Election Checklist

This checklist is designed to help new customers prepare for their first online voting event with Simply Voting. The checklist covers the most common considerations, but you may have unique requirements which should be discussed with our staff. If at any time you feel overwhelmed or have any questions, contact us via our website Support Form or give us a call at 1 (800) 585-9694 during business hours (9am to 5pm Eastern).

Getting Started

☐ Get a Quote
Some features and services are premium and cost extra, so if you are not sure please ask us for a quote.

☐ Create an Account
If you haven't done so already, visit www.simplyvoting.com and click SIGN UP to reserve your voting website. Then click LOGIN and fill out your Account Details information.

☐ Branding
You can add your logo and colours to your voting website to brand it. We also offer custom branding if you would like to mimic the look and feel of your existing website.

General Information

☐ Self-Administered or Fully Managed?
If you prefer to manage your election yourself with our easy-to-use Election Manager, click LOGIN and then download our Election Manager Guide from the Help page. Don't forget our support team is standing by to answer all of your questions. However, if you prefer to have a Simply Voting professional manage pre-election setup as well as active and post-election management, we offer a Fully Managed Election service.

☐ Election Dates and Description
Exactly when should voting begin and end? What is the name of the election (e.g. 2020 Board Election) and is there any introductory text you would like to appear on the ballot?

☐ Paper Ballots
A hybrid election is sometimes necessary due to regulations or to accommodate voters without email or internet access. Will you allow voters to submit paper ballots? Will they be submitted by mail or in person? If by mail, would you like Simply Voting professionals to count them? If you will manage paper ballots, we generally recommend waiting until after online voting has ended, so that you can check the voter against a final list of who already voted online. We can help you find a workable solution that ensures one-vote-per-person.

☐ Telephone Voting
Telephone voting may be offered on top of online voting to accommodate voters without internet access, but who can still receive their require voting credentials (e.g. via mail, email, or some other method). We have a professional voice artist record prompts and then connect a toll-free phone number to your account.

☐ Live Event Voting
Will voting occur at a live event, such as an annual meeting? Will you require internet voting kiosks, on-site distribution of voting passwords, or on-site support? How many rounds of voting could there be? Are there any nominations or motions "from the floor"? Does all voting occur at the live event or is there an online voting period preceding the live event? How will any online pre-event voting be coordinated with live event voting to ensure one-vote-per-voter and to unify the tally?

Voter Authentication

☐ Remote Authentication

The ultimate solution for voter authentication is to integrate your voting website with your organization's existing authentication mechanism. This allows voters to use passwords that they already know. Do you have a members-only portal, organization-wide email accounts, or some other system in place? We would be happy to explore the possible integration technologies with you.

☐ Organization Supplied Passwords

If remote authentication isn't possible, could you provide one or two pieces of information to use as authentication credentials such as membership number and date of birth? As long as the credential(s) can't be guessed this would be advantageous as your voters would already know their passwords.

☐ Simply Voting Generated Passwords

Most customers have us generate passwords for each voter. But these passwords must be communicated to the voter. If you have email addresses for your voters, we can send passwords via email. If you have mailing addresses, we can send them by the post mail. If we cannot reach some voters, will they vote on paper?

Ballot Questions

☐ Question Descriptions

What is the name of each voting question (e.g. Vice President, or Adoption of By Law, or Ratification of Agreement) and is there any introductory text you would like to appear on the ballot?

☐ Question Options

For each question, what are the options voters may select from (e.g. Yes/No or candidate names)? You may provide statements and/or photos for each option. Will you allow write-ins?

☐ Question Rules

For each question, are voters allowed to abstain from selecting an option? How many options or candidates are voters allowed to select? Is the question to be voted on by all voters or just a segment of voters? Do you want voting options to be ranked in order of preference? If so, how should the votes be tabulated (e.g. Single Transferable Vote, Borda Count)? Do you want to collect comments from voters?

Electors

☐ Prepare Data File

You will have to provide a list of eligible voters before the start of voting. You will need a .CSV file containing something unique to use as the Elector ID, and optionally, the full name, email address, password and mailing address. Further fields may be required if you are targeting questions to segments of electors or if you need to assign vote weights to each elector. We can provide assistance with the preparation of your data.

☐ Email Blasts

Would you like to send mass emails to your electorate at the start of voting? What text should the message contain? Would you like to send reminders to electors that haven't voted? When should reminders be sent and what text should those messages contain?

Payment

☐ Payment Method

If you do not require premium services or features, you may pay by credit card directly in the Election Manager. Otherwise we can prepare an invoice and arrange for payment by cheque, wire transfer, or credit card.