sign just before the Pty (Party) column if a candidate does not have a valid email address (red @), or has an address that has not been verified (gold @). If you click on the candidate's name, the top of the *Add/Manage Candidate screen* says, "See event log for this candidate." You can click on the event log to see what messages have been sent, whether the candidate has read them, when the candidate information was edited, etc. Remember that if you send a copy of the email to yourself and then open it, the event log will say that the email has been read.

Created

A right-arrow appears in the *Created* column if a candidate has been created, but not invited. To invite the candidate, click on the right-arrow. A screen will appear with the invitation message to be sent (make sure the correct email template is shown; you can select one at the top of the screen). You can send a preview to yourself before sending the email to the candidate(s).

Invited

If a candidate has been invited, the *Invited* column will show a left-arrow and a square icon. If you want to send a *Reminder*, click on the square icon. A screen will appear with the reminder message to be sent (make sure the correct email template is shown; you can select one at the top of the screen). You can send a preview to yourself before sending the email to the candidate(s). If you want to un-invite the candidate; click on the left-arrow. You can then send another invitation to the candidate, if needed.

Resp

If a candidate has responded, the *Resp* column will show a left-arrow. This status only shows up if a candidate has submitted his responses as complete. If he has entered some responses, but hasn't said they are finished, the *Invited* status will still show. If you want to change the *Resp* status, click on the left-arrow and the status will be changed to *Invited*.

If you manually enter information for the candidate (see below), you have an option to "Move to Responded" when you save the information. This will change the status to *Resp*.

Bulk Edit

If you want to send invitations or reminders, or change the status, of a group of candidates rather than individual ones, put a check in the **Edit** box of each candidate to be modified, then click on the appropriate symbol (as described above) after the *Bulk Edit* caption at the bottom of the list.

Manually enter candidate responses obtained separately.

If you prefer, you can contact candidates in your traditional way and then enter their responses in VOTE411, instead of asking them to enter their responses directly. Or some candidates may be unable to respond directly in VOTE411 and will send you their responses to copy and paste.

To enter a candidate's responses, select the **Campaign Tracker** function from the menu. Click on the name of the candidate and the *Add/Manage Candidate* screen will appear. For each question, copy the candidate's response into the appropriate response box. Also be sure to enter any information provided by the candidate in the other fields, such as *Campaign Phone, Web Site, Email*. To upload a photo (jpg file no larger than 2 megabytes), enter the filename in the *Picture* field (or browse the files on your computer to select the file) and then click **Upload Picture**. The photo should appear in the profile. When all entries are complete, click the **Save** or **Move to Responded** button at the bottom of the screen. Click the **Save** button if you will need to make additional entries at a future time. You must click **Move to Responded** to change the candidate's status to *Resp* on the Campaign Tracker screen and enable the responses to be seen in the public *Voters Guide* when the race is published.

Preview races and candidates.

Use the **Preview** menu item to preview races before they are published, similar to what a user will see in the public *Voters Guide*. In Preview mode, you will see responses that a candidate has entered, even if they have not been submitted as complete. However, if a race is published, the public will not see any responses that have not been submitted as complete.

Many of the VOTE411 screens also have a **magnifying glass symbol** beside a race or candidate name. If you click on the symbol, you will see a preview of the race or candidate.

Enter ballot propositions.

If you want to enter ballot propositions, with or without pro/con arguments, enter the race in the Add Additional Referenda box in **Races & Initiatives**.

VOTE411 will automatically create the following two "candidates," which you can rename if you like:

- Yes – For the Measure
- No – Against the Measure

You can use the *Description* field and bio fields for ballot language and any background or explanatory information for the ballot proposition. If you want to show pro/con arguments, create a question set with a single question, "Arguments." This will allow you to enter the arguments for the respective "Yes" or "No" candidate.

Example:

- Create a question set with one question, “Arguments.”
- Create a bio field set with one bio field, “Explanation.”
- Create a race named “Proposition 1,” enter the ballot language in the *Description* field, enter background information in the Explanation field, and select the appropriate *District*, *Race Category*, *Bio Field Set* and *Question Set*.
- Enter the respective pro or con arguments as the response to the “Arguments” question for each “candidate.”

If you enter pro/con arguments, contact LWV-TEF to review them before you publish.

Publish races.

When you are ready to “go live” with one or more races, use **Race Publisher** to publish the races as described in the LWVUS manual. Be sure to notify Megan Brown with LWVUS prior to publishing, so that she can order the races correctly.

Only candidate responses with the status *Resp* will be shown in the published *Voters Guide*. Candidates can continue to enter or edit their responses even after the race is published. If you want to edit a race – e.g., change the description or other attributes – you need to “unpublish” the race on this screen, make the change, then publish the race again.

Export Data.

You can export data in various formats to use in traditional *Voters Guides*. A data export is also a good way to back up the data in your VOTE411 account. Select **Data Export** from the menu. The races will be listed, with the number of candidates in each status category: *Created*, *Invited*, *Responded*. It will also show whether the race is currently published. Each race has a checkbox on the left side. To export more than one race, check the boxes to select the races you want, and then select the type of *Output Format* and press **Export**. A file will be generated that you can Open or Save to your computer.

Output Formats:

A number of output format options are available. Review the help text for more information about the formats. Here are some common ones:

- The *HTML, Candidate Profiles* include each race, each candidate in the race, all of the candidates’ profile information including photo (thumbnail), questions and responses. The HTML format can be opened in Word or other word processing or publishing software.
- For better resolution photos, do a separate export of *Images, Candidates*. The output will be a zipped file with a separate JPG file with the candidate’s name for each candidate. If a candidate’s photo does not export, check the candidate’s name to make sure it doesn’t have invalid filename characters, such as apostrophes or commas.

Unpublish races, archive/delete candidates.

After an election, do the following:

- Unpublish all races in **Race Publisher**.
- Archive all losing candidates in **Delete/Archive**.

After a primary election and before a primary runoff election you can:

- Unpublish the primary races.
- Delete or archive the candidates that were eliminated in the primary.
- Archive the candidates that survived the primary but will not appear in a runoff.
- Change the race description to indicate that it is a primary runoff race.
- Publish the primary runoff races.

Then, for the general election:

- Unpublish the runoff races.
- Delete or archive the candidates that lost the runoff.
- Restore the candidates that were archived so they would not appear in the runoff.
- Change the race description to indicate that it is a general election race.
- Publish all of the general election races.

Email Templates

General Instructions

You can use the **Email Templates** function to create a customized template for each type of email you want to send to candidates. The existing templates will be displayed. There are default templates for Invitation, Reminder, Receipt, Bulk Email and Email Ballot. You can create new templates and/or edit the default templates.

Each template includes text and macros. The text will appear as-is in the email, including any formatting. The macros represent information that the system will automatically fill in when the email is generated. Each macro starts with # and ends with (). The most common ones are listed below:

- #candidate_name() – the name of the candidate to whom the email is sent
- #question_list() – the list of questions asked of the candidate
- #response_link() – a unique link for the candidate to click on to access VOTE411 and enter his responses to the questions
- #question_responses() – the answer responses submitted by the candidate
- #bio_responses() – the biographical field responses submitted by the candidate

These are the types of email that generally are sent to candidates:

Invitation

This is the email to invite the candidate to participate in the *Voters Guide*. The invitation should include your League name and contact information and macros for candidate name, questions and response link. When the email is sent to each candidate, the system will fill in the appropriate information for each macro. You should also include your response deadline and any instructions for completing the responses. You can create multiple Invitation templates as needed, and select the appropriate one when you send the invitations using Campaign Tracker.

Reminder

This is an email that can be sent to candidates who have not responded shortly before the deadline. It usually has the same information as the *Invitation*. You can create multiple Reminder templates as needed, and select the appropriate one when you send the reminders using Campaign Tracker.

Receipt

When a candidate completes his responses, this email is sent to acknowledge receipt. It should include macros for the candidate's responses to questions and biographical fields. Only one Receipt template is allowed, since it is sent automatically, but the default template can be edited.

Bulk Email

Bulk Email templates are used when you send other types of emails to candidates using Email Blast. For example, you can send invitations to candidate forums or other events. You can also create an email to send to candidates when races are published, and tell the candidates how to access the published races in VOTE411.

Email Ballot

This email format is used when a user requests a copy of his or her ballot selections. It should include a link to the ballot and the ballot contents. Only one Email Ballot template is allowed, since it is sent automatically, but the default template can be edited.

Header Fields

When you create or edit a template, be sure to complete the fields at the top and then enter or copy-and-paste the text you want in the box. The boxes at the top let you specify the following information:

Template Name: This is the name of the template so you can select it when you send an email.

Subject: This is the subject line that will appear in the email, e.g., Invitation to Participate in LWV Voters Guide.

Sender Name: This is the name of the sender that will appear in the email, e.g., your League name.

Reply-To: If the candidate replies to the email, the reply will go to this email address.

BCC: You can send a blind carbon copy of the email to yourself. However, if you open the email, the candidate's event log will show that the email has been read, the same as if the candidate had opened it. Generally it is a good idea to send a BCC on Receipts, so that you will know when a candidate responds, but not on other emails where you want to track whether or not the candidate has opened it.

Sample Invitation Template

Header Fields:

Name: Primary 2018

Subject: LWV Voters Guide – Invitation to Participate

Sender Name: [*your League name*]

Reply-To: [*email address of someone to receive replies to this email*]

BCC:

Dear #candidate_name(),

The League of Women Voters of [*your League name*] invites you to enter your responses at the link below by [*deadline for responses*] for our Voters Guides.

About Voters Guides: Voters rely on our guides for unbiased information about candidates' qualifications and positions. LWV never supports or opposes any candidate or political party. We pose questions in VOTE411, and you can post your replies in your own words. Your responses and contact information will be available to voters throughout the world 24/7 through an interactive, community specific online Voters Guide at www.VOTE411.org and may be distributed through other League sanctioned print or online Voters Guides.

About responses: Education and Experience fields have a limit of [*substitute your own character limits*] characters each. Response fields have a limit of [*substitute your own character limits*] characters each, including spaces. Please provide direct, relevant responses to the questions asked. Responses that contain references to opponents will be deleted, and "Response does not meet criteria" will be printed instead. These fields are also available: [*substitute your own biographical fields*]. Please upload a photo of yourself (preferably a head shot JPG file less than 2 MB). Generally it is helpful to compose your answers beforehand and then copy-paste them into the form. If you are unable to post your responses directly, then you may email your responses and photo to me, and I will copy-paste them for you.

Please respond to the following questions:

#question_list()

To enter your responses, click on this link:

#response_link()

If you have any questions, feel free to email or call me.

Thank you,

[*name, title, League, and contact information*]

Sample Reminder Template

Template Name: Primary 2018

Subject: LWV Voters Guide – Reminder to Participate

Sender Name: [*your League name*]

Reply-To: [*email address of someone to receive replies to this email*]

BCC:

Dear #candidate_name(),

The League of Women Voters of [*your League name*] reminds you to enter your responses at the link below by [*deadline for responses*] for our Voters Guides.

[Remainder of email is same as Invitation]

Sample Receipt Template

(Automatically sent to each candidate when responses are submitted)

Header Fields:

Template Name: Receipt

Subject: LWV Voters Guide – Response Receipt

Sender Name: [*your League name*]

Reply-To: [*email address of someone to receive replies to this email*]

BCC: [*email address of someone to receive blind carbon copies of this email*]

Dear #candidate_name(),

Thank you for your participation in the [*your League name*] Voters Guide. Here is a copy of your submission:

#bio_responses()

#question_responses()

The League of Women Voters of [*your League name*] reserves the right to review all responses for conformance to our guidelines. We will contact you if changes need to be made. If you have any questions, please contact me.

Thank you,

[name, title, League, and contact information]

Sample Bulk Email (Publish) Template

Header Fields:

Template Name: Publish

Subject: LWV Voters Guide now available

Sender Name: [*your League name*]

Reply-To: [*email address of someone to receive replies to this email*]

BCC:

Dear #candidate_name(),

Thank you for being part of the League of Women Voters of [*your League name*] Voters Guide. Our site is now live and you may see your responses by visiting www.VOTE411.org.

If you haven't responded, then you may still do so, and your responses will be available on VOTE411 soon afterward. You may use the link in your original email invitation, or let me know if you need a new email.

Thank you,

[*name, title, League, and contact information*]