



# TRUSTWORTHY ELECTIONS STRATEGY 2021-2025

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Complementing this strategy is Hewlett’s National Governing Institutions Strategy 2021-2025 (June 2021, [link](#))



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*(Cover image) Sophia Lee helps with ballot sorting ahead of Election Day at the Bill Graham Civic Auditorium on Monday, Nov. 2, 2020 in San Francisco, California. (Gabrielle Lurie/The San Francisco Chronicle via Getty Images)*

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# Executive Summary

The November 2020 elections, held during a pandemic, crystallized the central challenges and opportunities of the U.S. elections system. The system was tested to the point of near failure but ultimately held up thanks to the efforts of a wide range of elections administration professionals, civil society organizations, lawmakers, activists, and others. There was a surge of political participation and, perhaps, a shared recognition of the precarity of our elections system. There was also an unprecedented surge in disinformation and conspiracy theorizing, however, and a disruption in the peaceful transfer of power when a violent mob, encouraged if not incited by the sitting president, stormed the Capitol in January 2021 in a failed attempt to overturn the election results.

The 2020 elections presented us with both a crisis and an opportunity — a crisis in that we cannot assume that our elections system can easily weather another fiercely fought election or a coordinated and conspiracy-laden attack against its legitimacy, but also an opportunity in the increased voter participation and the interest in a resilient and fair elections system. Ultimately, democracy depends on free and fair elections in which all eligible voters can participate without facing undue barriers, and after which all parties, candidates, and citizens — including, especially, those who come up short — trust in and abide by the results. The 2020 election and its aftermath demonstrate that we can no longer take these essential preconditions for democracy for granted. Our strategy to support trustworthy elections is meant to help reestablish and secure them.

The strategy is an evolution of multiple lines of grantmaking within the U.S. Democracy Program. After assessing our current strategies and the growing crisis in U.S. elections, we concluded that we needed to refresh our strategy to respond adequately to what is happening. Since 2014, the U.S. Democracy Program has invested in money-in-politics reform and the promotion of ranked choice voting. We plan to wind down our support of both of those areas — not because we think they are no longer important, but rather to make funds available for the new strategy to support trustworthy elections, which is an important and urgent priority. In 2016, we started grantmaking to combat digital disinformation; after an initial phase of learning and evaluation, we will integrate that work into the new elections strategy and direct our grantmaking toward mitigating the negative impact of digital disinformation on U.S. elections. Finally, the program has invested intermittently in election research and administration since 2014 but has not had a sustained strategy in that area. Our new strategy will build on this experience, and ongoing support for a healthy and trustworthy elections system will be the anchor of our grantmaking moving forward.

This paper outlines the evolution and future direction of our grantmaking strategy. It begins with a survey of the problems undermining trust in our elections that we seek to address. We then map out our refreshed strategy to support trustworthy elections, the goal and outcomes we seek, and the approaches we will take in the three substrategies we will pursue. These include countering disinformation's impact on elections, supporting effective election administration, and increasing citizens' access to voting. Next, we share the evaluation plans and learning questions we will use to assess our progress, and to learn and correct our course as we implement the strategy. Finally, in the spirit of transparency, and to provide background context for our new strategy, we have included an appendix reviewing our prior work to improve campaigns and elections and combat digital disinformation, what we learned in the course of doing it, and the considerations that have led us to adopt our new strategy.

# I. The Problems We Seek to Address

There is much to be celebrated in the almost 250 years of American democracy, but perhaps nothing more so than the continual drive among its citizens for a more perfect union. The task of building and maintaining an elections system to represent and serve as diverse a citizenry as that of the United States is both daunting and incredible, and the history of the system documents on balance an enduring trend toward inclusion. This unique system is arguably at a moment of crisis, however, and Americans are not served by glossing over its deficiencies. In that spirit, what follows is an assessment of the unique history and current challenges of the U.S. elections system and a strategy to shore up this crucial foundation to American democracy.

A central complication is that race, gender, class, and other forms of status have long been intertwined with voting access in ways that are corrosive to American democracy. The American elections system has historically excluded many Americans, whether officially or in practice. Black men were not allowed to vote until the late 19th century, for example, when the 15<sup>th</sup> Amendment was enacted, and women gained the franchise only in 1920. Restrictive measures imposed in the South during the Jim Crow era made it nearly impossible for Black citizens to vote until the bipartisan-backed Voting Rights Act (V.R.A) of 1965. Included within the V.R.A's provisions was a requirement that jurisdictions with patterns of race-based voter restrictions had to submit proposed election law changes to the U.S. Department of Justice for approval (a process known as "preclearance"). The V.R.A drastically reduced racial discrimination in voting, and its preclearance requirements prevented it from creeping back in. However, the preclearance requirement was eliminated in the 2013 Supreme Court decision in *Shelby County v. Holder*, and an ensuing wave of voter laws made it harder to vote in practice in many jurisdictions. The intent of such measures is ostensibly to make voting more secure, but the impact is to make it harder for people to vote in practice and with minimal enhancement of election integrity. People of color, poor people, the elderly, students, and others have been most heavily impacted by these restrictions. We can expect the new wave of state legislation restricting voting proposed in the wake of the 2020 elections to have a similar effect. The sad irony of this latest round of voting restrictions is that they are responding not to any actual and observed problem of voter fraud in 2020, but rather to deliberate falsehoods and conspiracy mongering spread by former President Trump and his loyal copartisans.

More generally, beyond these malign actions, the U.S. elections system is unnecessarily confusing and exclusive. It often feels transactional rather than genuinely representative. Eligible voters are commonly understood through the lens of who they will likely support and the extent to which their vote will decide an election, prioritizing swing voters and swing states rather than all voters. The highly polarized nature of American politics typically inflames the situation further. Opposing political forces accuse each other of dirty tricks to maximize political advantage by prioritizing or marginalizing particular communities according to their perceived political loyalties, thereby exacerbating social and racial divisions and further marginalizing many voters. Thus, the experience of voting — and, crucially, the perception of how inclusive and secure the system is and the need for reform — varies dramatically across age, race, class, geography, and more.

The U.S. elections system also suffers from long-standing structural deficiencies, which have been manifest over the years in long lines, confusing and inefficient procedures from registration to voting, and recurrent scandals. A range of issues contributes to these deficiencies, but they are all based in some way in chronic underinvestment in the elections system by federal, state, and local government. Funding and professional staffing in the country's notoriously decentralized elections system are imbalanced, a predictable outcome of distributing the responsibility to run elections among state and local governments without adequate funding to undertake that responsibility. There is little money to staff elections sufficiently, inform voters of constantly changing rules and processes, or replace failing equipment. The result in all but the most well-funded districts is a shoestring-budget approach that provides the most basic necessities of election administration without investment in the kinds of secure technology, professionalized staff, and long-term planning that could engender trust and encourage participation. That election administration is often overseen by officials from one of the two major political parties naturally raises questions of fairness among the public and lends easily to suspicions of political bias in even the smallest of matters. Given that some of the country's deepest racial and social divisions are so closely intertwined with its electoral politics, even small questions of bias activate much larger fissures.

As in so many areas of modern life, the rapid rise of new digital threats further compounds existing problems. Digital disinformation, cyberattacks, and other digital security threats create barriers to political participation, mislead voters, and further encumber understaffed elections administration offices. Officials have little time, money, or training to prevent or respond to these threats, or to effectively provide accurate information to voters. As with other tactics designed to discourage participation by perceived political opponents, the impact of these tactics often falls heavily on Black voters and others who have historically been marginalized from the system.

Given this context, it is perhaps unsurprising that the American public's trust in U.S. elections has been on a downward trajectory for some time. Many Americans doubt the system's ability to deliver secure and legitimate elections that represent them. The 2000 Florida recount and transition delay were a notorious accelerant of these doubts for many Americans, as have been ongoing partisan campaigns falsely alleging systemic voter fraud and election interference. The latter became more of a fixture in 2015, when then-candidate Donald Trump falsely alleged systemic fraud in the Republican presidential primary elections and the national presidential election that he ultimately won. Subsequently, when Congress was certifying Trump's victory, a handful of Democrats in the House attempted to challenge various states' electoral college votes for Trump under the Electoral Count Act of 1887, but they had no backers in the Senate and were thus gavelled down by then-Vice President Joe Biden.

These longstanding and complex problems now sit within a new context — a time of achievement but also crisis. Well into the 2020 primary season, the COVID-19 pandemic swept the country. The outlook for the national election, to be held only a few months later, appeared dire. Elections officials and the Postal Service had to process massive increases in mail-in ballots, and there were shortages of polling locations and poll workers and of critical personal protective equipment to protect them. In response, a huge number of diverse organizations built strong, localized networks, identified what was needed for their communities to be able to vote, and responded to those needs with real entrepreneurship. This took an unprecedented level of private philanthropy and a massive degree of mobilization across state and local governments, communities, businesses, philanthropy, and more. In the end, the 2020 elections were the freest and fairest in U.S. history, with the highest turnout since 1900 and remarkably good conduct in the face of extreme logistical challenges.

That victory of election administration was quickly overshadowed, however, by a disinformation campaign led by President Trump and echoed by many other elected officials and conservative media personalities. Different extremist groups and online disinformation networks — including far-right political communities, anti-vaccination activists, anti-government extremists, 5G skeptics, white nationalists, and more — **converged** during the fevered early months of the pandemic and **merged into a large network** of conspiracy theory and disinformation communities. The central message — that the election was fraudulent, and a widespread government conspiracy was afoot — surged in the aftermath of the election and spread even among formerly moderate political communities. As with earlier voter-integrity controversies, many of the conspiracies focused on voting jurisdictions containing a majority of people of color, invoking implicitly and sometimes explicitly racist ideas that some voters are more valid than others. This baseless and unprecedented campaign to invalidate elections erupted in a violent attack on the U.S. Capitol on January 6, 2021, as lawmakers sought to ratify then-President-elect Biden's victory. Even after the mob had ransacked the Capitol in their quest to overturn the election results, 147 Republican legislators across both chambers challenged various states' electoral college votes. This disruption of the peaceful transfer of power by a mob with white supremacist militia members and confederate-flag-wavers in its vanguard was a sharp escalation in the assault on election integrity and voter trust, leaving the American public highly polarized and further inflaming some of the deepest and most painful divisions in American society.

The long-term impact of these events is not yet clear, but incredible damage to public trust in elections has already occurred. The Pew Research Center found in January 2021 that **76% of Trump voters** thought that Donald Trump “definitely” or “probably” won the election. It is reasonable to assume a substantial proportion of the losing side of an election will doubt future election results. At a minimum, there are now clear political incentives for future candidates to falsely allege systemic voter fraud, promote conspiracy theories, and spread doubt. The U.S. elections system, long in need of reform and massive infrastructural investment, now faces the legitimate possibility of a crisis in which the only voters that accept the result of an election are those whose preferred candidate or party wins. The deep divisions and inequities that have plagued the system are perfect tinder for an explosive situation that could have negative repercussions across American democracy and for all Americans.

There are many different areas that require philanthropic support in our elections system. Focusing on shoring up the system overall, rather than focusing only on those who have been most marginalized, is pivotal if we are to address the inequities those voters experience. Access to voting in elections that are not ultimately accepted by the vast majority of citizens is not meaningful access and voting in an election that cannot reliably lead to a peaceful transition of power is not genuine political participation. Considering this challenge and relative opportunities within the funding landscape, the trustworthy elections strategy will seek not only to address deep inequities in access, but also to ensure that U.S. elections are secure and accessible in ways that protect the broader public’s trust. That means professionally managed elections in which officials are equipped to communicate effectively with the public; every eligible voter regardless of race, age, political ideology, or geography can readily access trusted election information and easily and securely cast a ballot; and citizens trust in and abide by the results of the election as free and fair, especially including those whose candidate or party loses.

What might inoculate the country against the collapse of electoral legitimacy? What could effectively shepherd the American public through another contentious election? Ultimately, a few lessons from the 2020 elections have guided our thinking in crafting this new strategy. First, one of the main drivers of widespread doubts about the 2020 election result was disinformation, online and off, before and especially after the election. Americans cannot trust an elections system defined by the toxic and largely inaccurate information spread by hyper-partisan actors, and election administrators cannot do their jobs while under attack by purveyors of disinformation. The defining features of this problem will be different in subsequent elections but likely no less severe. Given the centrality of disinformation to the problem and our experience in this area, countering disinformation is a natural fit for the strategy.

Second, elections administrators across the country were arguably the decisive factor in ensuring the successful completion of the 2020 elections and, ultimately, the transfer of power. What could have been a complete disaster turned out to be a remarkably well-run election in large part because elections officials and personnel across the country went to incredible lengths to make it happen. Elections officials may not be able to single-handedly shore up the system, but fair, effective, apolitical administration of elections and certification of the results is essential to maintaining electoral legitimacy.

Finally, historical inequities in voting access are an enduring affront to an inclusive, genuinely representative system that is worthy of the public’s trust. We believe that voting should be easy and secure, and that all eligible voters should be able to trust that their vote was accurately counted, and the real victor prevailed. Voting rights and access can sometimes be a fraught area of electoral reform and is one in which we have relatively little experience, but we are convinced that it is integral to a genuine solution.

## II. Our Strategy for Supporting Trustworthy Elections, 2021-2025

We turn now to the strategy we will pursue over the next four years. The goal of the strategy is to ensure the United States has a fully funded and professionally managed elections system in which every eligible voter can easily and securely vote and in which citizens, including those whose candidate or party loses, trust in and abide by the results.

We have identified four outcomes representing clear and specific changes we hope to see over the next 3-5 years in furtherance of our goal. They include the following:

1. Government policymakers at the state and federal level enact more effective solutions to begin to counter the wide range of negative impacts of disinformation on elections.
2. There is an increase in stable, flexible government funding for state and local elections officials to better plan for and meet local needs.
3. States adopt policies and practices that bolster voter trust in election results, including among voters whose preferred candidate or party loses.
4. All eligible voters, including those from historically disenfranchised communities, can readily and securely cast a ballot. As part of an intentional learning strategy, the U.S. Democracy Program will spend the next two years identifying promising and feasible pathways that best support this effort.

We believe that if disinformation can be contained and countered, election administration can be strengthened and made more transparent, and voting made accessible and secure to the full range of eligible voters, we can expect the elections system to weather the challenges of highly contested elections. Based on these premises, the trustworthy elections strategy comprises three substrategies, which are together designed to counter disinformation's impact on elections, strengthen election administration and funding, and increase access for every eligible voter, particularly those that have long been marginalized from the system. The following is a deeper description of these three substrategies.

### A. Substrategy for Countering Disinformation's Impact on Elections

Online disinformation has now metastasized into what Harvard Kennedy School disinformation scholars and grantees Joan Donovan, Brian Friedberg, and Emily Dreyfuss [call](#) “networked conspiracy, a potent brew of disinformation and rumor enabled by platforms, emboldened by politicians and influencers, and defined by a total lack of trust in the news.” Our understanding of disinformation has grown and changed since this emerged as a major threat to elections in 2016, and we are now able to invest in work to mitigate its negative impact on elections.

Networked conspiracies and disinformation campaigns are designed to engender trust and encourage sharing and community building. The experience of participating in such a community is positive and affirming, something rather rare in American politics today. Just as disinformation is packaged and disseminated according to the unique characteristics of different communities and demographics, so too must be the information that counters it. Much of the Hewlett Foundation's disinformation support in the past has gone to scholars who study the human networks behind these efforts, and the ways that they ensnare and harm people. We will expand our support for this kind of applied research, including the ways in which disinformation campaigns ensnare new adherents and target people on lesser-known platforms and in languages other than English, and the implications of those tactics on elections.



We will also help connect disinformation grantees with elections officials, journalists, and technology platforms to facilitate knowledge sharing and the formulation of new solutions and counter strategies. Many of our current disinformation grantees are already active in this space. Other grantees are mapping out how disinformation campaigns target different marginalized communities and working with community leaders and platforms to counter those threats prior to elections.

We know that disinformation is often designed to discourage people from voting, and to spread myths, chaos, and even violence during election season. We need to build more effective tools and systems to respond to these threats in real time. In 2020, several organizations including Hewlett grantees joined forces to track disinformation flows in real time and worked to counter those threats during the election period itself. We expect these and related efforts will need to ramp up in future election cycles and we will plan to support them.

There are some foundational questions in this line of work. Who is most at risk for being targeted with election disinformation — both for being disinformed and also to spread disinformation? What are the most effective ways of inoculating communities from disinformation's harms, between and during elections? We do not yet know enough about who different communities trust as sources of accurate electoral information, or how to communicate that information most effectively to counter election disinformation. We will have to invest in grantees doing research on trusted messengers and effective counterstrategies to inform solutions, including ways of rebuilding trust.

There are also inherent risks to working on trust in elections. We are assuming that trust can be improved, but that will likely be difficult given that purveyors of disinformation adapt rapidly. A further challenge is scale of the problem, and the fact that it presents differently in different communities, information environments, and platforms. It will not be possible to support bespoke plans for all forms of election disinformation targeting all communities, and we will have to ensure that we are building a robust understanding of this problem and its impacts as we prioritize organizations and audiences to support.

## **B. Substrategy for Supporting Effective Election Administration**

Elections administration personnel, having just pulled the metaphorical rabbit out of a hat in 2020, are under more pressure than ever before. They face a growing range of digital and real-life security threats, constant change in election laws (which they are expected to implement, often at the last minute and with little or no funding), and increasing expectations to debunk disinformation and defend their systems and themselves to a highly polarized public. Following a brutal 2020 election season, much of the community is demoralized and exhausted, yet still underfunded as they prepare for the next election in less than two years (and much sooner for some). The intense criticism and personal threats so many of them experienced in 2020, and the fact that a majority are approaching retirement, pose a real risk that there will soon not be enough trained elections officials.

Chronic underfunding is a cause of, or an exacerbating factor for, most of these problems. Elections offices often lack the budget to adequately fund basic operations, let alone implement best practices or invest in professional development to improve performance. The elections reform community produces ample research on best practices, but elections personnel often lack the time or resources to put that research to use in their own contexts. Lack of funding also means that officials rely extensively on volunteer labor, rather than a trained and professionalized workforce that carries institutional knowledge from one election to the next.

There are important lessons we should learn from 2020, when elections officials demonstrated that they can be highly effective, innovative problem solvers. The Center for Tech and Civic Life (CTCL) conducted a natural experiment in 2020 when they regranted more than \$400 million directly to elections officials across the country, largely bypassing state and federal authorities. CTCL is still processing data from this experience, but early findings show that elections officials, when given adequate flexible resources, are well-equipped to prioritize spending according to their jurisdictions' specific needs and implement research-based solutions to meet those needs.

Election administration may seem at first like a prosaic concern, particularly alongside the fight to ensure that all eligible Americans can vote. We would argue that the professional administration of elections is in fact central to voting access and security, and that a range of relatively simple election administration reforms and supports could result in expanded access and integrity. Furthermore, we believe that flexible public investment that is responsive to the needs of local communities could strengthen the infrastructure of the elections system in ways that will be crucial to withstanding fiercely fought electoral contests in the future. Simply put, election administration is the backbone of representative, accessible elections and therefore must be prioritized as part of the solution.

Elections reforms to make it easier to vote are always contentious and will likely be especially so over the next few years, particularly given that much of the disinformation in 2020 spread falsehoods about a range of common voting practices. Already, the measures that were expanded in some states and newly adopted in others in 2020 to make voting easier and safer during a pandemic (e.g., vote by mail, pre-canvassing, early voting) are the locus of partisan fights. It would be a great disservice to voters if the focus turns permanently to how different reforms impact party performance, rather than their likely impact on access and election integrity overall. It is impossible to know how the politics of these questions will play out, but it is worth exploring the potential for nonpartisan solutions. What if elections officials had increased, sustained funding from both the federal and state level to invest in their systems as they see fit? If elections officials more consistently have a seat at the table with legislators working on elections reforms, can they together build nonpartisan support for electoral reforms among their own communities?

A central activity of this strategy will be support of research on the minimum necessary thresholds for public election funding to support trustworthy elections, advocacy to increase funding at the federal and state level for elections, and exploration of how best to manage and direct these funds. We will also look to support creative solutions and advocacy that can garner support and trust from across the political spectrum. A key premise of this line of grantmaking to ensure adequate public funding of election administration is that the surge in philanthropic funding that helped support a successful election in 2020 cannot and should not be repeated. Sufficiently funding and administering elections is a core responsibility of government.

There are many organizations that we can fund to train elections officials and support them in the face of rising demands and the rapid legal changes we are likely to see over the next few years. We will support grantees working with state-level policy makers and elections officials so that they can work together on policy that alleviates the pressure on the elections system while also improving the voting process in their states and making it more secure. We will also continue to support researchers like those at leading academic centers focused on elections to produce work on best practices and how election administrators can implement them (particularly those that were used in 2020, what we learned, and how that should be applied moving forward), and support a diverse cohort of upcoming scholars in this area. To consider the potential of more ambitious reforms, we are also exploring the possibility of a major multifunder initiative in support of nonpartisan elections system improvements. This would include aggregating funds to the scale necessary to transform the system.

This substrategy carries significant risks. A fundamental challenge, here and in our strategy generally, is the decentralized nature of the elections system. The effort to increase funding and capacity will vary across the country, and we will not be able to develop tailored, local strategies. We will have to work through national organizations and, possibly, regranteeing organizations. We hope that increasing funding in a way that is responsive to local needs and with a commitment to expanding access will help mitigate the historic marginalization of many different communities of voters and reform the system overall in a more inclusive way.

Another major challenge is that elections systems reform is highly politicized, even more so following the 2020 election. The reforms that made voting during a pandemic safe and possible are now in the political crosshairs. It will be crucial to be guided in our strategy by a nonpartisan commitment to support easy, secure voting, but we will have to carefully navigate a highly partisan landscape. We can perhaps alleviate that problem by exploring reforms and organizations most likely to appeal across the political spectrum, but the main driver should be the potential benefit to the system and to voters rather than the current state of political considerations.

## C. Substrategy for Increasing Citizens' Access to Voting

Access to and the ability to participate in elections are at the foundation of trust in the system. People will not trust a system if they feel it is not designed to include or represent them, and voters across the political spectrum clearly feel that way now. There are many barriers to participation in the elections system that make voting difficult. Some barriers are based on discrimination by race and other factors, and other barriers are related to structural issues like underfunding and lack of capacity (which themselves are often because of bias, implicit or otherwise).

Our strategy aims to reduce obstacles to voting with the premise that voting should be easy and secure for all eligible voters, and access should be as widespread as possible. This premise is not without controversy — many argue that voting is a privilege that the state is under no obligation to make easy. Knowing that those with the highest propensity to vote (i.e., those most likely to vote even under the most difficult circumstances) are also the most partisan, however, and firmly believing that every eligible voter deserves to participate, we believe that reasonable accommodations can and should be made to make voting easier while still maintaining a very high degree of electoral security.

A closer examination of the voting access field is necessary to identify where the Hewlett Foundation's grantmaking can make long-term progress. As such, we will approach this work as a learning substrategy with key guiding questions for our early grantmaking. What are the near-term opportunities to support voting access for eligible voters, particularly at time when election reform is highly politicized, and the future of election reform is uncertain? What are the long-term opportunities to build nonpartisan support across the political spectrum for voting access and increased civic engagement?

While voting access is a well-established and well-funded area of work, it is also a new area of grantmaking for the foundation. We will approach it with a learning perspective to determine where we can be most effective. We will do this in part by supporting a long-standing coalition of civil society organizations, lawyers, scholars, and advocates working together to advance a robust set of interventions that expand access to the ballot for Black Americans and other communities who have long been marginalized from the electoral process. These activities include advocating for electoral reforms, restoring voting rights to formerly incarcerated citizens with felony convictions, and litigating restrictive voter laws. We expect to do this by supporting both national civil rights organizations and regranters undertaking state-focused work to fight [court battles](#) across the country.

One area that we already know we can assist with is reframing the effort. How do we support increased access to voting and civic participation outside of a party focus, and move away from tactical, transactional approaches used by campaigns and activists that categorize voters based on assumptions of who they will vote for? This public narrative shift represents a unique body of work that is currently underinvested in by philanthropy and we want to help rectify this. Part of this shift includes rebuilding a national bipartisan consensus on voting rights, the possibility of which we see ourselves as well situated to help explore. There is real (though delicate) interest from both national civil rights leaders and center-right policy advocates to reboot consensus on ensuring access to the franchise for all eligible voters. Libertarians and conservatives at existing grantee organizations are already seeking to advance policy solutions that make voting easier and more secure, and the foundation can play a unique role in fostering these dialogues. We will also work more closely with our existing grantees who are trusted voting rights coalition leaders with real convening power to advance these conversations.

Another possibility for learning more in the voting-access area would be to partner with donor collaboratives to increase civic participation and advance voting rights among historically underrepresented communities. Using an integrated approach to voter engagement and voting rights can help us build experience in an approach that moves beyond a transactional model for voting. Our goal will be to identify areas of work that are catalytic to the field, that can help us learn more about the ways in which trust and access interrelate, and that can help identify promising paths forward.

# III. How We Will Evaluate Our Progress and Learn as We Go

Much of the work outlined above is new to the U.S. Democracy Program, and our intention is to approach this strategy with an orientation toward learning and improvement over time. To that end, we have developed the following evaluation plans and learning questions.

## A. Planned Evaluations of Our Grantmaking

In 2021, we are conducting a developmental evaluation of our efforts to advance diversity, equity, and inclusion within our grantee portfolios and the broader democracy field. The scope of this evaluation is not limited to our trustworthy elections strategy but spans our entire program. We expect that this effort will help us identify and realize opportunities to improve our grant practices and strategies. We will share a public report from this evaluation when it is completed.

The months following the November 2022 midterm elections will provide a natural opportunity to assess the extent to which the three substrategies effectively cover the best opportunities for impact on trustworthy elections, and to integrate any relevant developments from the midterm elections themselves. To this end, we anticipate commissioning a formative evaluation of our exploratory substrategy to increase citizens' access to voting at that point. Further out, in early 2025, the U.S. Democracy Program will commission a comprehensive evaluation of all three substrategies as input into a strategy refresh process that would be completed in late 2025.

In the intervening years, we will assess whether an external evaluation of some other component of our strategy is warranted, or whether our ongoing learning efforts are proving sufficient for our purposes. Any postelection evaluations we commission will be in service of long-term learning to support the overall goal of secure and accessible voting for all eligible voters. We will want to be sure that the disinformation work we support is flexible enough to anticipate and learn from new threats, for example, or that cost estimates for elections are continually updated over time. We will focus on this process of learning and refining and take care to avoid the postelection ebbs and flows that are so common in elections funding.

## B. Learning Questions

Because so much of our strategy is new, we expect to engage deeply with several learning questions over the course of the first 24 months of implementing our strategy to help inform if and where changes would be helpful.

On the first substrategy, countering disinformation's impact on elections, our learning questions are as follows:

1. Who is most often targeted or affected by disinformation campaigns and how is this changing over time?
2. How is the range of disinformation threats changing, and is the disinformation research community adapting to effectively monitor and communicate those changes?
3. How can we help facilitate effective interaction between disinformation researchers, advocates, and elections administration officials to counter threats to elections?
4. What are the emerging opportunities for reform to social media and elsewhere that could mitigate the negative impacts of disinformation on elections?

On the second substrategy, supporting effective elections administration, our learning questions are as follows:

1. What kind of data and evidence should inform elections cost estimates? What gaps in data remain, and who is well-positioned to fill those?
2. To what extent and how are elections advocates supporting effective election administration, in addition to other electoral reform efforts?
3. What are the key challenges and threats that election administration personnel are facing, and how can we most effectively support them in response?

On the third substrategy, increasing access to voting, our learning questions are as follows:

1. Is it possible to rebuild a bipartisan consensus around voter access? And if so, what are the pathways through which a consensus could form and advance?
2. Are there underfunded opportunities to expand access to voting, and are we well-positioned to help push them forward?
3. Given our commitment to the lean-staffing model and our inability to closely follow state-level reform, should we focus on regranteeing organizations and/or federal reform efforts?

## IV. Conclusion

The 2020 election highlighted severe vulnerabilities in the U.S. elections system, but we have an incredible opportunity in the task of strengthening our system. If we can learn from and support the efforts of elections administration personnel, a wide range of civic engagement and elections reform organizations, and the voters who showed up to the polls in record numbers, we can help build an elections system that is genuinely inclusive, representative, and worthy of the public's trust.

It is never easy to wind down strategies where there continues to be a significant need, but the current landscape of U.S. democracy requires us to make difficult choices. The U.S. Democracy Program has garnered extensive experience in elections and disinformation and is now well-positioned to combine those in a strategy to support trustworthy elections. Focusing our grantmaking toward this goal will take from the best of what we have done and concentrate our impact in one of the most important parts of U.S. democracy right now. This strategy is designed in pursuit of specific goals but also to learn over time, as the opportunities in the electoral landscape change and we learn more about how to help all eligible voters participate in elections.

# Appendix: Looking Back at and Learning from Our Prior Work

Our strategy to support trustworthy elections builds on several lines of grantmaking we have undertaken over the past seven years. In the spirit of transparency, and to provide background context for our new strategy, this appendix reviews the outcomes we sought, work we supported, and lessons we learned in this earlier work, as well as the considerations that have led to our plans to reorient it.

## A. Our Strategy to Improve Campaigns and Elections, 2014-2020

The U.S. Democracy Program (at the time called the Madison Initiative) launched its strategy to improve campaigns and elections in 2014. This work targeted the outsized influence of big money in politics and the U.S.'s winner-take-all system, understanding that both constitute perverse incentives for politicians of all parties to cater to a small group of highly polarized, ideological individuals and thereby disincentivize deliberative, collaborative, problem-solving approaches. The strategy came to zero in on two specific outcomes:

*Outcome 1: Members of Congress are less beholden to wealthy donors and intense policy demanders advancing polarizing and/or self-interested agendas, and they are more responsive to the diversity of perspectives and interests among their constituents.*

*Outcome 2: Electoral reforms reduce polarization, give voters more choices, ensure those elected are backed by a majority, and better represent the diversity of opinion in the electorate.*

More concretely, this strategy sought to encourage candidates and elected representatives to be more responsive to their constituents than to their donors, to reduce the amount of time elected officials spend on fund-raising, to decrease the polarizing influence of narrow-interest lobbyists and ideological donors in the political process, and to give parties and candidates reasons to broaden their appeals beyond their most hard-core supporters. Grantmaking for this strategy included support for organizations that illuminate and address problems in the campaign finance system, and organizations that promote ranked choice voting (RCV) and related electoral reforms. A description of these two distinct lines of grantmaking follows.

### 1. Money in Politics

Our experience in money in politics reform has proven to be complex and difficult, but not without successes. Significant avenues for progress have not yet emerged, but we have helped build interest on the political right in this issue and provided crucial support to the organizations that provide the data necessary for understanding and reforming the campaign finance system. We are confident both efforts will strengthen the potential for sustained and effective reform when the opportunity emerges.

Recognizing that jurisprudential pathways to campaign finance reform seemed increasingly remote, and that many other philanthropic funders were backing away from this area, we sought in 2018 to explore with grantees and experts how the foundation could support progress in this area. Almost everyone, citing how deeply partisan the issue of money in politics had become, felt that it was necessary to continue to develop messaging and engagement strategies to raise the salience of the issue, shift the incentive structure, and build political will among conservatives and sitting members of Congress. Interviewees identified a range of potential paths forward, but there was no consensus on which would be most effective, and there were serious doubts that worthwhile outcomes were possible within five years. This realization was sobering for us, and likely also for other funders that had already begun to scale back their involvement or left the field entirely.

Knowing that major policy reforms were unlikely in the near term, we focused on areas that would hopefully make progress easier when an opportunity arises. One area of success in this work was our effort, initiated in 2014, to elevate the case for money in politics reform on the political right, given that sustainable progress in this area will require bipartisan support. Two of our grantees, Take Back Our Republic (TBOR) and Issue One, are nonpartisan organizations that communicate the importance of reform in this area from a conservative and bipartisan perspective, respectively. Our support of their work has helped preserve and grow support for this issue on the right side of the political spectrum. We are pleased to have backed this growing movement and are confident that it will continue after we wind down this work, particularly as some in conservative circles grow more concerned about internet-based giving and small donations from progressive donors, and see the need for reform and transparency in the massive flows of money to political candidates.

Our funding for organizations that aggregate and analyze campaign finance data to support transparency and reform efforts has also been important to the field. An [evaluation](#) of this work found that campaign finance data intermediaries play a unique role and are necessary to the ongoing success of the reform movement by tracking down and organizing disparate and often badly organized data sets and making them readily available to journalists, watchdogs, transparency and reform advocates, and citizens in a user-friendly format. The foundation's three original grantees operating in this space — the Center for Responsive Politics (CRP), the National Institute on Money in State Politics (NIMSP), and the Campaign Finance Institute (CFI) — were all well-known, respected, and valued. Their data and insights inform virtually all reporting and research on the topic as well as the watchdogging undertaken by other advocacy and transparency groups, including several in our portfolio.

These organizations have all been hard-pressed, however, to sustain funding for their core work. They were under enormous pressure to develop additional projects and demonstrate impact on specific issues, but those efforts often distracted from their essential functions as data intermediaries. Aggregating and analyzing data is crucial for reporting, transparency, accountability, and reform work, but was not enough by itself to attract sufficient funding. These challenges led us to encourage and support merger talks among these grantees in hopes that combining forces would allow them to streamline their operations and fundraising while enhancing their impact. Since that time, CFI has with our support merged into NIMSP, which subsequently rebranded itself as the National Institute on Money in Politics (NIMP). In early 2021, NIMP merged with CRP to form [OpenSecrets](#). The Hewlett Foundation was pleased to help these organizations join forces, and we are committed to funding OpenSecrets as it consolidates and continues to enrich its essential work over the next four years. In the long run, we trust that our catalytic support for a stronger and more sustainable foundation of accessible data in this issue area will be helpful when future opportunities for reform arise.

## 2. Ranked Choice Voting

We believe that RCV encourages candidates and parties to engage in more constructive, less polarizing campaigning — given the need to campaign to voters beyond one's base — and results in election winners who represent the consensus preference of a majority of voters rather than the first choice of a fraction of voters. RCV will also likely work to minimize, if not eliminate, the spoiler effect of candidates who are unlikely to win but end up splitting a significant portion of the vote.

The RCV field has developed considerably since we started grantmaking in this area in 2014. We began by supporting FairVote, the one national advocacy group that had long been dedicated to this issue, which was punching well above its weight. We sought to help FairVote carry out its plans to bolster its organization, expand its base of support, and most importantly engage and mobilize other leaders and organizations in this effort. Thanks to the efforts of FairVote and other funders now supporting this electoral reform, the advocacy coalition supporting RCV is considerably more expansive and diverse today. It includes other grantees organizations like New America, the Campaign Legal Center, and Take Back our Republic, as well as other leading advocacy groups in the field.



RCV itself is now something of a cause célèbre among democracy reformers, political observers, and celebrities. Many funders, with both (c)3 and (c)4 money, have started to invest heavily in this field. There have been some major wins in the effort to adopt RCV across the country, including on a statewide-basis in Maine and Alaska, in New York City and a number of other cities, and at different levels of the electoral process (e.g., party primaries, local elections, etc.). We are proud of the catalyzing effect of our early support in this area in raising up this important reform and are confident that the many donors who since entered this space can sustain its efforts as we wind down our support. We also plan to continue to fund as an integral part of our trustworthy elections strategy the Ranked Choice Voting Resource Center, a grantee we have supported since its startup, which provides essential support and technical assistance for election administrators working to implement RCV once their jurisdictions have adopted it.

We have learned a lot through our experience in RCV grantmaking, including our limited ability to be helpful in this field as the focus shifts from building up general awareness and support to getting electoral reform systems passed into law. There were times when our role as a c(3) funder has limited our utility in this area, given that much of the work conducted on RCV is in grassroots legislative advocacy and is campaign-specific. There were ample opportunities to support important work but most require c(4) dollars, and the fact that we do not have c(4) capabilities limited our ability to lead. The foundation's lean staffing model also presented a challenge given that the RCV opportunity landscape differs by state and city. This was clear in our experience in Maine. State- and city-focused work requires a level of local knowledge and a local network to genuinely understand the opportunities and pitfalls within local efforts to promote RCV. A [historical assessment](#) we commissioned on this work in Maine suggested that RCV campaigns can be quite polarizing, making an understanding of local dynamics even more important when picking grantees. In the end, it was not feasible for a single program officer (with other portfolios to develop and oversee) to closely track and respond to opportunities in the RCV space.

### 3. Winding Down Our Support for Money in Politics and Ranked Choice Voting

The lessons and challenges we experienced in both RCV and money in politics would not have been enough by themselves to convince us to exit these fields, particularly given that our winner-take-all system and the polarizing influence of money in politics continue to be problematic, and there are still opportunities for impact. However, much has changed internally and externally since these strategies were developed. Internally, our program is supporting more lines of grantmaking and grantees than is sustainable with a \$20 million budget and two program officers, so it is necessary to exit some of our current grantmaking. More importantly, we believe that a growing crisis in U.S. elections threatens the foundation on which U.S. democracy is built. The 2020 elections represented a rupture in a system that has been struggling for quite some time. The unprecedented stresses to the system and plummeting public trust together constitute the most urgent challenge to U.S. democracy at present, and so we concluded that it makes the most strategic sense at this point to significantly wind down our support in these two fields in order to turn to elections.

## B. Our Strategy to Combat Digital Disinformation, 2017-2020

We developed our strategy to combat digital disinformation in the wake of the 2016 election, when it appeared that disinformation on social media was exacerbating partisan tensions in the country, possibly to the point of interfering with U.S. elections. A central goal was to learn more about the problem of digital disinformation and its impact on political polarization in the United States. The portfolio supported a range of research projects, including computational science and applied research grants. It also included a major partnership project with Social Science One (SS1) and the Social Science Research Council (SSRC), designed to foster research partnerships between academic researchers and Facebook. Our overall strategy was designed to pursue the following outcome:

*Outcome: Digital media platforms are less prone to being manipulated in polarizing ways via large-scale dissemination of inflammatory, inaccurate, and/or highly partisan disinformation.*

Our grantmaking supported learning about this constantly changing problem, and our grantees have produced powerful insight about disinformation and efforts to counter it. An [evaluation](#) that we commissioned on the SSRC-SS1-Facebook project, for example, found that it helped answer key questions and generated crucial methods for how independent researchers could partner with Facebook to access and study internal data about disinformation flows and consumption. While not without its challenges given its complexity and urgency, that project piloted an innovative partnership model and revealed important parameters to improve data access and safeguard academic integrity. Those lessons have been foundational to continuing partnerships between Facebook and researchers. We do not fund these ongoing efforts, but they were facilitated by our early support in this area.

Our grants to build a network of interdisciplinary disinformation researchers were also quite helpful. This research community — which includes political scientists, legal scholars, computer scientists, technologists, economists, historians, anthropologists, and more — has flourished in recent years, and many of the community-building measures that the foundation supported contributed to that growth. This multidisciplinary work has been especially effective in elucidating the fundamentally human nature of disinformation, the human networks behind disinformation flows, and the ways in which people and communities are impacted by and respond to disinformation. This human-centered approach has helped change the focus from the disinformation itself to its impact on people and on our democracy. This helps build a fuller understanding of the range of impacts that disinformation has, and we will continue to build on that work to develop better solutions to counter disinformation.

Our [evaluation](#) of this strategy surfaced a few conclusions. First, focusing on the supply and flow of disinformation on different platforms, rather than the impacts of disinformation on the people it targets, produces a narrow understanding of the problem. Purveyors of disinformation find people where they are and target different communities based on the platforms, language, and media ecosystems where they are most active. It is important, then, to study the networks that produce and manipulate content, and the people that are targeted by that content, regardless of where and how the content circulates, whether it be among white Evangelicals or immigrant communities. There is now more attention on the many ways that disinformation targets different demographic groups and communities, and many of our grantees have led the way in broadening the public's understanding of disinformation and its impacts.

The evaluation also crystallized the difficulty of grantmaking in such a wide-ranging problem area. Digital disinformation is a constantly evolving tactic leveraged across a diverse array of political topics, including public health, climate change, elections, local politics, and far more. There are commonalities in disinformation efforts across these spheres, and instances in which disinformation networks from different spheres converge for shared purposes, but it would be impossible to design a strategy to counter all of the potential harms of disinformation because they are so different in different contexts. For example, anti-vaccination disinformation and climate change disinformation might share similar approaches but solutions to counter them differ significantly. For conceptual and practical reasons, we felt it was necessary to narrow the focus to specific harms, and hope that the experience gained in mitigating those harms can be useful to other efforts to counter disinformation. Given that disinformation has emerged as one of the single largest threats to trust in and the integrity of U.S. elections, the urgent need for solutions in this space, and our significant overall grantmaking experience in elections, we concluded that elections were a natural place for us to focus our disinformation work. We believe that we can build on our early successes in disinformation research to support the development of solutions to counter disinformation's negative impact on elections.

## C. Our Intermittent Support for Election Administration, 2014-2020

The U.S. Democracy Program has not had a dedicated strategy for elections support but has often worked with other funders on election administration research, implementation, and reform since 2013. Several long-standing grantees are deeply engaged in election work, including the Brennan Center for Justice, Issue One, Campaign Legal Center, and others. In the early days of the Madison Initiative, grants for academic research on primary elections (recipients included the Brookings Institution, Clark University, and Yale University) helped inform and shape the Initiative's strategy on polarization.

Much of the program's elections support has been in response to unique opportunities for impact or in support of field-wide priorities. In its early days, we joined the Democracy Fund, the largest funder in this space, to support the Bipartisan Policy Center's (BPC) elections program, which was launched to help implement the recommendations of the 2013 Presidential Commission on Election Administration. We also contributed to the Pew Charitable Trusts' elections initiatives for voter registration system improvements, enhancement of the Elections Performance Index, voter information, and improvements to the voter experience. In 2016, the program made a \$1.4 million grant to launch MIT's Election Data and Science Lab, a central source for academic research on election administration led by Charles Stewart. We also supported the founding of the Center for Election Innovation and Research (CEIR), which handles the critical "back end" of the voter registration list organization ERIC (Electronic Registration Information Center) and works with a bipartisan network of state elections officials on a range of election administration issues and reforms.

In 2017, we felt the need for an emergency response to the Trump administration's creation of the Presidential Advisory Commission on Election Integrity, which seemed likely to further spread a wave of unfounded allegations of systemic voter fraud. We supported a communications campaign to educate the public about facts on election integrity to counter inaccurate information coming from the administration and the Commission.

It was clear that the 2020 elections would face unique threats, at a minimum because of the high degree of partisan rancor and distrust. In early 2020, in partnership with other funders, we underwrote a UC Irvine conference on the likely challenges of the election, the resulting [report](#) of which became highly influential as the situation grew more dire following the beginning of the COVID-19 pandemic. We requested and received a special allocation of \$2.5 million from the board at the March 2020 meeting to respond to the emerging problems. With this allocation we supported efforts by the Center for Civic Design, CEIR, MIT, BPC, Stanford, the Ohio State University Moritz College of Law, More in Common, and the Center for Technology and Civic Life to respond to these challenges, in addition to a \$1 million contribution to the Trusted Elections Fund for emergency response purposes.

As this historic overview illustrates, the U.S. Democracy Program has alternately surged and retreated in its elections support. Our grantees have had impressive impact. They include the leading experts on election law and reform, and many were central to the successful administration of the 2020 elections in the face of unprecedented adversity. The tendency to engage in grantmaking only in relation to specific elections or in response to crises is a well-documented problem in elections work, however, and there is a huge need for sustained investment over time, outside of the electoral cycle. Hence, we went into our surge in 2020 with the idea that we should consider our latest round of grantmaking an exploration of what a deeper and more sustained investment could look like if it turned out to be warranted. Based on what we have learned over the past year during this exploration, we have concluded that it is.