

Elections integrity best practices

Responsibly supporting elections on online platforms

Elections Integrity Series Part 1
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About the Integrity Institute

- ▷ The Integrity Institute is a non-profit working to advance the theory and practice of protecting the social internet, powered by our community of integrity professionals.
- ▷ Our community supports the public, policy makers, academics, journalists, and social media companies themselves as they try to understand best practices and solutions to the problems posed by social media and other social platforms.
- ▷ We believe in a social internet that helps societies, democracies, and individuals thrive.
- ▷ We build towards this vision through 3 pillars:
 - ▷ Creating a community of integrity professionals.
 - ▷ Disseminating and enriching the shared knowledge inside that community.
 - ▷ Developing the tools and research of an open-source integrity team.
- ▷ This guidance is for people looking to learn more about supporting healthy elections within online platforms, particularly those in newer or smaller online platforms; and to anyone seeking to learn how companies have and can approach this space.

About this guidance

- ▷ This guidance covers:
 - ▷ What an elections program is, why you need one, and how to get started
 - ▷ An overview of existing companies' elections programs
 - ▷ Deeper dives into selected critical topics, plus an appendix sharing a wealth of additional resources
- ▷ What's not included:
 - ▷ Anything we've gone deeper into in other resources (eg [metrics and design transparency](#), [ranking and design transparency](#), [social media and the spread of harmful content](#))
 - ▷ Deeper explorations of metrics, goal-setting, and leveraging technological and other tools will be found in our forthcoming presentation, "Elections Integrity Best Practices: Defining and Achieving Success."

Key takeaways

- ▷ Elections around the world are continuous. We expect [65 elections across 54 countries](#) in 2024.
- ▷ Platforms can't abstain from societal events - people talk about what's important to them, which includes politics.
- ▷ Political issues present risk to technology platforms, including regulatory compliance, legal liability, and reputational damage. User activity on public platforms presents serious risks to society and electoral processes.
- ▷ But elections work also offers opportunity, such as helping catalyzing social movements and positive sentiment from key stakeholders.
- ▷ To be impactful, elections programs need to be fully cross-functional (product, policy, legal, comms, operations), with support from leadership. Elections should be part of strategic planning, and each organization will need to analyze their structure and define the approach that's best for them.
- ▷ Companies don't have to go it alone - partners across the industry, academia and civil society offer myriad resources to support your work.

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1. Why you need an elections program

Elections matter, and online platforms find themselves in the the mix whether they want to be or not.

Elections integrity is a critical and distinct area

- ▷ Elections happen around the world nearly every month of the year. [Over 5 billion people use the internet](#), and 2024 will see 65 elections across 54 countries.
- ▷ Platforms have often done work to fight disinformation and violence, but elections are distinctive in several ways:
 - ▷ Elections lead to periodic surges in political attention and civic activity.
 - Both the quantity and the nature of political activity changes through the election cycle, requiring specific planning and actions throughout the election season.
 - ▷ Elections have uniquely strong real-world impact.
 - Political struggles connect to underlying social divisions, which can increase harmful rhetoric.
 - Perceptions of harm and policy limits around actionable content can diverge greatly.
 - Elections directly create winners and losers, making fairness concerns fundamental.
- ▷ In short: elections test and stress your civic integrity protections. Elections integrity means taking positive action to safeguard and promote elections, including public and voter confidence in electoral processes and outcomes.

Elections bring risk of harms to online platforms

- ▷ Compliance:
 - ▷ Your platform may be subject to [election regulations and compliance requirements](#).
 - ▷ While regulations vary by country (and other jurisdictions), you may face regulations around political ads, in-kind donations, privacy, transparency, moderation (including 'must carry' models), and government takedown requests.
- ▷ Legal liability:
 - ▷ Non-governmental actors (eg candidates, political parties) may seek legal remedies from platforms for users' on-platform actions.
- ▷ Reputational risk:
 - ▷ In addition to specific users having negative experiences, emerging narratives can have material business impacts, including -
 - angering users (including prominent voices/creators)
 - spurring increased regulatory action

Platforms bring risks to people around elections

- ▷ Direct on-platform harm:
 - ▷ Harassment and brigading
 - ▷ Account compromise
- ▷ Off-platform ('real world') harm:
 - ▷ Threats of election-related and political violence
 - Incitement of violence and hate speech increases during elections and can evolve quickly.
 - Spontaneous or coordinated violence designed can arise before, during, and after voting.
 - Violence can target voters, poll workers, election officials, candidates, party members, and social groups.
 - Doxxing and threatening poll workers and elections officials has been a trend in recent elections globally.
 - ▷ Harm to societal trust and cohesion
 - Online platforms are widely alleged to contribute to harms such as affective polarization and erosion of trust in societal institutions that support democracy (eg journalism, election management bodies), which can increase the risks of future political violence.

Election outcomes can be unfairly affected

Undesired content circulating on social media can directly affect outcomes.

- ▷ **Voter suppression and disenfranchisement:**
 - ▷ Timeframes are extremely short: direct voter interference generally happens while polls are open or just before.
 - ▷ Ground truth can be difficult or impossible to verify fast enough for effective enforcement.
 - ▷ Eg: False information about mechanics of voting (eg "you must use a blue pen"), poll closures or safety issues (which can be hyperlocal).
- ▷ **Political misinformation:**
 - ▷ Politicians and their allies may lie. There's no shortage of falsifiable claims in most elections.
 - ▷ It's especially damaging late in cycles when there's no time for candidates or authorities to respond.
 - ▷ Eg: in the US we speak of an 'October surprise' such as the Hillary Clinton email scandal.
- ▷ **Disinformation and info ops campaigns:**
 - ▷ Organized adversarial campaigns, whether domestic or foreign, use inauthentic actors and techniques to deceitfully change the narrative.

But elections can also bring opportunity

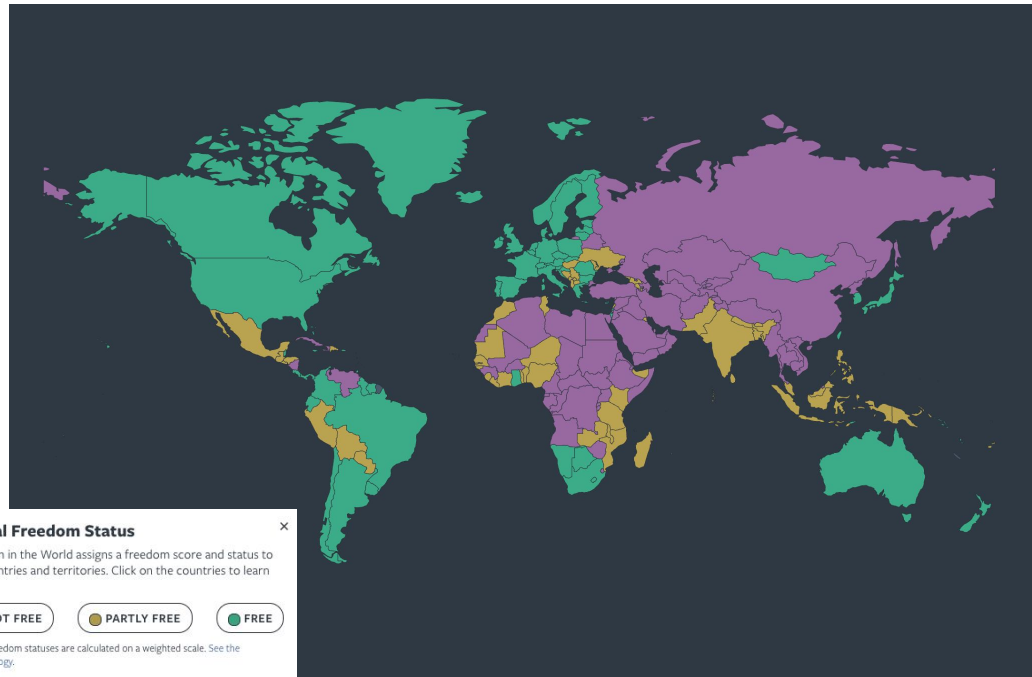
- ▷ Social media can play a positive role in our society and democracies.
 - ▷ It provides meaningful channels between governments, political leaders and constituents.
 - ▷ It helps to share and amplify credible voting information.
 - ▷ It can increase participation (expression, fundraising, registration, voting).
 - ▷ It can catalyze social movements and change.
- ▷ If your platform has users in a country where an election's happening, it *will* play a role in the election.
 - ▷ Social media discussion has real contributions to both direct outcomes (winners and losers) and the health of the civic fabric.
 - ▷ Platforms can't abstain from elections - people talk about what's important to them, which includes politics.
 - ▷ Prominent actors (eg candidates) will want to have accounts, post, respond to organic discussion, and run ads.
 - Elections bleed into surprising places, eg entertainment (TikTok) or commerce (campaign merch sales) platforms.
 - ▷ Trying to avoid elections (banning political ads, suppressing political discourse, etc) brings its own issues.
 - Banning such activity on your platform really just pushes it somewhere else online. If you do that, it's worth asking whether it'll go someplace that takes these issues seriously or somewhere that doesn't.
 - Avoiding politics requires defining politics, which is itself a political act. Wherever you draw the line will benefit some perspectives over others, often privileging incumbents and reinforcing existing power relationships.
 - Executing on that definition of politics - policy plus operationalizing and enforcing on the boundaries - is exceedingly difficult.
- ▷ Leadership alignment around elections can be a forcing function to prioritize integrity work and a way to meaningfully and publicly adopt a pro-democracy perspective.

But remember: not all elections are created equal

While this guide focuses on supporting free and partly free elections, countries actually fall across a wide spectrum between free and not free. Elections best practices in less free elections will be discussed more in our forthcoming materials.

Many platforms utilize Freedom House's [global freedom status score](#) as a starting point in understanding which countries go to the polls and the risks they face. Also consider relevant regulations and other voices to form a full picture and guide your decisions.

[See resources](#) to understand the elections landscape in a specific country.



For example: US elections are far from typical

The US is the exception to how most elections are run, which should impact your approach. Here are some of the key differences:

United States	Rest of world
<ul style="list-style-type: none">• Decentralized election administration:<ul style="list-style-type: none">◦ The FEC only regulates federal level candidates and doesn't manage the administration of elections (ie voter registration, polling places and counting ballots).◦ Each state has their own campaign finance laws, rules for candidates, rules on voter registration and on how ballots are counted that are run by state and local election officials. These rules can vary by state and even county or municipality.◦ Other government agencies play a role (EAC, CISA).• Political speech is amongst the most protected. The FCC requires broadcasters to run candidate ads, despite what they might say. Cable stations, newspapers and online outlets are not beholden to those rules.• There's a large variety of political actors. In addition to candidates and political parties, the US has numerous groups who influence voters such as super PACs and independent expenditure groups.	<ul style="list-style-type: none">• Most countries have a single election commission in charge of rules for candidates and political parties, and administering elections. Not all election commissions are considered independent by international observers. <i>It's important to do due diligence before working with any commission.</i>• Election periods are shorter. The US feels like it is nearly always in an election cycle. Most countries have a set period of time for campaigning that can be as little as a few weeks.• Some countries are parliamentary systems which means they can call snap elections or will set election days, and this is hard to plan for. Most have a requirement that after so many years an election must take place (see upcoming elections).• Many countries have more restrictive rules on political ads. For instance, some countries don't allow campaigning a few days before the election, and have strict caps on advertising and other campaign expenditures.

2. How to initiate an elections program

Identifying, prioritizing, and resourcing efforts to address election-related activity on your platform.

Understand what this means for your platform

- ▷ Map out the ways your platform could be used for politics:
 - ▷ User generated content from governments, political parties and candidates, journalists, and 3rd parties.
 - Eg outreach, supporter engagement, fundraising, 'get out the vote' efforts, email list building, organizing
 - ▷ Surfacing authoritative information on the voting process.
 - ▷ Advertising, including paid boosting of political content and issue topics.
 - ▷ Sale or display of politically-themed merchandise.
- ▷ Consider consulting external organizations on the ground who can give context on how your platform is being used by candidates, political parties and other entities.
- ▷ Map out the countries your platform is available in:
 - ▷ [Determine when those countries are going to election](#) and [prioritize accordingly](#).
- ▷ Determine opportunities/needs:
 - ▷ Lay out policy gaps around voter misinformation, violence, harassment, political ads.
 - ▷ Explore how you might show people authoritative information.
 - ▷ Understand operational capabilities and language capacities to find and action potentially violating content.
 - ▷ Explore partnerships with factcheckers, officials, orgs providing technical support (IFES, NDI, IRI, Carter Center, IDEA, UNDP).
 - ▷ Plan for country-specific risks (eg regulations, understanding specific axes of cultural conflict).
 - ▷ Define how to handle political figures on your platform (eg whether to allow political ads, whether you're providing them adequate protections).
 - ▷ Choose how to engage with prominent users who violate your policies.

Be realistic about what's possible

- ▷ Set high-level goals for your top areas of concern:
 - ▷ Alignment on prioritization and goals is essential.
- ▷ Your goals may require policy changes:
 - ▷ Some policies may require simple clarifications or extensions, eg explicitly adding electoral candidates to definitions of prominent users eligible for heightened account protections.
 - ▷ Other areas may set new expectations for your platform users, which you will need to concretely define and explain before implementing enforcement measures.
- ▷ Setting metrics may be premature - that's OK at this stage:
 - ▷ The dynamic nature of elections stymies metrics best practices you may use in other integrity work.
 - ▷ Periodic measures (eg month-on-month improvements) will have little value, and meaningful baselines (eg year-on-year, comparing countries or platform) generally don't exist.
 - ▷ Discussions evolve in character and move quickly, making prevalence/frequency measures hard to maintain and calibrate across time (eg "N95 facemask" wasn't a political keyword until it was).
 - ▷ Raw intervention counts remain problematic metrics, conflating actions with outcomes.

Implement election protections in product

- ▷ Platforms often begin elections integrity efforts with an audit, to assess how ready they are to handle the period of heightened scrutiny.
 - ▷ This might look at things like ad targeting transparency, purchase restrictions, misinformation protections and account security (eg whether civic actors are using existing safety features).
- ▷ Existing protections are then augmented to handle the election context's elevated risks and challenges.
 - ▷ Changing risks justify different tradeoffs, including temporary or 'break glass' measures.
 - ▷ Existing enforcement may be actioned at different thresholds (eg content reviewed after fewer user reports, different risk scoring).
 - ▷ New enforcement may address election risks (eg ad bans, voter suppression removal).
 - ▷ Product changes may provide additional information:
 - Transparency reports
 - Linking to reliable election information

Define the right size team for your company

Different sized companies have different levels of resources they can allocate to elections work. What's important is that someone in your organization is thinking about this as part of their job and is accountable for doing the work.

- ▷ For startups and small companies:
 - ▷ Designate someone on your team to think about elections, even if it's not their full time job.
 - ▷ That person can start to develop platform values to serve as guideposts during elections periods. If you're able, developing a policy to address elections-related content would be the next step.
- ▷ For medium-sized companies:
 - ▷ Assess when you need to outsource and use external organizations to fill your capacity gaps.
 - ▷ Develop a policy for addressing elections-related content to serve as unifying document to anchor conversations within the company.
 - ▷ Shift capacities around election cycles (eg borrow a product team and put them on a critical election for a set period).
 - ▷ During or after these cycles, build in time to identify long-term capacity needs for elections work.
- ▷ For large companies:
 - ▷ If your presence in a country is large enough that your platform could impact an election, then it is large enough to justify paying people to work on these issues.

Navigate the civil society landscape

You don't have to go it alone. Civil society (NGOs, institutions, and other groups) offer a myriad of resources and potential partnerships.

[This compendium](#) will help you navigate things like:

- ▷ Connecting with election officials.
- ▷ Factchecking.
- ▷ Getting information about election dates, registration, deadlines.
- ▷ Ramping up on relevant issues, via:
 - ▷ orgs with experience on local human rights concerns
 - ▷ orgs with experience on any historical local elections issues
 - ▷ orgs with expertise on media and news landscape and interactions with online spaces
- ▷ Connecting with counterparts at other companies.

We recommend networking strategically. Start large (eg regional organizations, international civil society networks, top think tanks in a country) and network down to the local level to understand specifics.

Engaging successfully with civil society

- ▷ Develop relationships ahead of your anticipated needs - ideally at least a year before elections.
 - ▷ Building trust and rapport takes time, and local organizations will be very busy around elections.
 - ▷ Understand their priorities, resource constraints, and incentives, and engage with an open mind.
 - ▷ Expect variance in goals, knowledge, perceptions, perspectives, work style, even terminology. Eg relative to an NGO fighting voter suppression, a platform's definition of voter interference might be much narrower.
- ▷ Understand that NGOs have limited resources, response time may vary.
 - ▷ Most orgs aren't structured to work at scale. Interactions with platforms can easily become a drain on resources.
 - ▷ Streamline engagement by establishing bi-directional communication and escalation processes.
 - ▷ Work with counterparts at other platforms to further streamline so that NGOs don't have to duplicate work.
- ▷ Ensure the relationship helps sustain the NGO.
 - ▷ Make it mutually beneficial for both parties.
 - ▷ Understand that compensation may take different forms.
 - For some orgs, getting clear metrics from a company about certain policy decisions, or visibility into the impact of the org's work, may be far more valuable to their sustainability than a short-term grant or honorarium.
 - ▷ It's in your interest to invest in the long term sustainability of partner orgs – they'll be needed in the next cycle.

3. Overview of elections programs

Policy choices, product design considerations, and operational practices to support healthy elections.

A brief history

- ▷ Politics has been in the media since forever, but the internet and social media have provided new contexts with new risks and opportunities to be managed ([see history](#)).
- ▷ Since 1996, platforms have engaged in elections - for example helping people register to vote, reminding them about election day, co-sponsoring debates and highlighting trends of what people are talking about.
- ▷ 2016 was a watershed moment. Pivotal elections in the Philippines, UK (Brexit), and the US, and the [Rohingya genocide](#) in Myanmar, brought more focus on new risks and opportunities.
 - ▷ Challenges coming from 2016 elections:
 - misinformation from financially motivated actors ([Macedonian Troll Farms](#))
 - political ads transparency
 - foreign influence, eg Russia's Internet Research Agency
 - Cambridge Analytica
 - ▷ Early platform actions:
 - factchecking programs
 - adversarial engagement to identify and deplatform information operations
 - construction of civic metrics
 - launching front-end, user-facing civic and trust/safety products
 - development of civic policies
- ▷ 2019 brought debates around factchecking politicians, considerations of newsworthiness, microtargeting of political ads, and dealing with toxic content from public figures.
- ▷ 2020 brought more challenges on moderating speech from politicians, increased efforts to show people authoritative information, and highlighted the risks when online political organization becomes violent - as with Stop The Steal groups and January 6.

Overview of platform approaches today

- ▷ Authoritative information on elections:
 - ▷ In relatively free and partly-free countries, platforms often support distribution of authoritative information - although budgets, program structures, and product solutions vary widely.
- ▷ Political ads:
 - ▷ There's wide consensus for transparency measures from platforms and regulators.
 - ▷ Views on advertising restrictions are divergent.
- ▷ Misinformation, disinformation (including foreign information operations), and malinformation:
 - ▷ Foreign interference is widely condemned, although identification and enforcement can be challenging.
 - ▷ Domestic disinformation policies vary across platforms.
 - ▷ Voter disenfranchisement (misinformation about the mechanics of voting) is widely banned.
 - ▷ Misinformation/[malinformation](#) (as distinct from disinformation and info ops) approaches also vary across platforms:
 - Third-party fact checking, community input, content- and account-level enforcement differs.
 - Platforms have distinct approaches on how to handle misinfo from prominent politicians.
- ▷ Regulatory, compliance and legal:
 - ▷ This is generally one-off and region/country/state-specific. The field is rapidly evolving (eg ['must carry' legislation](#)).
- ▷ Other elections topics:
 - ▷ Supporting online political organizing, within some guardrails (eg advocating or organizing violence).
 - ▷ Protecting civic actors and voices from harassment, impersonation, account takeover, and other threats.

Common product approaches (part 1)

- ▷ Authoritative information on elections:
 - ▷ In-product 'election centers' that link to or directly provide authoritative information.
 - ▷ Campaigns to promote authoritative information sources.
 - ▷ UX or content placed in-feed, or in otherwise prominent parts of the core user experience.
- ▷ Political ads:
 - ▷ Heightened ad transparency ([see Meta example](#)).
 - ▷ Reduction in targeting options ([see Google example](#)).
 - ▷ Permanent or temporary bans on political ads:
 - Sometimes platforms require advertisers to pre-register, to give time for reviews.
 - Note that bans dramatically affect get-out-the-vote efforts (ie good actors), and can handcuff outside organizations' ability to fight late-cycle misinfo.
 - ▷ Demonetization of political content.
 - ▷ Additional ad purchasing restrictions, eg banning political ad buys from outside the country to combat foreign interference.
 - ▷ Caution for all such measures: effective and and fair definition of 'political' is a major challenge.

Common product approaches (part 2)

- ▷ Misinformation, Disinformation, and Malinformation:
 - ▷ Political Misinformation:
 - Adding or reallocating resources to help manage surges of political misinfo.
 - Identifying and adding resources with appropriate country context and language coverage.
 - ▷ Voter suppression:
 - Achieving useful turnaround times for voter suppression requires bespoke detection, decisioning, and actioning processes, not just more review resources.
 - ▷ Disinformation campaigns and information operations:
 - It is hard to spin up a brand new anti-information-operations practice just for the election period, but platforms that already have such practices may shift resources from anti-spam or protections in other countries to maximize detection and enforcement against election-related disinfo.
 - Operations can originate inside or outside the country; the latter are most universally condemned.
 - Caution: have policy clarity and clear decision-making processes in place; the lines between "grassroots" and "astroturf" and "information operation" can be messy, and WILL be obfuscated for political cover.
 - ▷ Establish a clear and consistency policy for dealing with the inevitable flood of "malinformation" - low quality, likely harmful but not provably false or otherwise cleanly actionable/removable.

Common product approaches (part 3)

- ▷ Reducing visibility of political content:
 - ▷ Again, it's very challenging to effectively and fairly define 'political'.
- ▷ Reducing overall platform virality during critical periods:
 - ▷ Reductions can be back-end (eg algorithmic) or front-end (eg "are you sure you want to share this?" UX).
 - ▷ Note that this will impact platform activity and growth metrics.
- ▷ Content reporting channels for trusted 3rd parties:
 - ▷ This tends to open platforms to fairness questions, so proceed with careful vetting and consistent process.

Learnings so far

- ▷ Speed of human review, especially through 3rd parties (eg fact checkers/journalists), is a challenge.
 - ▷ Social media posts often get most of their distribution before reviews can be completed.
- ▷ Changing user behavior through UX cues is hard.
 - ▷ Users develop blindness to familiar UX, reducing the efficacy of interventions such as badging or other visual cues (authenticated accounts, country of origin, potential misinformation etc).
 - ▷ Motivations for user behaviors may be unexpected, which can defeat attempts to influence users away from undesired behavior, eg resharing content out of habit, or to signal group membership.
- ▷ Engagement with added election content (eg links to authoritative election information) comes at the expense of engagement with platform content (from users and advertisers).
- ▷ Election-specific changes (whether policy or product) will need to be either rolled back or made permanent/recurring after the election cycle.
 - ▷ This requires a decision on when the election is actually complete, which is its own challenge.
 - ▷ It's good practice to schedule a post-election resolution and reflections session.
- ▷ This list of [existing platform policy writeups](#) may provide more context and lessons.

Operational practices and lessons

- ▷ Elections are fast-moving, highly visible, legally sensitive and geographically concentrated, and will expose existing operational weaknesses.
- ▷ Communicate transparently:
 - ▷ Ensure that processes include consistently communicating clearly and quickly across the election team and between decision-makers (executive teams, policy/product leads) and executors (enforcement teams, 3rd party contractors who may need to be trained on new guidance).
 - ▷ Assume that any communications could be made public in the future - be careful what you put in writing.
- ▷ Develop a rapid decision-making escalations and decision-making process:
 - ▷ You should be able to make enforcement decisions on new content from presidential candidates in 1 hour.
 - ▷ Processes should be consistent, repeatable and auditable, and produce well-documented decisions and outcomes.
 - Include clear paths into central/shared decision making from many starting points (eg PR or exec escalations, other internal staff, automated detection pipelines and external actors).
 - ▷ Be able to flex or supplement total operational throughput for peak periods.
 - Eg cross-train or repurpose operational capacity from other countries or integrity concerns, or bring in 3rd party contractors to support.
 - ▷ Handle the unexpected:
 - Red-team and prepare for as many scenarios as possible in advance, before they might hit. Eg political scandals of questionable veracity just before voting, disputes over outcomes.
 - Establish and protect some capacity to watch the field, and surface unexpected emergent issues. Eg social listening tools across other platforms to understand risks manifesting on the ground.

Interacting with different parties

- ▷ Elections bring platforms into relationships with external parties that can offer critical aid, but must be managed carefully.
- ▷ Election authorities are critical sources of authoritative information, but in some countries they can't be trusted as objective arbiters.
- ▷ Governments make formal requests for legally required actions, and give informal suggestions. Make sure to route them distinctly.
- ▷ Ask NGOs to provide electoral and civic context. Engage, authenticate and vet consistently to avoid bias.
- ▷ Political campaigns and candidates:
 - ▷ Plan to handle requests, objections and reporting of content, and provide appropriate notifications of enforcement.
 - ▷ Offer platform assistance, including effective advertising advice, and how to use the platform.
 - ▷ Understand legal constraints around in-kind donations.
 - ▷ Establish rules for employee volunteering and political activity.
 - ▷ Create firewalls for ad teams between campaigns and independent expenditures.
- ▷ Establish a formal process between external parties and your platform's decisions/actions, plus a clear escalation path and audit trail between teams. It can be both a legal and PR lifesaver.
 - ▷ If interactions are off the books, you'll lack governance, consistency and legal protections.
 - ▷ All parties have agendas that inform their interactions with you; always consider that a report or takedown request could have or be seen as political interference.

4. Critical topics

Important topics for starting your elections integrity practice.

Building an operations playbook

Once you've gone through the exercise of understanding the broader risks to your platform and what kind of remediations you think are appropriate, it's important to document the processes and structures you'll require for actual enforcement (typically led by an ops or enforcement ops team).

There's no one-size-fits-all playbook, however there is a general set of steps to take and questions to ask to ensure that your ops teams are informed and given the tools they need to be good partners.

Operations playbook: Prep work

- ▷ Understand the risks that can arise to your operational process during an election.
- ▷ Use [country prioritization](#) to unpack how those risks look at an operational level (eg market size can determine the priority level, and language support needs).
- ▷ Consider language support, staffing coverage, capable ops/enforcement tooling (eg tooling capacity, lag time).
 - ▷ Break out behind-the-curtain needs (eg detection, enforcement, country risk analysis) from and in-front-of-the-curtain needs (eg what copy is used for an interstitial, or a new policy needs to be translated and published).
 - ▷ This is a great time to start building relationships with [civil society](#) and other external experts who can help you understand the local context.

Operations playbook: Enforcement

- ▷ Develop a repeatable, transparent process that stakeholders can commit to.
 - ▷ If it's too laborious, you run the risk of it being thrown out in a crisis.
 - ▷ Plan for 'break glass' measures in extreme situations.
 - ▷ Use SOP (standard operating procedure) to document the process.
 - ▷ Build in time for feedback across teams or individuals who'll be potentially impacted.
- ▷ Document everything, but especially decisions.
 - ▷ This helps during post-mortems, and you'll get better faster. Plus it's cover from liability if something goes wrong.
 - ▷ Documentation may cover what decision was made, by who, and what were the considerations were for that decision.
 - ▷ Use templated frameworks like DACI or RACI, to allow for collaborative context sharing and decision making async.
 - ▷ War rooms (co-located or a remote) are another option useful for speed. But don't forget to document.
 - ▷ Jira, Asana and Slack can avoid unwieldiness - just make sure teams are aligned on which platform to use.
- ▷ Identify a predetermined decision maker (clearly communicated in your org chart) for some scenarios.
 - ▷ Collaborative decision making generally works best, as it allows multiple stakeholders to weigh in and add context.
- ▷ Consider a prioritization framework for decisions or escalations that occur during an election.
 - ▷ You may want to assess against things like risk to the platform, external stakeholder concerns, direct impact on the integrity of an election, and risk of physical violence.

Operations playbook: Transparency and comms

- ▷ Contextualize your org chart by including the problem/policy/process areas teams will be focused on.
 - ▷ This could be your existing org chart, or an elections-focused team.
 - ▷ Note things like location, time zone, language skills, direct phone numbers for key decision makers, and other information for those who are working outside typical business hours and need to navigate more independently.
- ▷ Create a TL;DR of the communication your team can expect during any process.
 - ▷ This is a good addition to the SOP.
 - ▷ Include specific comms and who's on point (eg for additional documentation, alerting other teams of a decision, what cadence are email updates going out).
- ▷ Accessible playbook. Make sure everything here is easy to find.

Red teams: the basics

- ▷ Red team exercises are powerful tools for all teams looking to make pressure-tested decisions. They're a great way to develop and maintain robust products and plans, foster collaboration, and identify and prevent worst-case scenarios.
- ▷ In integrity, red teams often comprise members of the relevant product team and some outside of that team (eg 40%). This can bring fresh eyes and new expertise, unlocking a broader and more comprehensive perspective.
- ▷ Best practices:
 - ▷ Senior leadership buy-in is essential.
 - ▷ Be willing to hear bad news and act on it.
 - ▷ Recognize and mitigate individual cognitive biases.
 - ▷ Read outside interests and expertise.
 - ▷ Plan exercises with specific goals in mind (see [example questions to ask when planning a red team exercise](#)).

Red teams: examples of what they can address

Platform posture and actions:

- ▷ Readiness related to reporting, detection, Integrity interstitials, and agent flows.
- ▷ Potential new label ideas, including labels that increase curiosity on certain content and lead to more exposure.
- ▷ How to handle unclear terms of service changes if a platform decides to shift its approach to election content prior during, or after an election.
- ▷ If users misunderstand reporting features during election.
- ▷ If prominent users leave the platform in response to election related content on the platform.
- ▷ Responses to external, non-malicious events that may lead to confusion about information veracity (eg rules around an election changing very shortly before the election due to Covid-19, conflicting rules during 2020 racial justice protests, and cities with curfews earlier than voting deadlines).

Actions by political figures or campaigns:

- ▷ If a political figure issues a call to arms encouraging supporters to prevent a peaceful transfer of power.
- ▷ If political figures spread misinformation about voting by mail in order to sow mistrust in election results.
- ▷ If a world leader from a non-election country amplifies a piece of content containing false information.
- ▷ If political leaders share content that clearly or almost violates terms of service.
- ▷ If political leaders or campaigns employ people or groups to get around rules.

Attempts to manipulate or undermine electoral institutions and processes:

- ▷ If a purported official agency account or doctored news videos pushes out false information that calls an election before results are certified.
- ▷ If accounts amplify content that falsely portray a terrorist attack or protests at a polling station.
- ▷ If people using a particular feature to incite disruption to ballot counting or other post-election activities.
- ▷ If a state actor coordinates a disinformation campaign either before and/or after the election.
- ▷ If a politician's account is hacked or their inbox is overrun with attacks and abuse.
- ▷ If platforms are used to spread ['hack and leak'](#) materials that may be real or part of a disinfo effort.

Attempts to manipulate or undermine the platform in an electoral context:

- ▷ If a product is abused or attacked close to an election.
- ▷ If a media campaign forms to criticize a platform for its sudden policy or feature change that affects election content.
- ▷ If violating content is posted, screenshotted, and removed, and the screenshots continue to circulate on the platform afterwards.

Black Swan (high criticality & low probability) events.

- ▷ Global pandemic.
- ▷ Civil war breaks out in stable democracy with low risk profile.

Country prioritization framework

- ▷ If your platform maintains presence in many countries, this is vital to ensuring resources and attention are provided appropriate to the level of election risk in each region.
- ▷ We suggest you create a model combining various inputs into one ranked risk score.
 - ▷ Data inputs:
 - Timeline of when each election is occurring, plus type of election (eg local, national) - [see example](#).
 - Internal elections metrics, eg political post engagement, authoritative information exposure, trust and safety flags/metrics, politicians' account activity.
 - External open-source datasets combined with internal country-level metrics - eg the [Varieties of Democracy](#) project, which highlights political variation in each country and relative severity of risks.
 - [Company risks](#): compliance, legal liability, and reputational risks.
 - ▷ Your framework will weight these inputs differently, depending on principles that affect the risk score output - eg impact (month/daily active users), reach (size of civic content ecosystem), severity (see [offline election violence potential](#)).
 - ▷ Cross-functional stakeholders should also be consulted on the final output of the framework to manually adjust based on qualitative inputs (eg policy teams' perspectives from on-the-ground expert insights).

What to do if local support is limited (part 1)

- ▷ Sometimes there'll be elections in countries where your platform has risks but you lack regional or language expertise, or a large user base.
 - ▷ For example, your team may be engaging with elections in places like Israel, Ethiopia, Malaysia, but without the requisite language fluency in Hebrew, Amharic, Oromo, and Malay.
 - ▷ Inevitably your users will comprise a broader and more diverse group than your employees. Consider India, where there are hundreds of languages spoken including 22 that have some official status in 1 or more states.
- ▷ Here you face 2 critical and related issues: language and local context.
 - ▷ Without both it can be very difficult to assess both objective truth (did the named person actually commit a financial crime?) and emotional impact (eg hateful or inflammatory speech) of content.
 - ▷ Consider not only whether you can read the content, but how the shared experiences of your staff could color or mislead you as you interpret local speech - eg if your organization is primarily US-based, staff may be accustomed to globally-unique levels of speech protections; a highly individualistic culture; 2-party political systems; etc.

What to do if local support is limited (part 2)

- You may need to leverage alternate resources and interventions to provide some election support, but all choices will have serious tradeoffs. Here are some options:
 - Take a hands-off approach - information will flow without effective protections.
 - Leverage partners, including [on-the-ground NGOs](#), who can stand in as culture or language experts in lieu of staff. This reduces efficiency and requires you to identify the right NGOs.
 - Translate and enforce. This may allow action on some egregious examples but at high cost per intervention, and likely with highly-visible errors (both under and over-enforcement).
 - Automation will lose context and nuance; outsourcing is expensive and can bring in bias, especially where political rifts align with language and cultural group membership.
 - Non-content-based enforcement interventions:
 - With enough sophistication these can be effective, but simple versions are often gameable (eg mass reporting). They often perform poorly where interactions across political divides are less frequent, producing bubbles within which harmful content may get little recognition or pushback.
 - Design for reduced exposure or impact:
 - Virality reduction - ie algorithmic or product changes to reduce how fast information circulates
 - Additional friction to vulnerable points that could be exploited -- eg requiring new accounts to exist for a period of time before getting more reach.
 - Amplify reliable information - eg promote quality local news outlets and election authorities.
 - Avoid the problem - leave the market, or decline to accept political ads during the election period.

Team building: Hiring

- ▶ If your company is ready to build a team to support elections integrity, we have some ideas around composition and structure. Core roles to hire for tend to include:
 - ▶ Content policy
 - ▶ Partnerships
 - ▶ Operations
 - ▶ Legal
 - ▶ Communications
 - ▶ Threat intel
 - ▶ Product
- ▶ Not everyone needs to have elections/civic experience, but it's certainly a plus. You might find these folks at:
 - ▶ Other tech platforms.
 - ▶ Digital campaign strategists (political parties, campaigns or vendors).
 - ▶ NGOs working with digital rights, digital security, underserved communities, and other civic spaces.
 - ▶ Corporate risk management firms.
 - ▶ Think tanks (including the Integrity Institute - we're happy to help make connections).

Team building: Structure

There are many ways to organize your team, each with its own pros and cons.

Structure	Description	Pros	Cons
Single organizing team	A single team responsible for coordinating across all the teams at the company working on elections.	Ensures teams are coordinating and that someone is responsible for keeping things moving forward.	Can be a bottleneck in things moving quickly.
Decentralized approach	No central coordinating team, but each team in the company is responsible for thinking about how to tackle elections integrity.	Ensures elections are embedded within teams' activities.	Lack of visibility of challenges and developments across teams, less coordinated approach.
No additional resources and no money to hire external experts	No-one solely dedicated to elections integrity, so it gets absorbed into other work.	Doesn't require much additional work to develop policies or hire specific people.	Reputational risk given other platforms have made election-specific policies. Reporters may question the platform's dedication to the problem. Lack of expertise means you could miss something you don't know to look for.
No additional internal resources but hire contractors for expertise	The company hires experts on elections or other topics to stress test policies, provide risk assessments, etc.	Allows you to get expert input without having to spend the money to hire them full-time.	It costs money to pull in contractors. You might be able to get some of this for free, but it'll require someone at to spend time coordinating.

Team building: Regions

If you've decided to build something in-house, you'll also want to think through whether to run all elections through one team - or if they should report up through different regions.

Structure	Description	Pros	Cons
Central	People working on elections in various countries report into a single team.	Ensures consistent approach across elections, and that best practice is shared. Employees will be on a team with people in similar roles, and likely reporting to a manager who understands what they're doing.	Employees may be less plugged in with what regional teams are doing.
Regional	People working on elections report in to their respective country regional lead.	Ensures employee is up to date with what's happening in the country/region, and coordinates well with other teams on the ground.	Employees may not report to or work with people who understand their role. And it's harder to ensure consistency across countries.

5. Conclusion

Elections matter for online platforms of all sizes. Investing resources, even at a basic level, can help protect your company and democracy.

Conclusion

- ▷ Investing in elections integrity protects your platform directly and indirectly, as well as furthering global democracy.
 - ▷ Elections around the world are continuous. We expect 65 elections across 54 countries in 2024.
 - ▷ Platforms can't abstain from societal events - people talk about what's important to them, which includes politics
 - ▷ Political issues present risk to technology platforms, including regulatory compliance, legal liability, and reputational damage. User activity on public platforms presents serious risks to society and electoral processes.
 - ▷ But elections work also offers opportunity, such as helping catalyzing social movements and positive sentiment from key stakeholders.
- ▷ Your platform, whether large or small, can do this!
 - ▷ To be impactful, elections programs need to be fully cross-functional (product, policy, legal, comms, operations), with support from leadership. Elections should be part of strategic planning, and each organization will need to analyze their structure and define the approach that's best for them.
 - ▷ Companies don't have to go it alone - partners across the industry, academia and civil society offer myriad resources to support your work.
- ▷ For more information:
 - ▷ [Visit the Integrity Institute website.](#)
 - ▷ Follow our work through our [blog](#), [Twitter](#), and [LinkedIn](#).
 - ▷ Look out for our forthcoming guidance, 'Elections integrity best practices: defining and achieving success'.

Thank you

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Working group: Jeff Allen, [Eric Davis](#), Matt Graydon, David Jay, Abby Lawson, [Alex Leavitt](#), Osiris Parik, [Zara Perumal](#), Sabriyya Pate, [Nichole Sessego](#), [Theodora Skeadas](#), [Rebecca Theirn](#)

The following experts and organizations also provided commentary and advice in the development of the deck:

Tom Cunningham
Shug Ghosh
[David Evan Harris](#)
[David Levine](#)
Sahar Massachi
Kristen Murdock

[Natalie Shaw](#)
Tom Reynolds
Bri Riggio
[Sam Toizer](#)
Grady Ward

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Bipartisan Policy Center
National Democratic Institute
International Foundation for
Electoral Systems

6. Resources

Resources for tracking elections, finding partners, and learning about the context of an election.

Key elections: 2023 to 2024

2023	2024
<ul style="list-style-type: none">• May 28, 2023: Turkey (runoff)• June 25, 2023: Guatemala• July 2023: Zimbabwe• October 14, 2023: New Zealand• October 2023: Argentina• November 12, 2023: Poland• December 10, 2023: Spain• December 2023: Bangladesh	<ul style="list-style-type: none">• January/February: First US Presidential primaries• February 14, 2024: Indonesia• March - May: India• March 31, 2024: Ukraine• Before April 20: Taiwan• June 6-9, 2024: EU Elections• July 7, 2024: Mexico• November 5, 2024: United States

See [IFES' full list](#) or the [election cycle calendar](#) for more info.

Links

- ▷ Compliance law firms:
 - ▷ [Covington](#)
 - ▷ [Wilmer Hale](#)
 - ▷ [Squire Patton Boggs](#)
- ▷ Expert networks:
 - ▷ [Duco Experts](#)
- ▷ Election data:
 - ▷ [Democracy Works](#)
 - ▷ [Ballotpedia](#)
 - ▷ [election cycle tracker](#)
 - ▷ [ElectionGuide.org](#)
- ▷ Democracy data:
 - ▷ V-Dem - [Distinguishes between five high-level principles of democracy](#): electoral, liberal, participatory, deliberative, and egalitarian, and collects data to measure these principles.
 - ▷ Freedom House - [Freedom Scores](#), [Election Watch for the Digital Age](#)
 - ▷ IDEA's [Global State of Democracy Tracker](#)
 - ▷ Kofi Annan Foundation - [Tool to predict election-related violence](#)
 - ▷ ACLED - [Tool analyze risk & predict political violence](#)
- ▷ Candidate lists:
 - ▷ [Ballotpedia](#)
 - ▷ Email electionguide@ifes.org for candidate lists for directly elected institutions.
- ▷ Redteaming resources:
 - ▷ [Red team: how to succeed by thinking like the enemy](#)
 - ▷ [Red team handbook: the army's guide to making better decisions](#)
 - ▷ [What is red teaming? Methodology and tools](#)

Finding partners in a particular country

- ▷ Factchecking and information integrity: [International Fact-Checking Network](#), [Alliance for Securing Democracy Information Integrity Map](#).
- ▷ To learn about human rights and connect with local groups (inc journalists): [Access Now](#), [Internews](#).
- ▷ To understand the electoral landscape:
 - ▷ [V-Dem](#)
 - ▷ [Economist democracy index](#)
 - ▷ [Freedom House](#)
 - ▷ Organizations providing technical support for elections: [IRI](#), [NDI](#) and [IFES](#), [IDEA](#), [UNDP](#)
 - ▷ [Atlantic Council DFR Lab](#)
 - ▷ [Carter Center](#)
 - ▷ Find local NGOs who've done work on human rights, civic or media literacy or digital issues (consult the [compendium](#) for some places to start).
 - ▷ [German Marshall Fund's Alliance for Securing Democracy](#)
- ▷ Expert networks like [Duco](#) can also help pull together memos for companies on particular issues.

Overview of regulations

Tech regulations vary around the world and in different states. This area is in active development, so work with your public policy/legal teams to understand your obligations. We aren't lawyers and this shouldn't be considered legal advice.

Type of regulation	Description	Examples
Political ads	Requirements for online platforms in regards to political and issue ads. Usually require 'paid for by' disclaimers, plus databases to see the ads being run along with information on who was targeted.	<ul style="list-style-type: none">• Canada• European Union• Washington State (note that Meta and Google have banned ads in WA because they feel they can't comply)
Privacy/use of data	Requirements around what data platforms can collect, how they can use it and user ability to access/delete data.	<ul style="list-style-type: none">• Europe - GDPR• California
Content moderation	Laws that either give liability protection to companies for the content on their site, or establish requirements for how platforms take down or leave up content. Also provides user rights to appeal content decisions.	<ul style="list-style-type: none">• United States - Section 230• Texas and Florida (on hold pending Supreme Court hearing)• Europe - Digital Services Act
Compliance with government takedown requests	Some countries have instituted new laws that would compel platforms to have local representatives and comply with government requests. Many of these are considered problematic.	<ul style="list-style-type: none">• Turkey• India
Transparency	Requirements for platforms to provide more insight into what's happening on their platforms from content moderation decisions, data access to research and political ads.	<ul style="list-style-type: none">• Europe - Digital Services Act
In-kind donations	In the US there are FEC rules around in-kind donations if a person or company gives goods or services of value to a candidate. The guidance isn't clear, so consult a lawyer if you have different rules for different political candidates or provide them something special that you don't offer others on your platform.	Recent FEC cases about platform conduct: <ul style="list-style-type: none">• Twitter• Google• Snap

Platform approaches, May 2023

Platform	Election-specific policies & content on approach to elections
<p>Amazon</p>	<ul style="list-style-type: none"> • Sponsored ads guidelines
<p>Discord</p>	<ul style="list-style-type: none"> • Prohibit misinformation preventing participation in civic processes
<p>Meta (Facebook, Instagram) - Facebook continues to have dedicated teams focused on election integrity issues. They focus on authoritative information, combatting foreign interference, mis/disinformation and other election integrity issues. They allow political and issue ads. Meta is also the only platform with a policy dedicated specifically to the removal and reinstatement of a political figure's account.</p>	<ul style="list-style-type: none"> • Election and voter interference policy • Hate speech policy • Coordinating harm and publicizing crime policy • Bullying and harassment policy • Political and issue ads policy <ul style="list-style-type: none"> ◦ Availability for ads about social issues, elections or politics • Transparency Center • Facebook for Business • Newsroom Category • About meta.com page • Ad Library • Factchecking partners
<p>Google - Google is the first platform to begin election specific work going back to 2008. They focus on authoritative information, combatting foreign interference, mis/disinformation and other election integrity issues. They allow political ads but with targeting restrictions.</p>	<ul style="list-style-type: none"> • Political ads policy • Elections.google • Ad Library
<p>Hulu</p>	<ul style="list-style-type: none"> • Political ads policy
<p>LinkedIn</p>	<ul style="list-style-type: none"> • False and misleading content policy • Political ads policy
<p>Medium</p>	<ul style="list-style-type: none"> • Election content policy

Platform approaches, May 2023

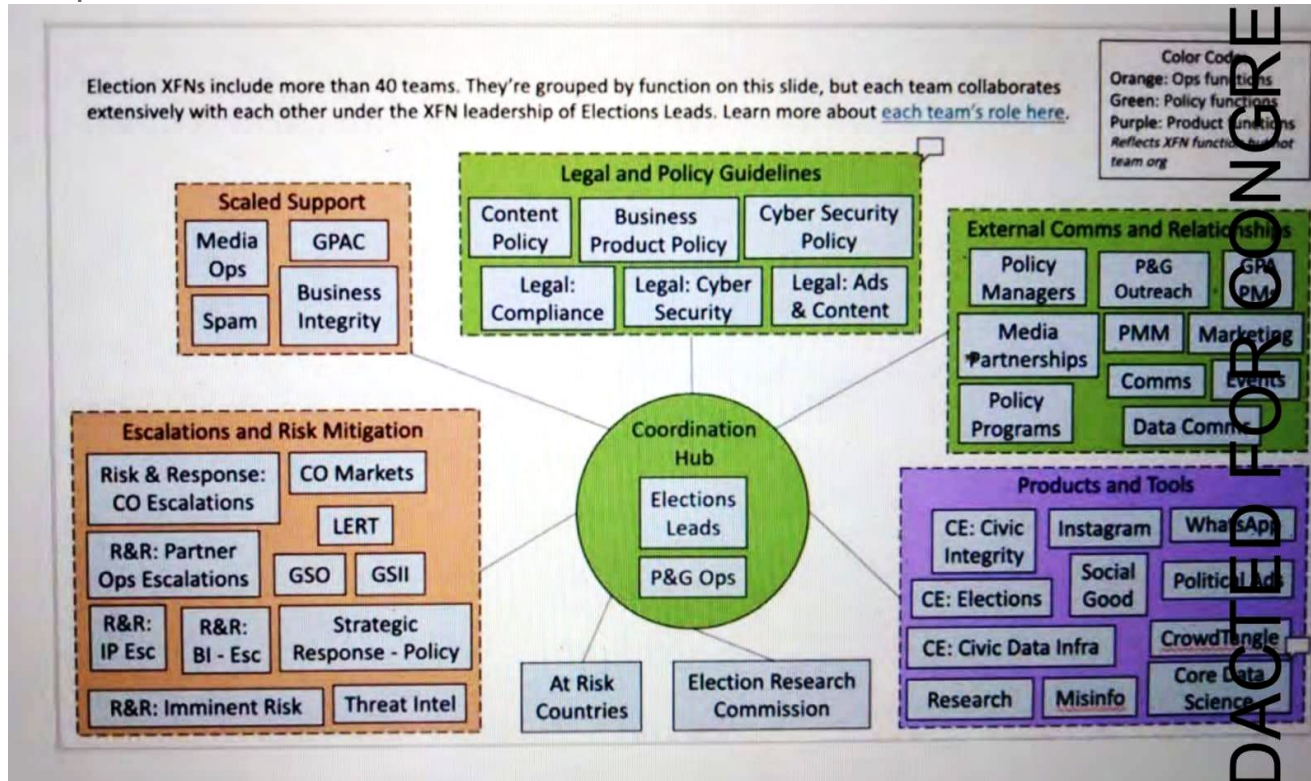
Platform	Election-specific policies & content on approach to elections
<p>Microsoft/Bing - Microsoft has dedicated teams towards combating threat actors and does some work on authoritative information, but due to the different nature of its platform does not have as many resources dedicated. They have banned political ads.</p>	<ul style="list-style-type: none"> • Political ads policy
<p>Nextdoor - Nextdoor has limited staff working specifically on elections. They ban discussion of national political topics except for in groups. They do allow for some discussion of local politics in the main feed.</p>	<ul style="list-style-type: none"> • FAQ - Elections and politics on Nextdoor • Community guidelines for public agencies • Policy on discussing political topics and elections on Nextdoor • Nextdoor election policies • Nextdoor election misinfo policy • Political ads policy
<p>Open AI</p>	<ul style="list-style-type: none"> • Usage policies
<p>Pandora</p>	<ul style="list-style-type: none"> • Political ads policy
<p>Pinterest</p>	<ul style="list-style-type: none"> • Civic participation misinformation policy • Political ads policy
<p>Reddit</p>	<ul style="list-style-type: none"> • Policy prohibiting false information intended to prevent people from voting • Political ads policy
<p>Roblox</p>	<ul style="list-style-type: none"> • Political content policy
<p>Roku</p>	<ul style="list-style-type: none"> • Political ads policy
<p>Snap</p>	<ul style="list-style-type: none"> • Political and advocacy ads policy

Platform approaches, May 2023

Platform	Election-specific policies & content on approach to elections
Spotify	<ul style="list-style-type: none"> • Political ads policy
TikTok - Despite being a newer platform TikTok is rapidly expanding its staffing on protecting the integrity of elections. They focus on authoritative information, enforcing its election policies and have banned political ads.	<ul style="list-style-type: none"> • Government, politician and political party account rules (Only cover state/national level officials, not local) • Policy banning Political ads • Civic and Election Integrity policy (includes political ads and election misinfo)
Twitch	<ul style="list-style-type: none"> • Policy prohibiting civic misinformation that undermines the integrity of a civic or political process
Twitter* <i>Given Musk's takeover of Twitter, it is unclear which of these policies will remain in place. They could change.</i> Twitter's efforts in this space have been decimated with changes by Musk. It's unclear which policies will remain intact for 2024. They had banned political ads but announced in January 2023 that they would start allowing cause-based ones again.	<ul style="list-style-type: none"> • Civic integrity misleading information policy • Political content in ads - Evolving into being allowed again • Civic Integrity Positions and Policies
Vimeo	<ul style="list-style-type: none"> • Prohibits spread of false or misleading information about voting or seeks to obstruct voting
WhatsApp - Because of WhatsApp being end-to-end encrypted, teams focus on spammy behavior and product changes (eg limiting the number of times content can be forwarded) to limit the spread of violating content.	<ul style="list-style-type: none"> • WhatsApp and elections
YouTube - Similar to Google, YouTube is one of the first platforms to begin election specific work going back to 2008. They focus on authoritative information, combatting foreign interference, mis/disinformation and other election integrity issues. They allow political ads but with targeting restrictions.	<ul style="list-style-type: none"> • Election Misinformation Policies

Large platform election integrity organization

An example of the more than 40 teams that worked on elections at Meta (then Facebook) in 2018/2019. This document is in the public domain due to whistleblower leaks.





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