

Methods and transparency note

Threat-Tactic Prioritisation for US Election Integrity Research

Tactic Prioritisation Process

US Election Integrity Research

This document describes the process for prioritising threats and counter-tactics to identify a single tactic for deep-dive research and CSO evaluation. The work was organised into two parallel tracks (threat prioritisation through expert interviews and threat severity assessment, and tactic filtering through Filters 1–3), which converged in a final selection phase (Filter 4 and tiebreaker).

Process Overview

Phase	Activity
Phase 1: Parallel tracks	Two tracks ran in parallel. Threat prioritisation track: expert interviews were conducted and a structured threat severity assessment was completed, producing a High/Medium/Low rating for each identified threat. Tactic filtering track: Filter 1 (already properly resourced) and Filter 2 (time applicability) were applied as team judgment calls, and Filter 3 (evidence floor) desk research was conducted across surviving tactics.
Phase 2: Convergence and selection	Outputs from the two tracks were combined: tactics that survived Filters 1–3 and targeted threats rated Medium or High in the severity assessment proceeded to Filter 4 (theory of change). Where multiple tactics remained, expert enthusiasm (whether an interviewee had mentioned a tactic as promising or underinvested) served as a tiebreaker to select the deep-dive candidate.

Phase 1: Parallel tracks

Expert interviews

We conducted structured interviews with five subject-matter experts selected from an initial longlist of 21 candidates spanning cybersecurity, election integrity, law, academia, and civil society. In each interview, experts were asked to identify the most significant threats to the integrity of the 2026 U.S. midterm elections and which two or three threats they would most want civil society to focus resources on before November 2026.

Interviews were conducted under the Chatham House Rule: insights could be used in the research, but nothing was attributed to individuals or organisations without explicit written permission. Each interview lasted approximately 30 minutes and followed a semi-structured format covering four

core areas: (1) the most significant threats to the integrity of the 2026 US midterm elections; (2) which threats concerned the expert most, and why; (3) the feasibility of addressing those threats before 2026, including which interventions appeared most effective and where additional resources could make the biggest difference; (4) and specific civil society organisations effectively countering the threats identified. Experts were also asked to recommend additional experts for the research team to consult.

Limitations and Weighting

Experts were selected to cover a diverse range of specialisms. However, where an expert's field was narrow (for example, focused primarily on cybersecurity rather than broader threats to U.S. democracy), that potential bias was accounted for in the analysis so as not to skew tactic selection.

Analysis

The universe of threats and tactics analysed was assembled by the research team from a structured literature collection (academic sources, civil society and election-integrity organisations, and legal trackers), not from the interviews. Interview data were used to record expert views on this pre-defined set: each tactic received an expert assessment, coded in a tracking spreadsheet and classified as endorsed, not mentioned, neutral, or does not support.

Expert views on individual tactics were recorded separately and considered alongside the filtering results applied to the literature-derived tactic set, with expert enthusiasm serving as a tiebreaker where multiple tactics survived all filters. Where an expert did not independently raise a particular tactic, this reflects only the bounded scope of a 30-minute interview, not a judgment that the tactic was ineffective.

Explanation of the Filters

Filter 1 Structurally well-served?

Tactics were assessed for whether they fell into a category already dominated by well-organised, well-funded players. No additional research was required; this was applied as a team judgment call.

✓Pass	✗Fail
No obvious dominant, well-funded player category already doing this systematically.	This is structurally a litigation, GOTV, or similarly non-neglected tactic type where a relatively small influx of funds is unlikely to make a large marginal difference.

Filter 2 Accomplishable in time to address 2026 election threats?

For all tactics surviving Filter 1, researchers assessed whether the tactic could realistically be completed in time to improve the integrity of the 2026 elections or their certification.

✓Pass	✗Fail
If proper resources are invested in the tactic, it could reasonably be achieved in time to influence 2026 election integrity	It is either impossible or very unlikely to implement the tactic in a timely manner to address 2026 election integrity threats.

Filter 3 Evidence floor

For all tactics surviving Filters 1 and 2, researchers conducted desk research to assess whether meaningful evidence existed that the tactic works, not just that it is described in the literature, but that it has been evaluated with positive results.

✓Pass	✗Fail
At least one credible case study, survey evidence, practitioner-documented outcome, or systematic review supporting the tactic's effectiveness meets the bar. Higher-quality evidence (RCTs, quasi-experimental designs, large-N impact evaluations) is preferred where available but is often hard to come by in this field; its absence does not disqualify a tactic supported by the evidence types above.	Only theoretical/conceptual arguments, opinion-based endorsements, or anecdotal claims with no documented real-world outcomes. Purely speculative mechanisms with no empirical support of any kind.

Aggregate Expert Threat Rankings

We tracked which threats were most frequently nominated as significant across interviews. These nominations were one input into the threat severity assessment described below, alongside the structured evidence review. Threats rated Medium or High in that assessment defined the tactic universe for Filter 4.

Threat Severity Assessment

We assessed the expected impact of each election threat on voter participation (turnout), election certification integrity, and the peaceful transfer of power in competitive 2026 races. The output is a severity rating (High / Medium / Low) for each of the eight election threats identified in Phase 1.

Assessment Framework

The central question guiding each assessment was: What is the expected impact of this threat on the integrity of competitive 2026 elections, specifically on voter participation, election certification integrity, and peaceful transfer of power? A threat was deemed "meaningful" if it could plausibly (a) shift turnout or vote share by ≥ 1 percentage point in competitive 2026 districts or states, or (b) materially compromise election certification integrity or the peaceful transfer of power in competitive jurisdictions. Ratings are specific to the 2026 midterm cycle; the same threats may warrant different ratings for future election cycles.

Originally, the assessment included only the impact on voter turnout, but the research team subsequently added additional indicators: the impact on election certification integrity and the peaceful transfer of power.

Evidence Review Process

Each threat was assessed through a structured four-step evidence review, followed by a synthesis rating. The steps were applied sequentially:

Step 1: US Precedent Review

For each threat, researchers first determined whether it had materialised in the United States within the past 30 years, drawing on academic databases, the Brennan Center for Justice, Democracy Docket, and election law sources. Where clear quantitative evidence of voter impact existed, such as

peer-reviewed studies or government reports measuring turnout effects, it was documented directly. Where no quantitative evidence of voter impact could be identified, this was stated explicitly, along with an assessment of whether the absence reflects genuine low impact or a gap in available research.

Step 2: International Precedent Review

International precedent was reviewed when US evidence was absent or thin, or when international cases added important context to existing US evidence. The focus was on the effect of the threat on voter participation and public confidence in elections, not merely on whether the threat had occurred abroad.

Step 3: US Transferability Assessment

For each threat, the research assessed whether the effect observed in precedent cases would be larger, smaller, or qualitatively different in the US context. This was a structured qualitative judgment, not a literature-dependent exercise. Five dimensions of the US institutional context were considered systematically: (1) Federalism (2) Judiciary (3) Civil society (4) and Media landscape.

Step 4: Current Trajectory Assessment

Each threat was classified as escalating, stable, contained, or declining based on developments from early 2025 through March 2026. This assessment drew on news reporting, legal trackers (including Democracy Docket and the Brennan Center for Justice), and expert commentary. Academic sources were not required for this step; the goal was a timely, informed assessment of trajectory.

Severity Rating Framework

The findings from Steps 1–4 were synthesised into a single severity rating for each threat. Each rating was accompanied by a 2–4 sentence rationale designed to be self-contained, so that a reader encountering only the rationale should understand why the threat received its rating. The rating categories are defined as follows:

High

The threat has demonstrably suppressed voter participation, compromised election certification integrity, or disrupted the peaceful transfer of power at meaningful scale (≥ 1 percentage point turnout or vote-share shift in competitive races, or material compromise of certification or peaceful transfer).

The current trajectory is escalating or uncontained. There is no strong reason to believe US institutional safeguards would neutralise the effect. All conditions must be met.

Medium

The threat has affected voter participation, election certification integrity, or the peaceful transfer of power in documented cases, but effects were modest or localised; or strong international precedent exists but the US institutional context provides meaningful mitigation; or the current trajectory is mixed, with some containment but not fully resolved. Any one condition is sufficient. This threshold is intentionally the most inclusive, reflecting a deliberate decision to err on the side of not prematurely dismissing threats.

Low

Limited or no precedent for meaningful impact on voter participation, election certification integrity, or the peaceful transfer of power. US institutional safeguards are strong and currently functioning. The current trajectory is stable or declining. All conditions must be met. "Contained" is used only as a trajectory descriptor, not as a separate severity rating; if a threat is real but actively countered with minimal projected 2026 impact, it is rated Low with containment noted in the rationale.

Key Methodological Principles

Four principles guided the severity assessment throughout. First, absence of evidence was not treated as evidence of absence: where a threat had no measured voter impact, this was stated explicitly, with an assessment of whether the absence reflects genuine low impact or a gap in available research. Second, uncertainty was acknowledged rather than concealed: a Medium rating with a transparent rationale about what remains unknown was considered more useful than a confident Low rating that glosses over unknowns. Third, the assessment prioritised timeliness over comprehensiveness: the goal was a thoughtful, structured rapid assessment, not an exhaustive literature review. Fourth, all sources were documented to ensure that the reasoning behind each rating can be independently traced and verified. Human researchers verified all sources and built a Zotero library in which sources can be searched back.

See the **Threat Assessment tab** in the election integrity spreadsheet for the results.

Use of AI Tools

AI-assisted tools (specifically Claude, developed by Anthropic) were used during this research process to support desk research, evidence synthesis, and drafting. AI outputs were treated as preliminary inputs: all findings, ratings, and written content were reviewed, verified, and edited by the research team. No severity rating, expert ranking, or final recommendation was generated solely by AI. The research team retained full editorial and analytical judgment throughout the process.

Phase 2: Convergence and selection

Confirm Threat Priorities

Threat rankings were updated with data from the remaining interviews. The priority threat list was adjusted where final interviews materially changed the picture.

Filter 4 Theory of change

For each tactic surviving Filters 1–3, researchers wrote a 3–5 sentence assessment addressing all five questions below. Tactics were dropped where the logic did not hold, the conditions were not present in 2026, or the realistic scale was too small to matter in competitive races.

✓Pass	✗Fail
Logic holds, required conditions are present in 2026, and potential reach is meaningful relative to competitive race margins.	Logic does not hold, required conditions are absent, OR realistic scale is too small to affect outcomes even if the tactic works perfectly.

Theory of Change: Five Questions

1. Who does this tactic reach, and how?

2. What is the mechanism by which it counters the threat?
3. What conditions need to be true for it to work?
4. How many voters could realistically be protected?
5. Is that scale meaningful relative to margins in competitive 2026 races?

Expert Enthusiasm: Tiebreaker Only

Where multiple tactics survived Filter 4, researchers checked whether any expert had volunteered a surviving tactic as promising or underinvested during interviews. This was treated as a positive signal only, used to elevate, not to eliminate. The tactics with the strongest expert enthusiasm were selected as the deep-dive candidates.

See the **Tactic prioritisation tab** in the election integrity spreadsheet for the results.

The goal of this process was to identify the most promising tactics for deep-dive research, from which the team would identify and evaluate CSOs to recommend to funders. Where multiple tactics survived all filters and the tiebreaker did not produce a clear winner, the research team convened to make a final decision.

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