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Welcome to the U.S. Election Assistance Commission's Guidebook on Successful Practices for Poll Worker Recruitment, Training, and Retention

Background and Purpose. The U.S. Election Assistance Commission (EAC) was established by the Help America Vote Act (HAVA) of 2002 to serve as a coordinating center for the Nation's election officials. Congress directed the EAC to research and compile a broad spectrum of "best practices" employed in preparing for and conducting elections, drawing on the collective experience, and wisdom of seasoned election administrators and community leaders, and to make these practices and procedures available to all.

This guidebook is the result of a 17-month applied research study commissioned by the EAC in 2005 and implemented through a partnership with IFES (formerly known as the International Foundation for Election Systems), The Poll Worker Institute, and the League of Women Voters.

This guidebook presents, for the first time, a framework for evaluating election-jurisdiction administrative practices based on interviews, surveys, and feedback from thousands of election officials and other community leaders nationwide. It is, necessarily, a "snapshot" of poll worker recruitment, training, and service practices across America in a limited period of time.

This guidebook is offered as a manual for election-jurisdiction administrators and others who assist in the ongoing effort to train and staff polling places with workers who contribute their time and skills for this fundamental exercise in the American political process. Flexibility is key: this guidebook presents a variety of field-tested techniques that can be adapted by election jurisdictions of varying sizes and demographics. Not all ideas and techniques

will be relevant to every jurisdiction; the varying requirements imposed by individual State laws, local regulations, and time constraints mean that each jurisdiction must develop its own approach to poll worker training and service. Ideas and practices from all sources were subjected to three important criteria for inclusion in this guidebook: Can the results be measured? Can the practice be sustained in a given jurisdiction over time? Can the practice be replicated elsewhere? An attempt was made to gauge the effort necessary to implement each practice and to determine the resources required and the costs and benefits associated with the practice.

The EAC trusts that election administrators and community leaders will find this guidebook a useful source of ideas and techniques that they can adapt to the circumstances of their particular jurisdictions.

CHOOSE!

NOVEMBER 02 2004

Good design makes choices clear.

Within the election community there is a tremendous wealth of experience and expertise in recruiting, training, and retaining poll workers. Over the years, election officials have devised innovative and resourceful methods for meeting the challenge of staffing polls on Election Day. The limitations of time and resources, however, have hampered efforts to share this expertise throughout the election world. This guidebook attempts to make that knowledge and expertise widely available.

- **Gathering Field-Tested Practices.** Every practice recommended in this guidebook has been tested in the field. Likewise, the tools, tips, and case studies all are derived from the practical experience of election professionals. As such, the contents of this guidebook are grounded in the realities of current election administration—a world of limited time and money, political and partisan controversy, and intense public scrutiny.

- **Maximizing Available Resources.** In seeking to tap the expertise of election officials, the authors of this guidebook relied on at least three important sources—The Election Center's Professional Practices Program, the National Association of Counties (NACo) Achievement Awards, and the EAC's "Best Practices in Election Administration."

- **NACo Survey.** The authors also relied heavily on a nationwide survey of local election officials conducted in the spring of 2006 by NACo, The Election Center, and the International Association of County Recorders, Election Officials, and Treasurers (IACREOT). The survey provided a benchmark of current practices of poll worker recruitment, training, and retention. The survey also provided important leads, guiding the authors to those election officials who are actively raising the standards for poll worker administration with new programs and approaches.

In addition to researching current and successful practices nationwide, the authors sought to gain a better, more complete understanding of the constraints on poll worker programs.

- **Focus Groups.** The League of Women Voters' Education Fund conducted focus groups across the country with election officials, poll workers, the general public, and stakeholders. The final report provided a nuanced picture of the challenges facing election officials. At the same time, the focus-group report provided an important perspective on the motivations for serving and potential strategies for reaching key audiences with effective recruitment messages.

- **Impact of State Laws.** The authors were also mindful of the complications imposed by myriad State laws governing who may serve at the polls. A compendium of State requirements compiled and verified jointly by Cleveland State University and IFES offers a framework for understanding the legal limitations in many States.

- **Outside Perspectives.** The authors worked with the EAC to appoint a working group of election practitioners, academics, and experts in adult learning, and accessibility and voting rights issues to bring important outside perspectives. The working group provided feedback on drafts at four different points in the project.

- **Extra Vetting of Particular Chapters.** The guidebook especially benefited from a series of interactive roundtables conducted on such areas as the role of adult learning in poll worker training, community organizations, accessibility issues, bilingual poll worker recruiting, college poll worker projects, and recruiting in hard-to-reach communities. The chapters on these topics benefited enormously from the insights and critiques of working group members and roundtable participants.

- **Compiling a Variety of Models.** The description of each practice and tool is based primarily on conversations and interviews with election officials about their programs. Wherever possible, the authors attempted to speak with election officials from both large and small jurisdictions. The models presented are "hybrids," merging common and universal elements from a variety of specific, individual models.

- Interviews with practitioners covered practical details, such as the amount of staff time required, the cost, and resources needed—vital information for any election official considering implementing a new program.

Providing a Framework for Evaluating Practices and Tools. The authors sought information that would help in evaluating practices and tools according to three important criteria: ability to measure, ability to sustain, and ability to replicate. In the interviews with election officials, the authors tried to gauge the political will necessary to implement the project, whether the officials had quantified the costs and benefits, and the level of risk involved.

The effort to provide a framework for evaluating the practices is limited by the fact that the survey provides a snapshot in time. The authors do not have the means to monitor change over several election cycles. Nevertheless, they believe even limited information about the ability to measure, sustain, and replicate these practices will greatly enhance the usefulness of the guidebook for individual users.

Field-Testing in Pilot Jurisdictions. In June 2006, the IFES/Pollworker Institute (PI) team selected three jurisdictions to pilot the guidebook. The jurisdictions chosen were Milwaukee, WI, Santa Fe, NM, and Hamilton County, OH. Selection criteria included at least one jurisdiction covered by Section 203 of the Voting Rights Act, at least one jurisdiction with a partisan representation requirement, and at least one jurisdiction introducing a new voting system. The participating election offices were both large and small and were geographically diverse.

Sites were asked to test the contents and usability of the guidebook and to implement practices from each of the three sections of the guidebook and track the results. Tracking the results gave the IFES/PI team objective, quantified information about the effectiveness of the practices and enabled the authors to develop and refine models for use in the guidebook. To replicate the experience of

typical election officials who will receive the guidebook without extensive personal guidance, the research team took a hands-off approach to the pilot projects.

A post-pilot survey of the practices implemented asked election officials in the pilot jurisdictions to report on the following:

- Impact on staff.

- Impact on budget.

- Management challenges.

- Sustainability.

The survey also asked election officials several questions to gauge the usability of the guidebook: Could they find practices to address specific needs? Did they browse the guidebook? Was the table of contents useful?

Snapshot of Pilot Program Successes

Milwaukee, Wisconsin
Chapter 7, Working With Government Employees. With the support of the mayor and city agencies, 320 management-level city employees were recruited as poll workers (16 percent of the total number of poll workers). They provided valuable professional assistance in polling places on Election Day. These specialty poll workers brought a high level of management and problem-solving skills to the polling place operations—and contributed to building wider public support for the election office.

Chapter 10, Offering a Split-Shift Option. When the election office offered the split-shift option, 350 poll workers chose to take advantage of the option. The election office then recruited another 350 poll workers to cover the second shift. Many of these second-shift poll workders were new recruits who otherwise might have been unwilling to serve. It appears that many of the new recruits enjoyed their experience and are now willing to serve the whole day.

Santa Fe, New Mexico
Chapter 1, Recruiting the General Public.
Santa Fe leveraged a relationship with a local reporter, who published a notice about the need for poll workers for three consecutive days. More than 200 people responded to the notice—nearly overwhelming the election office.

Chapter 1, Recruiting the General Public.
Santa Fe posted bright orange poll worker recruitment signup sheets in the polling place. Twenty precincts returned the sheets with a total of 50 names.

Hamilton County, Ohio
Chapter 1, Recruiting the General Public.
Hamilton County developed a method for tracking the source of each poll worker, both new and old. The county tracked the source of each poll worker who worked in the election.

Impact on the Guidebook

- Pilot offices requested specific models and how-to instructions. The authors searched for existing models. They also used models developed by the pilot jurisdictions in the guidebook.

- Jurisdictions appeared to be less likely to use the guidebook to plan a complete overhaul than to make incremental changes over a longer period of time. The authors changed the guidebook to include more simple and easy-to-implement changes.

Note on the Terminology and Reference to Specific Jurisdictions

The immense variety of election terms posed a challenge for the authors. Poll workers are variously called judges, booth workers, precinct officials, board workers, and, of course, poll workers. The person in charge of the polling place on Election Day can be called a precinct captain, chief judge, supervisor, or presiding judge, to name just a few. For simplicity's sake, we refer to all workers in a polling place as poll workers.

Good design makes choices clear.

References to the sizes of jurisdictions are roughly based on the following breakdown:

- Large: population of 250,000 or larger.

- Medium: population of 50,000–249,999.

- Small: population of 49,999 or smaller.

Hybrid Discussion/Specific Models.
Whenever possible, this guidebook provides composites gleaned from dozens of interviews on any practice or method, rather than from the efforts of specific jurisdictions. The many models included in the guidebook (flyers, forms, tables, etc.) are most effective when presented in their original context, with references.

Every 2 years, election officials train more than 1.4 million citizens to carry out a task critical to our democracy. On Election Day, the citizen's right to cast a vote rests not in the hands of election officials but in the hands of poll workers.

Ultimately, poll workers ensure that eligible citizens are able to cast a vote and have that vote counted. Election officials must provide the training and tools poll workers need to carry out these important tasks. How well poll workers carry out their responsibilities reflects the quality of their training and the support they receive on Election Day.

The 2002 passage of the Help America Vote Act (HAVA), the deployment of new voting systems, and the introduction of new procedures and laws have required the reinvention of most training programs. In addition, the heightened scrutiny of elections nationwide has made this training more difficult at times.

This Guidebook presents a wide variety of training methods to address different needs. No matter what method—or combination of methods—are used to keep trainees engaged, keep in mind the following suggestions:

- **Make Ttime To Develop Your Training Program.** Before developing a training curriculum, election officials need to evaluate post-election debriefing reports and error reports to determine their training needs. Deficiencies provide a focus for subsequent training.

- **Be Realistic in Deciding What To Cover.** Training experts advise focusing on three main subject areas. In practice, this may mean that introducing a new voting system will limit the other changes you can implement in that election cycle.

- **Build Evaluations Into Your Program.** Finding ways to evaluate the effectiveness of training and tools before Election Da is critical. Only by testing the understanding of poll workers can you determine whether poll workers will be ready for Election Day.

Developing a high-quality training program takes time, work, and patience. It may require several elections to determine the most effective methods for your office. The reward for this extra effort? Poll workers who will not let you down on Election Day.

In This Chapter

- Tips for Improving Poll Worker Training
- Ideas for Planning a Training Program
- Customize by Position and Experience
- Benefits
- Pitfalls and Challenges

Tips for Improving Poll Worker Training

- **Use Visual Aids.** Create poster-sized signs to reinforce the most critical information and incorporate them into the training. For example, one poster might remind poll workers to take out the memory cartridges from each voting machine at the end of the night. Another poster might remind them to make sure provisional voters sign the provisional ballot application. A third poster might remind them of where to find troubleshooting information. Consider posting actual polling place signs around the room where the training is held. Create extra-large samples of forms. Adult learning experts have found that merely by having trainees shift their gaze away from the front of the room can help them retain information.

- **Mirror Election Day in Training.** Make sure that all the materials used in training—the opening checklist, the list of voters, the paperwork, the job guides—will be exactly the same on Election Day.

- **Use Job Aids.** A job aid is a tool for reminding poll workers how to perform a specific role or task at the polling place. It should be short—no more than one page—and easy to read. For example, you might have job aids for tasks such as checking the list of voters, assisting voters whose names are not on the list, or assisting voters with ballot machines.

- **Visit Other Jurisdictions.** Visiting another jurisdiction's training session may give you new ideas. Also, as an observer, you may see problems or pitfalls that you did not notice in your own training because you were too busy conducting the training.

- **Get Feedback From Poll Workers.** Invite poll workers to provide feedback on the training program. Develop specific questions such as, "Did you feel confident in your ability to open the polls after training?" or "Did you encounter anything on Election Day that was not covered in training?" and "What can we do better?"

Ideas for Planning a Training Program

- **Review Poll Worker Performance in the Last Election.** Were certain kinds of errors common across the jurisdiction? Did you get feedback from the poll workers about their training? If not, consider sending a survey to poll workers asking for feedback on training. Identify the top three problems experienced in the last election and use them to set the priorities for subsequent training.

- **Review the Content of Your Current Training Sessions.** It may be more effective to familiarize poll workers with the manual than to take up valuable time reviewing all of it in the training session. Make a list of topics that could be deleted or abbreviated.

- **Review the List of Election Day Supplies.** Are they all necessary, or have changes in procedures or voting systems made some of them obsolete? Are they easy to find on Election Day, or is there a better way to pack them so that nothing gets lost?

- **Review the Training Manual.** Does it need to be revised to reflect changes in procedure or new equipment? Is the information clearly presented? Ask one of your newer poll workers to read the manual and identify the topics they found confusing.

- **Consider Separate Training for Experienced and New Poll Workers.** If you are not implementing major changes, it may be more effective to separate experienced and new poll workers. If you train all poll workers together, consider using more experienced poll workers to help train new poll workers.

- **Determine What Poll Workers Could Take Home to Review.** The manual? A training video? A quiz or scenarios to work through? A copy of the presentation?

- **Consider a Pay Increase for Attendance.** If you are implementing new procedures or want to conduct a more intensive training class, improving poll worker pay may increase the number and quality of people who attend.

- **Determine the Equipment and Supplies Needed.** If you are introducing new voting equipment, you will need several voting machines so that poll workers can practice using them. If the format of materials such as the provisional ballot application, the voter list, or the precinct map has changed, make sure the revised versions are available for training.

Pre-Election Troubleshooting

- *Has there been a law change? (Example: a new requirement to provide ID or a change in the number of voters in a precinct.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- *Is there a new mandatory procedure? (Example: a new format of the provisional ballot envelope.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- *Has a new voting technology been introduced? (Example: new voting machines, new electronic poll books, new scanners.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- *Has a new vendor or supply source been introduced? (Example: new ballot supplier or election supply delivery service.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- *Are there any new security procedures? (Example: new badges, new tamper tape.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- *Are there any particularly high-profile issues in the election? (Example: any current political or partisan concerns such as anticipated close races or special observers.) If so, what will the impact be, if any, on poll worker recruiting and training?*

- **Choose Qualified Poll Worker Trainers.** The best trainers often have high energy levels and dynamic personalities. Poll worker trainers must also be able to dedicate time to managing and conducting training sessions.

Customize by Position and Experience

Use Customized Training To—

- Ensure thorough coverage of topics for novice poll workers.

- Enable experienced poll workers to develop expertise in specific areas.

- Provide indepth coverage of position-specific duties, such as the electronic poll book.

- Create precinct teams of complementary skilled individuals rather than generalists.

Differences of opinion exist on the benefits and disadvantages of tailoring poll worker training to specific positions and skill levels. Jurisdictions should explore and adapt practices appropriate for their environment.

Benefits

- Organizing a training program according to poll worker positions enables trainers to go into more depth about specific procedures and forms. They can also create customized role-play scenarios. Moreover, poll workers appreciate seeing exactly what they are supposed to do on Election Day and can ask more focused questions.

- Separating new and experienced poll workers enables trainers to tailor the presentation of material to the different needs of the groups. With new poll workers, trainers can move slowly to ensure that all the basic topics are covered. With more experienced poll workers, trainers can review basic points and then devote more time to new or complicated procedures.

Pitfalls and Challenges

- Customized training according to poll worker position creates additional logistical challenges. Assignment to training classes requires more coordination than for one-size-fits-all programs, and if a poll worker assigned

Tips

- *Jurisdictions may wish to conduct general training before a primary election to ensure that everyone is familiar with all basic issues. They can change the format before the general election so that poll workers can use their recent experience to ask specific questions and participate in more focused role playing.*

- *Jurisdictions seeking to experiment with training by job position may wish to consider conducting nonspecific team training for classes leading up to a primary election so that everyone can become familiar with all the basics. In preparation for a general election, the format can be changed to training by position so that poll workers can debrief according to their recent experience, be prepared to ask focused questions, and participate in role playing.*

to a specific job does not show up on Election Day, the absence leaves a vacancy in the poll worker team's skill set.

- Classes geared by experience may lead to uneven class sizes.

- Trainers may assume that experienced poll workers have a larger knowledge base than they actually do.

In This Chapter

Managing Change at the Polling Place

An election is a complex process, and a change in any aspect of election administration affects what the poll workers do on Election Day.

Smooth transition to new systems or procedures requires communication with elected officials, politicians, voters, poll workers, community organizations, the media, the election staff, and voters.

Consider forming a steering committee made up of staff and poll workers to oversee the process. These poll workers can also serve as a focus group for testing changes in forms and procedures. Experienced poll workers can provide valuable input on what will or will not work in the polling place on Election Day. These poll workers can also serve as "change ambassadors," helping to build critical support from new poll workers later in the process.

Forms, Supplies, and Paperwork

- **Conduct a Thorough Review of All Forms That Might Be Affected by the Change.** When drafting revisions of any forms, be sure to include all relevant staff in the revision process.

- **Allow Plenty of Time To Revise Forms.** In setting a deadline for getting forms printed, remember to count back from the start of training.

- **Test the Forms.** Consider bringing in poll workers to test the usability of the forms. Have the poll workers fill out the forms and identify any problems that arise.

In planning how to administer changes in polling place operations, identify the staff and stakeholders who will be affected, including—

- *Warehouse personnel.*

- *Print shops.*

- *Election supply vendors.*

- *Trainers.*

- *Party officials.*

- *Officials responsible for nominating or appointing poll workers.*

- *Polling place contacts, such as school and church administrators.*

- *Recruiters.*

- *Poll workers.*

- **Make the Forms Self-Explanatory.** A form that is too complicated increases the likelihood of error. Poll workers are tired at the end of Election Day, and they may not have the patience to figure out calculations and complicated procedures.

Poll Worker Training Manuals

Your poll worker training manual is more than a handy tool. It is a legal document that codifies Election Day polling place rules. Revising your manual requires time and careful attention.

Revising your poll worker training manual goes hand-in-hand with revising the forms.

Training poll workers on new equipment and procedures requires revising the materials used. Review current training materials and identify those aspects of the process that will be changing and those that will not. Training materials should highlight the most important aspects of any transition.

Poll Worker Assignments

Reduce potential problems on Election Day by pairing experienced poll workers with new poll workers.

In making the transition to more sophisticated equipment, consider creating a poll worker position dedicated to resolving technical problems at the polling place. In some jurisdictions, these precinct technicians are not considered official poll workers and, therefore, are not subject to residency and age requirements.

Implementing a New Voting System

Implementing a new voting system is a huge undertaking, and there can be no mistakes. Poll workers responsible for rolling out computer voting systems typically have little or no technical expertise.

When launching a new system, everyone needs training: staff, media, candidates, campaign workers, elected officials, poll workers, and voters. A successful training program will enable everyone to understand the new systems, be confident in their ability to use them, and know how to obtain support on Election Day. In many instances, poll workers must open the polls within 1 hour of arrival, and inadequate training can result in high stress levels on Election Day morning.

Revamping and Testing Training Materials

- Draft the training materials—the election manual, the training guide, hands-on exercises, and the video script—while using an actual voting machine programmed for the election.

- Write (and possibly illustrate) simple instructions for opening and closing the machines based on the vendor-provided instructions and your own experience with the practice machine. Use direct, easy-to-understand verbs such as "Open," "Touch," and "Select."

- Test the accuracy and quality of the instructions by having staff work in teams of two, with one person reading the instructions and the other person doing the work. Time this activity to determine how long it will take on Election Day.

- Observe poll workers in a practice session as they follow the instructions for using the new equipment. If poll workers have trouble, the instructions probably need to be revised.

- Build poll workers' confidence and familiarity with the setup procedures by using the same supplies and checklists during training sessions that they will use on Election Day.

Hands-On Training

- Hands-on training classes with new equipment are critical. Make sure you have enough new systems available at training classes to allow each poll worker enough time to complete the desired function twice and to observe others completing the function. Two to six poll workers per machine is optimal. With larger groups, some people will never touch the machine, or trainers will have to make an extra effort to ensure that all poll workers engage the machine.

Election officials interviewed for this EAC guidebook stress that components of a successful poll worker training program for deploying a new voting system should include—

- *Training inhouse staff.*

- *Simple opening and closing instructions.*

- *Poll workers' hands-on training.*

- *Simple voter instructions.*

- *"Practice makes perfect" sessions.*

- *Specialized training for Election Day support staff.*

- *Election Day telephone support.*

Teams of poll workers set up a voting machine by consulting their manual and job aids, Franklin County, OH, spring 2006.

- Train people in pairs to reinforce the requirement of working in teams when opening and closing the voting machines on Election Day. Have them play both roles: one team member reads the instructions and documents the actions, while the other team member does the work.

- Self-paced, hands-on practice between the training class and Election Day is valuable. In many jurisdictions, training sessions occur 2 to 4 weeks before Election Day, which is plenty of time to forget a lot of details. Practicing before election morning allows poll workers to make mistakes, correct them, and build confidence.

Providing Election Day Technical Support

No matter how effective, thorough, and professional the poll worker training, providing a sufficient level of technical support on Election Day is critical.

Troubleshooting Materials

Make sure each precinct has an easy-to-use guide that gives step-by-step instructions for solving the most common problems. Be sure the guide provides the call center phone number. Include the troubleshooting guide in the manual, and make sure the training class includes instructions on how to find and use this section of the manual.

Call Center Support

Set up a call center at the central election office and provide every precinct with the phone number. Put the phone number in several places, including the open/close instruction sheets, the election manual, the troubleshooting guides, and the election supplies, and on stickers on the equipment.

Staff the call center with technicians who have had specialized training. Have the technicians document each call, including the time the call was received, the precinct the call came from, the name of the poll worker calling, a description of the problem, the machine serial number, the resolution, and when the call ended. Provide the call center staff with a more detailed support guide with instructions for solving problems that may arise. Be sure the machine vendor has a call center that will provide backup support for your call center staff. Be sure the call center staff knows what to do if they cannot resolve the problem, and include instructions on how to deploy a field technician/rover.

For major changes, such as voting equipment changes, create a multitiered support system that includes the following components:

- *Troubleshooting materials at the polling place.*

- *A call center staffed by technicians who can talk poll workers through problems over the phone.*

- *A staff of mobile technicians who can go to polling places to solve complex problems.*

Most calls will come in around the opening and closing of the polls, so schedule staff accordingly.

Field Technicians/Rovers

Field technicians/rovers are the third tier of Election Day support for the poll workers. They often are specially trained election office staff or government employees from county and city information technology (IT) departments. Each is assigned to help the precincts in a specific geographical area.

Make sure all field technicians/rovers keep a log of their activities, including the polling places they visit and the support they provide. By reviewing this information and debriefing after each election, election staff can decide when the poll workers have reached a confidence level when the IT support staff are no longer needed on Election Day. This usually takes several elections.

During the first election, instruct field technicians/rovers to visit each polling place in their area before the polls open. Throughout Election Day, have the field technicians/rovers circulate among the polling places, providing assistance as needed. Before the close of the polls, the field technicians/rovers should visit the locations again to ensure that the poll workers are prepared to close the voting machines.

Consider recruiting a supplemental support crew for the first election using new equipment. Partner with county and city IT employees, and assign each to provide support to two or three polling places each. Ask each to be on standby at one of the assigned polling places in the morning and at another one in the evening. Encourage the supplemental support crew to give assistance only when requested by the poll workers. The poll workers should attempt to solve problems themselves, but if they encounter difficulties with the new equipment, the IT support crew will be onsite to reinforce the correct procedures.

The Practice Makes Perfect Model

The Practice Makes Perfect model supplements hands-on training in jurisdictions that deploy new voting equipment on Election Day.

Poll worker training sessions begin as many as 6 to 8 weeks before Election Day. The Practice Makes Perfect model provides a refresher on opening, operating, and closing the new voting equipment in the week before Election Day.

Here is how it works: invite poll workers to drop in to various locations throughout the jurisdiction during the week before Election Day. During the sessions, poll workers can open a voting machine, print the zero report, process a voter, cancel a ballot, run the end-of-day results tape, and close the voting machine. Poll workers can practice at their own pace. Staff the Practice Makes Perfect sites with experienced precinct chiefs to get the poll workers started, provide help when necessary, and check the results.

Depending on the size of your jurisdiction, you may need one or many Practice Makes Perfect locations. If your jurisdiction is large, make sure locations are geographically dispersed to increase the likelihood that poll workers wil stop by and practice on their own.

Purpose and Benefits

The Practice Makes Perfect Model—

- Provides a nonthreatening, low-pressure environment for poll workers to practice using the new equipment before Election Day.

- Reinforces the poll workers' confidence level and ability to manage the equipment, ensuring a smooth startup on Election Day morning.

- Reduces the likelihood of poll worker errors on Election Day.

Resources Needed

- Reserve space, prepare materials, and train staff in advance. The precinct chiefs should be skillful communicators who are comfortable with giving instructions.

- Aside from the election office, ideal sites for Practice Makes Perfect are other government buildings such as civic centers, libraries, and city halls. County and city offices can make a substantial contribution by donating the use of their space.

- Assemble adequate supplies, ensure that the voting machines are ready for use during the Practice Makes Perfect period, and arrange for transportation of the machines to the sites.

Sample #32. Flyer Inviting Poll Workers To Attend Practice Makes Perfect Training (page 134)

Evaluation

- By tracking the visits to the Practice Makes Perfect locations, election officials can determine how many poll workers at each polling place attended a practice session. Ideally, at least one poll worker from each polling place should visit a Practice Makes Perfect location.

- Even though poll worker attendance at the Practice Makes Perfect location is voluntary, the desire to do a good job on Election Day provides the necessary incentive to participate.

- Provide the opportunity for poll workers to give feedback at each of the Practice Makes Perfect sites.

In This Chapter

Hands-On Training

This chapter illustrates several training techniques and tools that have been proven to improve adult learners' comprehension and retention of information. Use them to improve poll worker performance on Election Day.

Hands-on training is critical when teaching people how to perform any kind of mechanical procedure. Poll workers need to see how a power cord attaches to a machine, to practice pulling out the legs of a voting booth, to feel how a machine component snaps into place, to run through all the instruction screens on a voting system, and to practice replacing a roll of paper.

Hands-on training should include an introduction that provides a brief orientation to the equipment and a discussion of its advantages.

Poll workers need guidance during hands-on training. There are various methods for providing that guidance. In a centralized model, a single trainer directs small teams of no more than five poll workers as they practice each part of the process. With this model, the trainer will need a support staff to provide more detailed guidance and answer questions. Using a less centralized model, a trainer is assigned to each poll worker team to provide instruction and supervise the practice. With either model, it is critical that the poll workers, not the trainers, work with the machines.

The training should replicate the Election Day process exactly. For example, if poll workers are being trained to operate a new voting system, the training should include machine setup, printing of the opening and closing tapes, and completion of all necessary opening, midday, and closing forms.

Hands-On Training

Hands-on training is particularly effective for teaching poll workers how to—

- *Set up equipment.*
- *Open and close voting machines.*
- *Prepare voting machines for voting.*
- *Print out zero tapes and results tapes.*
- *Scan ballots.*
- *Remove memory cartridges.*
- *Use an electronic poll book.*

The hands-on training should allow time for poll workers to make mistakes and figure out for themselves how to correct or avoid them.

Hands-on training should also include a variety of scenarios that poll workers are likely to encounter on Election Day, such as voters who leave before casting their votes and power failures.

Benefits of Hands-On Training

The hands-on training model—

- Allows poll workers an opportunity to handle all of the supplies and checklists necessary to open the voting machines on Election Day.

- Supplements and reinforces the oral training and written election manual.

- Builds poll worker confidence, which may reduce the pre-Election Day dropout rate.

Resources Needed

- Hands-on training for new voting systems requires making a sufficient number of voting machines available in demonstration mode so that teams of two or three can work with a machine. The machines should be programmed so that poll workers practice using the ballots that will be used on Election Day.

- Hands-on training for new voting systems also requires a space large enough to accommodate all the teams and their machines.

- All supplies and checklists that will be used on Election Day must be incorporated into the hands-on training. For example, if poll workers are required to break seals on Election Day, they should break seals during the hands-on training.

Tips for Success

- *The hands-on training should mirror the exact procedures and supplies that poll workers will encounter on Election Day. If you plan to use job guides or "reminder sheets," make sure poll workers learn how to use those tools during the training.*

- *Do not scrimp on the number of machines or the number of trainers. Keeping the size of the poll worker teams low ensures that all poll workers will practice and become familiar with the equipment.*

A trainer and poll worker run through a HAVA "over vote" scenario at the D.C. Board of Elections and Ethics, September 2006.

Pitfalls and Challenges

- Space in the training rooms may be a problem. Consider conducting the hands-on training in the warehouse where the equipment is located, or arrange to use larger training rooms outside your facility.

- Adequate staffing is vital to the success of hands-on training. The ratio of poll workers to trainers should be no larger than 6:1. Consider using technicians or experienced poll workers as trainers.

- Hands-on training may take longer than traditional training methods. Some jurisdictions provide an added monetary bonus or incentive to attend a longer or second training session.

- Some jurisdictions may have an insufficient supply of extra voting equipment for hands-on training.

Evaluating the Training

- Establish a method for poll workers to note problems they experience on Election Day. Monitor the calls coming in on Election Day from precincts.

- If you already require poll workers to note problems on Election Day, compare the list of problems before implementing station training with the problems encountered after training.

The Perfect Polling Place Simulation

Opening a polling place on Election Day is comparable to setting up an office, orienting new employees, and welcoming customers within 1 hour. The Perfect Polling Place simulation facilitates the process by giving poll workers the chance to familiarize themselves with the layout and operation of a polling place ahead of time.

The concept of the Perfect Polling Place simulation is simple: create a polling place prototype, much like a model show room. It is much easier for poll workers to understand what needs to be done on Election Day when they can see, touch, and walk through an actual polling place as a part of their training session.

The prototype should look exactly like an Election Day polling place, including outdoor signs, interior signs, instructions, sample ballots, check-in supplies, forms, and the voting equipment.

Models for Varying Class Sizes

Jurisdictions With Small Classes

Conduct the hands-on segment of the training class at a voting unit station. The station should consist of a sufficient number of machines and all the relevant forms and materials to enable poll workers to practice all the tasks required on Election Day.

Staff the stations with trainers who can provide guidance and answer any questions.

Jurisdictions With Large Classes

Jurisdictions with large classes may limit the number of poll workers at each class session and offer multiple sessions. This reduces class size and provides more poll workers the opportunity to practice with the voting equipment.

If a large class size makes it impossible for poll workers to spend some hands-on time with the voting equipment during regular training sessions, the Practice Makes Perfect model enables poll workers to drop in at their convenience to practice operating the voting machines.

Have trainees watch experienced poll workers operate the Perfect Polling Place and have trainees perform the various tasks under their supervision.

Benefits of the Training Simulation

The Perfect Polling Place—

- Provides an opportunity for poll workers to review placement of supplies and signs and practice how they will process voters on Election Day.

- Reinforces content of the training with a demonstration.

- Reduces anxiety for new poll workers by familiarizing them with the polling place in a calm, safe environment.

Resources Needed

- Samples of all materials used at each polling place must be ready for demonstration at the training session. If multiple training events are conducted simultaneously, multiple copies of sample materials are needed.

- Space for a mock polling place at the training location should be provided.

Pitfalls and Challenges

- It is best to have space comparable to an actual polling place, but you can create an adequate substitute with free wall space and a few tables and chairs.

- For offsite training sessions, setting up a Perfect Polling Place reminds staff members of what poll workers will experience on Election Day. Consider assigning this task to tenured poll workers serving as assistants to the training staff.

Sample #33. Photo of Perfect Polling Place Room From Johnson County, KS, Digital Photo (page 135)

The Perfect Polling Place Simulation Helps Poll Workers Learn How To—

- *Set up a polling place.*

- *Post signage.*

- *Check supplies.*

- *Arrange voting machines.*

- *Promote efficient processing and flow of voters.*

A trainer at the St. Louis County, MO, Board of Elections employs a demonstration-sized version of an actual voter roster page, August 2006.

• Use poll workers and staff members to perform various roles on the Perfect Polling Place stage.

Role Playing Techniques

Role playing helps trainees learn how to—

- Check in voters.

- Ask for identification.

- Process provisional voters.

- Handle special situations, such as angry voters, lost voters, or challenges.

- Assist voters with voting machines.

- Assist voters who have disabilities.

- Prevent electioneering.

- Handle Election Day observers or poll watchers.

Role playing teaches poll workers not only administrative procedures but also appropriate interaction with voters. Develop a variety of likely scenarios and create a Perfect Polling Place as a stage for the role play. As with all training, the materials and setup for role playing should mirror what the poll workers will encounter on Election Day. If you will be using job aids or a reminder sheet, those materials should be available.

A trainer enacts a scenario with a first-time check-in clerk, D.C. Board of Elections and Ethics, November 2006.

Sample #34. Sample Role-Playing Exercises (page 136)

Sample #35. Scenarios To Enact Through Role Playing (page 137)

Benefits of Role Playing

Role playing—

- Provides a real-life Election Day experience.

- Creates a comfortable environment for poll workers to share problems they have encountered on Election Day and discuss additional problemsolving techniques.

- Reduces anxiety for new poll workers.

Resources Needed

- Develop the scenarios ahead of time. They need not be longer than a paragraph.

- Demonstrate as many scenarios as possible to provide poll workers with solutions for problems that may occur on Election Day.

Pitfalls and Challenges

The training location needs sufficient space to set up a mock polling place.

Evaluating the Role Playing

The role playing should occur toward the end of the training session and reinforce the material covered. Listen to questions that arise during the exercises to evaluate the other components of the training program.

Trainers play the roles of poll worker and voter, D.C. Board of Elections and Ethics, November 2006.

Peer-to-Peer Techniques

Experienced poll workers have a wealth of information, so make good use of them to help train their colleagues. By putting poll workers in the position of trainers, you also send an important message that you value their experience and knowledge.

Implement peer-to-peer techniques by grouping experienced and inexperienced poll workers together for role-playing and hands-on exercises or by recruiting experienced poll workers as training assistants.

Working in teams of two or in small groups, experienced and inexperienced poll workers can pool their knowledge. To incorporate experienced poll workers into the instruction more explicitly, ask them to tell stories about how they handled situations such as machine malfunctions, voter challenges, or missing ballots. Work with them in advance so you know what story they will tell and how you will make use of it. You may be able to prepare experienced poll workers to field questions on a particular topic. If you do this more than once during a training session, focus each time on a different topic and a different poll worker.

Benefits

Peer-to-peer techniques allow poll workers to—

- *Learn from each other's experiences.*

- *Practice working together as a team.*

Resources Needed

- *Divide participants into small groups and plan activities focused on specific topics of instruction.*

- *For small group training, adequate space will be needed.*

- *Allot time to divide participants into groups and have them get to know each other before beginning the activities.*

- *If you are enlisting experienced poll workers, you will need time to work with them in advance of the training.*

A poll worker, who has mobility and sight impairments, effectively leads discussions of sensitivity issues during training classes at the D.C. Board of Elections and Ethics.

Sample #36. Sample Check-in Clerk Job Guide From District of Columbia's BOEE (pages 138–139)

The following examples illustrate how to use peer-to-peer training to familiarize trainees with the poll worker manual:

- **Think-Pair-Share.** This one-on-one strategy requires course participants to use a designated portion of the election manual to solve a case study. One trainee devises a solution and shares it with a partner, who then evaluates it based on established criteria. They then reverse roles for a subsequent case study.

- **Small Groups.** Divide the participants into groups of 6 to 10. Each group member gives the rest of the group a 3-minute overview of a particular chapter of the election manual.

- **Group-to-Group.** Each group gives an overview of an election manual chapter to the other groups.

Pitfalls and Challenges

Peer-to-peer instruction needs to be carefully structured. Do not say, "Talk among yourselves," and expect that participants will get the information they need. Provide specific instructions, guidance, and learning objectives for each activity.

Evaluating Your Training Program

Administer a quiz on the training topics, including those presented through peer-to-peer methods. If most people correctly answer the questions associated with the peer-to-peer methods, assume the techniques are effective.

Interactive Techniques

The more you engage your trainees in the training process, the better. Adding an interactive component to the training program can be as simple as sprinkling questions throughout the session or as elaborate as devising a question-and-answer game with prizes. The trainer should also pose questions to the poll workers and should encourage their questions throughout the session. Asking questions will help you—

- Assess what people already know.

- Determine if participants understand the material.

- Engage the participants.

Tips for Successful Implementation

- *Be sure that your answer key is correct. One jurisdiction reported that the training class descended into chaos when the answer key contained incorrect answers.*

- *After you ask a question, allow time for the poll workers to formulate a response. If they give an incorrect answer, ask them why they came up with that answer and if anyone else can think of a reason it might be different.*

- *Poll workers should be given a copy of the questions, either before they come to class or as they begin training. Trainers note that poll workers seem to understand the questions better if they can read the words.*

Interactive Training Should Be Used To—

- *Keep poll workers engaged in the training.*

- *Reinforce key information that poll workers must know on Election Day.*

- *Help poll workers determine for themselves what they do not know.*

- *Encourage interaction among poll workers.*

- Call attention to a particularly important or complex issue.

- Stress a key point, concept, or procedure.

Questions also facilitate interaction among the trainees. After presenting a topic, give participants a few questions they can answer individually. Then ask them to compare their answers in a small group.

Consider asking trick questions to keep everyone on their toes, and inject a little humor into the training session.

Even simple games inject a lot of energy into any training session. For example, pose questions that individuals or teams compete to answer first. Or create Jeopardy-style categories from important training topics and develop five questions for each. Consider awarding prizes for each correct answer or the highest cumulative score.

Frequently Asked Questions (FAQs): Create a sheet of 10 to 20 typical questions and answers based on the training topics. Give the sheet to participants to take away from the training.

If designed correctly, the sheet of questions could serve as a job aid on Election Day.

Tips for Successful Implementation

- Encourage poll workers to ask questions throughout the training session. Telling them to hold all their questions until the end increases the likelihood that their attention will wander.

- Intersperse short content presentations of 5 to 7 minutes with periods for questions.

- Make sure you KNOW the answers to the questions you ask, and plan how to handle incorrect answers from the participants. Figure out how to handle questions that stump you, and bring knowledgeable colleagues and the election manual.

- Make questions specific. For example, ask, "What are the four conditions under which a voter should be given a provisional ballot?" rather than, "Do you understand provisional ballots?" Being more specific tells participants there is a correct answer, that incorrect answers are unacceptable, and that they will be accountable to know this information.

- Clarify how and when participants may ask questions during the training: At any time? After each short presentation? Written on index cards?

Sample Interactive Training Exercise

Engaging Your Poll Workers: 20 Questions

Posing questions to poll workers can be a fun and effective way to preview and review the most important points covered in class. By calling out responses as a group, poll workers are less likely to feel they are being tested.

Play the first 10 questions at the beginning of class. Including silly responses with the correct ones can be an engaging ice-breaker. Remind veteran poll workers that there may be some changes since the last time they served, and advise new poll workers to note the new terms that will make sense to them by the end of class.

Play the second set of 10 questions near the end of the training sessions. Consider rewording some of the first 10 questions so that you can note which poll workers got it, which ones are confused or stubbornly holding on to how it used to be, and which themes may need to be emphasized in future training sessions.

How To Prepare Your 20 Questions. Choosing the best set of questions may take a bit of time. Work with staff and veteran poll workers to identify the key issues that trainees must understand. Be sure to include questions tha relate to new procedures.

- Explain that you use questions to gauge experience and understanding, to reinforce the presentations, and to have fun.

Job Aids

On Election Day, poll workers find themselves in a fast-paced environment, often struggling to remember important information they learned weeks earlier in their training sessions.

Job aids provide a quick visual reminder of important steps and procedures. They come in various shapes and sizes—from a full-page laminated "cheat sheet" to a sticker on the outside of a voting machine or a reminder attached to the zipper pull of a supply suitcase.

Strategically placed job aids provide reassurance and save poll workers the time and stress of looking through the training manual on Election Day.

Slide Presentations

A picture is worth a thousand words—especially when you are teaching people about complicated procedures and machinery. An onscreen presentation can add this crucial visual component to poll worker training and ensure consistency across training sessions and trainers.

Consider using the following graphics to illustrate important topics:

- Layout of the polling place.

- Sample pages from the list of voters.

Tips for Successful Implementation

- *Reduce the risk of technological glitches.*

- *Practice giving the presentation using the file, computer, and digital projector that will be used for the presentation.*

- *Allow plenty of time to set up the computer and projector before the presentation.*

- *Match the projector's resolution to your laptop's resolution. Do not assume your presentation will work on another person's computer.*

- A flowchart showing the sequence of processing regular voters, voters who have moved, provisional voters, and lost voters.

- Sample forms.

- Sample pages from the road guide.

- Sample precinct map.

- Timeline of Election Day activities.

Presentation slides can include some animation, which could be very useful for demonstrating mechanical procedures or filling out forms.

In addition to providing explanatory graphics and pictures, presentation slides can reinforce important points the trainer needs to make and help poll workers learn new terminology.

Presentation slides can also be used to add an interactive component to training. The trainer can ask a question of the audience and, after the correct answer has been given, show the answer.

Resources Needed

- Presentation software.

- Laptop computer or portable memory.

- Digital projector.

- Electronic versions of all graphics.

Pitfalls and Challenges

- Creating an effective presentation requires careful planning.

- Technological glitches with the file, laptop, or digital projector can sabotage the presentation.

- Transferring photographs and other images to an electronic format can be time consuming.

Videos

Videos dramatize interpersonal aspects of working at the polls, such as assisting voters who have disabilities. After they have been produced, training videos are less expensive than poll worker manuals. They minimize inconsistencies in classroom training and ensure that all poll workers receive the same information.

Tips for Successful Implementation

- *Anticipate how the video will be used: for private viewings, face-to-face training sessions, or broadcast on local public-access cable stations.*

- *Include only procedures that are unlikely to change. A training video must be used for multiple election cycles to be cost effective.*

- *Rehearse the script before production.*

- *Circulate the script among people who don't know anything about elections to ensure the script is easy to understand.*

- *Double-check and triple-check the accuracy of the script.*

- *Cover only the essential points, not every detail.*

Videos emphasize particular topics. For instance, the North Dakota Secretary of State produced "The Right to Vote: Accessible Options" to provide sensitivity training and teach poll workers how to help disabled voters. (www.nd.gov/sos/electvote/voting/videos.html)

Resources Needed

- Videos require time to develop or write the script.

- Professionally produced videos typically require a significant outlay of money. Factors that drive up costs include—

  - Using professional actors.

  - Renting locations for shooting.

Pitfalls and Challenges

- Videos are difficult to update and can become obsolete quickly.

- Videos may be expensive to produce.

- Procurement of a production company and production itself take a long time.

Tips

- Enlist actual poll workers as actors.

- Partner with a local television personality, such as a news reporter or anchor, to serve as the narrator.

- Partner with a media communications class at a local college or university to produce the video (allow more time than with a professional production company).

- Consider pooling resources with other jurisdictions that have the same training needs.

Video Training Techniques

- Repeat each essential point at least three times in the video.

- Make the video more interactive by posing questions and reserving time to think about them or pausing for discussion.

- Include interviews with experts.

- Include interviews with poll workers to increase their familiarity with the information.

Dissemination

- Make copies available for poll workers in both VHS and DVD format.

- Make the video available on your Web site.

- Partner with a local cable station to show the video. Notify all poll workers when it will air.

- Make copies available at local libraries.

Evaluating the Video Training

If you are giving copies of the video to poll workers to watch at home, give them a post-video quiz on its content.

Online Training

Optimally, online training supplements, but does not replace, face-to-face training. Online training is conducted through a Web site that is developed in house or with a contractor. Several jurisdictions put their training manuals on line in a format that allows for easy searching. A few jurisdictions are experimenting with customized online training.

Online courses typically include techniques to maintain interest in the material, such as video clips, animation, problemsolving scenarios, pop quizzes, and a final test.

Online training can evaluate poll workers' comprehension by reporting which poll workers have started, stopped, or successfully completed the course, and which test questions were missed most frequently.

Optimally, online training supplements, but does not replace, face-to-face training.

Benefits of Online Training

Online training offers many advantages to the election administrator.

- Everyone receives the same material.

- Content can be updated easily and disseminated immediately.

- The program can track individual and aggregate participation and generate result reports.

Tips for Successful Implementation

- *Launch your online training program with an outreach campaign that brings poll workers to the Web site.*

- *Build in enough time—a minimum of 12 weeks—to develop and thoroughly test the online training program before rolling it out for use by all poll workers.*

- *If outsourcing, contract with a reputable firm that has experience with online training and dependable technology.*

- *If financial resources are limited, determine whether your jurisdiction can develop and support an online program in house. If not, partner with a local college or university technology institute, especially one that has access to adult or continuing education specialists.*

- Poll workers who register on line can receive e-mails and surveys.

- Content can be tailored for particular poll worker positions.

- The number of simultaneous users is unlimited.

For the poll worker, online training also has several benefits.

- Training is available at any time from any computer with Internet access.

- Online training is a powerful preview and review of face-to-face training.

- Poll workers can spend as much time as they like on a topic.

- Poll workers can receive immediate feedback after completing online problemsolving scenarios or quizzes.

Resources Needed

- An initial investment to develop the site, either in house or with a contractor.

- If working with a contractor, annual fees for hosting and upgrading the site.

Pitfalls and Challenges

- *Online training materials must be written for online use, not simply posted to a Web site.*

- *Many poll workers may not have access to a computer or feel comfortable using one.*

- *Online training may be modified to offer courses in multiple languages or tailored to accommodate those with disabilities.*

Evaluating Online Training

Automatically tallied test results provide information about the effectiveness of the course.

In This Chapter

- Training Agendas
- Tips for Developing a Training Manual
- Developing a Training Workbook
- Sensitivity Training
- Customized Training
- Outsourcing Your Training

Training Agendas

The previous chapter offered an array of training techniques. After you have reviewed these options, the training agenda serves as a blueprint for how all the components fit together. There is no single, "correct" poll worker training program. Accordingly, this guidebook offers several models.

Tips for developing your training agenda include the following:

- Determine the priority topics to be covered in the training session. Priority topics may be determined by changes in procedures and equipment or by problems encountered during the last election.

- Review your current training program. Did you cover information that most poll workers already knew or could just as easily have learned from reading the manual? If so, consider dropping this material from the in-person training session.

- Draft an outline of the priority topics and identify an appropriate training method for each. Be sure to focus the in-person training sessions on the most important information.

Sample #46. Exhibit A, Sample Inhouse Training Guide (page 151)

Sample #47. Exhibit B, Sample Training Agenda (page 152)

Sample #48. Exhibit C, Sample Training Agenda (page 153)

Sample #49. Exhibit D, Sample Training Agenda (pages 154–155)

Sample #50. Exhibit E, Election Center's Checklist for Training of Poll Workers (page 156)

Tips for Developing a Training Manual

When developing an election manual, think about the needs, abilities, and constraints of those who will use it. For example, if most of the users are elderly, increasing the font size can make a big difference.

This is 14 point font. This is 12 point font.
This is 10 point font.

Using a small typeface will reduce the number of pages, but it may be counterproductive if it is too difficult to read.

Design Considerations

When designing your manual, follow these simple tips from Design for Democracy, a group of design professionals who have established standards for election materials:

- Consult users about how they want to use the manual. If possible, watch them use it to learn what works and what needs to be changed.

- Reduce clutter and make the manual easy to read by leaving plenty of white space on each page.

- Use a font style and size that is easy for the users to read, such as Helvetica (the font you are reading now) or Franklin Gothic Book.

- To make information easy to find, use chapter titles, headings, and subheadings to break up the text and label chunks of information.

- To make information easy to absorb, use numbering and bullets rather than large blocks of text.

- To promote greater use of the manual, use active voice and strong verbs.

- Incorporate illustrations for information that is complex (e.g., how to set up a machine). Use flowcharts to explain processes and decisionmaking scenarios.

- Include "What If" sections to direct poll workers through specific problem scenarios.

- Organize the manual—

    - Chronologically—in the order in which the information will be needed on Election Day.

    -or-

    - According to specific task scenarios, such as processing a provisional voter.

Important Information

To emphasize important information, such as law changes or new practices, use "call-out boxes" like this one alongside the text. Exaggerate the boxes—color, weighted fonts—to attract the reader's attention.

- Create a comprehensive index and consider putting it in the front of the manual, if that is how most people will access the information.

- Choose a binding for the manual that, when opened, remains flat. Options include wire or plastic spiral binding, a three-ring binder, or a single ring in the upper-left corner, with laminated cardstock pages for covers.

- Create companion training pieces so that the manual is not your only tool for communicating information to the poll workers. In the training session, explain what the manual contains and how to use it by creating role-playing scenarios that require poll workers to find information in the manual.

- Do not expect anyone, except the editor, to read the entire manual.

- Stick to one font and distinguish chapters, section headings, and subheadings with various sizes and weights—bold, italic—of the same font.

- Get professional help if you can, particularly from—

  - A designer.

  - An editor.

  - A usability consultant.

Diagrams, Photos, and Graphics

Design for Democracy also offers the following suggestions for maximizing the effectiveness of illustrated diagrams, photographs, and graphic design elements:

- To explain voting processes, illustrated diagrams are more effective than photographs because they are clearer and less intimidating.

- Simple linedrawing illustrations can emphasize critical components and delete extraneous material.

- Scale, color, or shading can exaggerate important elements.

- Arrows and lines should depict actions and processes.

- Illustrations are better when you do not want to draw attention to gender, age, or nationality; a photograph is inevitably a photograph of someone.

- For materials that promote participation or build a sense of voting community, photographs of people having positive voting experiences are appropriate.

- Combine photographs with simple graphic design elements (e.g., stars and stripes) to create a more celebratory image.

- The ability to resize graphic design elements makes them more appropriate than photographs for large applications, such as banners. The image quality of photographs often suffers when they are enlarged.

- Digital illustrations and graphic design elements are easy to work with, modify, and store. Develop a library of illustrations that can be reused to increase consistency and decrease costs.

- Photographs are best to show certain details of a machine or document.

Developing a Training Workbook

Although manuals are good references, they do not make the best hands-on training tools. Consider creating a separate training workbook consisting of in-class exercises, quizzes, simulations, and all necessary sample forms.

At the end of the training session, ask the poll workers to write their names on their completed workbooks and leave them with the class instructor. Review the completed workbooks for accuracy, handwriting legibility, and other placement-relevant information that will help ensure that each polling place has a staff with an optimal blend of skills.

The completed workbooks can also indicate the effectiveness of the training session. For example, if most trainees complete a particular form incorrectly, this probably means that the trainer did not explain the procedure sufficiently.

Sensitivity Training

Imagine that every time you have voted, someone has looked over your shoulder, reading the ballot to you and marking it for you. Until 2006, if you were a visually impaired voter, this was how it was done. The Help America Vote Act (HAVA) of 2002 now requires that every polling place have at least one piece

Sample #51. Cover Page to St. Louis County, MO, Training Manual (page 157)

of voting equipment on which voters with special needs can vote privately and independently.

In conformance with the Voting Accessibility for the Elderly and Handicapped Act (1984) and the Americans with Disabilities Act, election officials expend considerable energy and resources selecting voting systems that are accessible to all voters. It is important then to train poll workers in how to use the equipment and to ensure that the polling place is accessible.

Election officials have found that poll workers respond well to sensitivity training and appreciate the tips offered to ensure that all voters have a positive voting experience. Some jurisdictions invite representatives from organizations such as community living centers to make presentations on assisting voters who have special needs.

Sample Page for Poll Worker Manual

Voters With Disabilities

All voters, including voters with disabilities, have the right to vote independently and in secret. It is the poll worker's job to work with voters who have disabilities to find the most suitable method to check their registration, educate them on their choices, issue them a ballot, and direct them to the appropriate voting equipment.

Treat voters with disabilities with the same courtesy you would any other voter. Below are some etiquette reminders.

- Be courteous and respectful.

- Use common sense, which will provide answers to most questions.

- Be considerate of the extra time it may take for a person who is disabled or elderly to get things done, and give un-hurried attention to a person who has difficulty speaking.

- Always speak directly to the voter and not to a companion, aide, or sign-language interpreter.

- Ask before you help. The person may not want any assistance. Do not insist—take "no" for an answer.

- On the other hand, do not be shy about offering assistance. Your courtesy will be appreciated.

- If the polling place is in a building with several routes through it, be sure sufficient signs are posted to direct a person to the most accessible way around the facility.

Voters With Speech or Hearing Impairments

- A voter who cannot speak can give his or her name and address by simply providing identification to the assisting poll worker. The poll worker then reads the name and address out loud.

- Follow the voter's cues to determine whether speaking, gestures, or writing is the most effective method of communication.

- If speaking, speak calmly, slowly, and directly to the voter. Do not shout. Your facial expressions, gestures, and body movements help in understanding. Face the voter at all times and keep your face in full light (not backlit).

- Rephrase, rather than repeat, sentences that the voter does not understand.

Voters Who Are Blind or Visually Impaired

- A voter who is blind may choose to use an assistant.

- Identify yourself and state that you are a poll worker as soon as you come in contact with the voter.

- If guiding a voter who is blind, offer your arm to the voter, rather than taking the voter's arm.

- If a person has a guide dog, walk on the opposite side of the voter from the dog. Do not pet or otherwise distract a guide dog without permission from the owner. Note: Guide dogs may be any breed or size. If you are unsure, simply ask, "Is this a service animal?"

- When giving verbal directions to help the voter navigate the polling place, be as specific as possible and identify obstacles in the path of travel.

- If you are going to leave a person who is blind, let the person know.

Voters With Limited Mobility

- Do not push or touch another person's wheelchair without their prior consent. People using adaptive equipment often consider the equipment as part of their personal space.

- Ask before helping. Grabbing someone's elbow may throw the person off balance. A person with mobility impairments might lean on a door while opening it. Quickly opening the door may cause the person to fall.

IFES trainer Dan Murphy demonstrates a voting machine.

"The great thing about bringing in outside trainers who have an election background is that they are FRESH. They are not bogged down with all the everyday challenges of election preparation. They can focus and be positive when we're managing other crises."

—Bill O'Field, D.C. Board of Elections and Ethics

- Fasten mats and throw-rugs securely or move them out of the way. A mobility-impaired person could trip over them.

- Keep floors as dry as possible on rainy or snowy days.

- Keep the ramps and wheelchair-accessible doors to the polling place unlocked and free of clutter.

Customized Training

- **Bilingual Poll Workers.** A number of jurisdictions with a large percentage of voters with limited English proficiency have found it beneficial to offer customized classes for bilingual poll workers only. Bilingual poll workers may speak English fluently, yet not be familiar with election terminology such as "roster" and "provisional ballot." They may also not be comfortable enough with their English to ask questions in front of large audiences.

  Some jurisdictions include bilingual poll workers in regular classes but recruit experienced bilingual poll workers or interpreters who can assist in clarifying terminology and in answering questions. In the training class, speak clearly— limit slang and jargon—and leave time for questions.

- **High School and College Poll Workers.** High school and college students can be valuable additions to a poll worker team. A number of jurisdictions are investing in customized training for students because students may not be familiar with the voting process and may feel more comfortable asking questions when surrounded by people their own age. Customized classes can take the form of onsite training, perhaps conducted in the context of a civics course.

- **Roving Election Day Troubleshooters.** Developing and offering extensive training for roving Election Day troubleshooters can be a valuable investment. Time spent familiarizing them with the best methods for assisting poll workers and voters can help prevent problems on Election Day. Provide troubleshooters with tips for identifying poll workers who might need extra assistance or supervision. Properly trained troubleshooters can help prevent late-opening polls.

Outsourcing Your Training

Outsourcing your training can bring new energy, perspectives, and methods into the process.

Pitfalls and Challenges

Outsourcing is more expensive than inhouse training.

Tips

- *To save money, try outsourcing a portion of your training program and compare the results with training conducted by election staff.*

- *Trainers' scope of work can include developing materials, designing forms, organizing the curriculum, reviewing and developing training tools such as presentations, and conducting the actual training.*

- *Provide contractors with existing training materials, background information, a sense of the local training culture, and expectations for the training.*

- *Hire trainers to conduct specialty classes, such as those for bilingual poll workers, students, and poll worker trainers.*

- *Trainers can be hired as individual consultants, as temporary staff, or through a college or specialized institution.*

- *Hire trainers to develop an online training program to complement the face-to-face training conducted by inhouse staff.*

- *Hire trainers to develop a video tool for quick reference use to be shared with poll workers after they have been trained.*

Outsourcing is a growing trend, because many jurisdictions do not have the time to prepare, conduct, and analyze a training program. Increasingly complicated election policies and procedures require more sophisticated training techniques to prepare poll workers for Election Day.

Benefits of Outsourcing

- Frees up staff time and energy for other priorities.

- Professional training institutions have extensive networks of trainers and can often assist in filling a training team vacancy.

- Professional trainers (adult education specialists) have expertise in current training techniques.

Evaluating Outsourced Training

- Determine if the contractor has met requirements, such as the number of workers trained, specific skills covered in training, and timeframe for completion.

- Compare the evaluation of the outsourced training program at specific times leading up to the election to that of the training program in previous election cycles.

- Compare whether poll workers trained by the outside trainer are more or less likely to attend training, serve on Election Day, or return for future elections.

Model #1. Outsourcing to a Nonprofit Election Organization. Franklin County, OH, Cook County, IL, Monterey County, CA, and Washington, DC, have outsourced some or all of their training. Professional trainers revamp poll worker programs, including updating poll worker manuals, providing feedback on procedures, and conducting poll worker training.

Model #2. Outsourcing to Community Colleges. Cuyahoga County, OH, the city of Detroit, MI, and Guilford County, NC, have worked with community colleges to train and certify poll workers. In Detroit, Wayne County Community College grants college credit to each poll worker who completes a certified program involving three 5-hour sessions.

In This Chapter

• Benefits of Evaluation

• Resources Needed

• Pitfalls and Challenges

• Training Alternatives

Evaluating your training program improves the effectiveness of your poll workers. A complete picture of the weaknesses of the training requires collecting information on poll worker comprehension and performance and analyzing that information. Every jurisdiction can easily implement one simple evaluation: an anonymous form given out at the end of the training session. The information gathered can also support budget requests for more resources to train poll workers.

In general, evaluating your training includes the following steps:

• Collect information on poll worker performance in previous elections (e.g., percent of polling places that opened late, number of voters directed to the wrong polling place, number of forms filled out incorrectly).

• Use this information to assess how much your poll workers get out of the training they are required to attend. Review the current training in light of the information collected.

• Based on the problems identified, decide what elements—content and methods—of the training to leave the same or change and what to add or take out.

• Assess poll workers' understanding both after the training and on Election Day to determine whether the training has improved since the last election.

• You do not need to collect evaluation data from everyone who participates in a training program for it to be helpful. A 10- to 25-percent response rate is typical.

Benefits of Evaluation

Evaluating poll worker training will—

• Determine whether the training is effective.

• Suggest ways to improve the program.

- Add credibility to the training program.

- Enable you to hold trainers accountable.

- Provide evidence to support requests for training resources.

Resources Needed

- **Election Day Error Reports.** You will need, for example, the log of questions that came in on Election Day from poll workers and voters. You will need to know how many forms were not filled out properly and how many polling places were not opened or closed properly.

- **"Canvass" and "Audit" Reports.** Staff will need to collect and analyze data and provide recommendations for modifying the training curriculum. It will take longer the first time as you feel your way through the process.

Pitfalls and Challenges

- The first time you evaluate the program, it will take some time, but stick with it.

- Evaluation can be a bit difficult when large numbers of poll workers give input. Consider obtaining some survey data on line to speed up collection and analysis.

Training Alternatives

- Larger jurisdictions may target their evaluation to address issues specific to particular populations (language minorities) or regions (high-mobility neighborhoods).

- Jurisdictions with limited resources should start by using the data available to them—Election Day error reports. Some jurisdictions evaluate every precinct operation and issue a "report card." Problems that come up across the jurisdiction are handled at the next training event. Precincts plagued with problems should get more support, or a new chief.

Sample #52. Kennesaw State University Center for Election Systems: Poll Worker Training Evaluation (page 158)

Tips for Successful Implementation

- *Ask other local government departments to share their evaluation expertise and resources with you.*

- *Do not evaluate things that are not directly related to the training, that you do not have control over, or that you do not have the resources to address.*

- *Do not get carried away. People earn doctorate degrees and sustain decades-long careers doing evaluation. Stay committed to making the poll workers more effective on Election Day.*

Section Two Samples

This Guidebook contains sample documents used by various State and local election jurisdictions. The U.S. Election Assistance Commission has published these documents with the express permission of its owner. These documents are intended to be representative of relevant election administration practice throughout the nation and to illustrate the concepts being described in the text. The inclusion of these samples in this Guidebook does not constitute an endorsement by the U.S. Election Assistance Commission. Additionally, as State law varies and is subject to change, readers are cautioned to obtain legal advice prior to adopting any new policy, procedure or document.

Sample #32. Flyer Inviting Poll Workers To Attend Practice Makes Perfect Training

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"PRACTICE MAKES PERFECT"
Hands-On Voting Machine Training
for Election Workers

ATTENTION ALL ELECTION WORKERS!!

For additional practice on opening and closing the touch screen voting machines, please visit one of the following locations on the dates and times listed below.

You may visit these locations as many times as necessary in order to feel comfortable opening and closing the machines on Election Day.

July 26 – 31, 2004

- **Johnson County Central Resource Library**
  9875 W 87th Street, Overland Park

July 29	11:00 – 4:30	July 31	9:00 – 4:30
July 30	11:00 – 5:00		

- **Olathe Indian Creek Branch Library**
  12990 S Black Bob Rd, Olathe

July 26, 27	11:00 – 5:00
July 29, 30 and 31st	11:00 – 5:00

- **Overland Park Community Center**
  6300 W 87th Street, Overland Park

July 26, 27 and 28th	11:00 – 7:00

- **Shawnee Library**
  13811 Johnson Dr, Shawnee

July 26	11:00 – 7:00	July 29	1:00 – 7:00
July 27	11:00 – 2:30	July 30	11:00 – 5:30
July 28	11:00 – 6:30	July 31	9:00 – 4:30

Johnson County Election Office
2101 East Kansas City Road, Olathe, KS 66061

Sample #33. Photo of Perfect Polling Place Room From Johnson County, KS, Digital Photo

Sample #34. Sample Role-Playing Exercises

Sample Role Playing Exercises

Exercise: "Using the Street Guide"
(Handouts for exercise: Sample Street Guide.)

1) Look up 4809 Hampsted Court. Is it even or odd? Odd.
   How many voters are on the farthest list of numbers to the right? 2

2) Look up 7308 Hampsted Square. Don't you need to know whether it's Hampsted Square East, North or South? Hampsted Square South.
   How many voters? 20

3) Look up 8217 Griswold Drive. How many voters? 12

Exercise: "Processing Voters"

Handouts for exercise: Sample Page from Poll Book Michelle Adams should be marked 17 years old; Barbara Andreas should be marked "AB"); Sample Page with all versions of the Voter Authority Slips; Provisional Ballot Application.

1) I am Jim Ackerman. I live at 933 Sunview Road. Let's find me. Am I a regular voter? Yes. Ask me, "What ballot do I want?" I say, "Republican." What do we do? Write Jim's ballot style on a Republican Authority to Vote Slip. Note this Authority to Vote slip number in the Poll Book and send him off to the Voting Judge.

2) I am Michelle Adams-Young. I live at 807 Sunview Road. (Please find me on the Poll Book. Do you see me?) "Oh, yes, my mom got re-married and so I've changed my name. Is that a problem?"

• Name Change: What do I have to do to let the election office about my new name? Fill out a new voter registration form in the Precinct Workbook.

• What do you notice about my voter information in the Poll Book? I am 17. Am I still a regular voter if I'm only 17? Yes. I can vote on candidates in a Primary, but not on measures.

• The Check-in Judge asks me, "What ballot do you want?" Let's say I say, "Democrat." Which Voter Authority Slip is the poll worker going to pull? The "Democrat" one.
(Remember, they'll be different colors for the actual election.)

• What is the poll worker going to note in the Poll Book? The number on my Authority to Vote Slip which is: 1005.

• What is the Check-in Judge going to write on my Voter Authority Slip?

1) Ballot style: It's 12.

2) Write a check-mark next to the 17-year-old box on the Voter Authority Slip.

3) My name is Barbara Andreas. I live at 936 Pleasant Drive. So far I'm a regular voter. What do you notice about the box where you'd normally put my ballot style? It says "AB" – what does that mean? Am I a regular voter? No. Do I get to vote? Yes, I will cast a provisional ballot. That means the Election Office will hold it until they find out what happened to my absentee ballot. Let's look at the provisional application. Please write in my ballot style at the top right corner of the form. What is the most important thing we have to ensure that the provisional voter does? (Sign the application or else their ballot won't be counted!) Do I get a Voter Authority Slip? No, the Provisional Ballot Application becomes my ticket to vote.

Sample #35. Scenarios To Enact Through Role Playing

Scenarios to Enact Through Role-Playing

Regular voter – checks in – all information is correct in the poll book – voter signs – receives correct ballot or voter card – votes – deposits ballot or returns voter card – receives "I Voted" sticker – exits polling place.

Name or address change – checks in – poll worker learns of address change – directs voter to street index clerk to look up address – voter receives provisional ballot – signs the roster – completes paperwork – receives ballot or voter card – votes – deposits ballot or returns voter card – receives information on how to determine if the ballot was counted – receives "I Voted" sticker – exits polling place.

Voter missing ID – checks in – all information is correct in the poll book, but the voter must show ID – voter does not have ID – voter receives provisional ballot – signs the roster – completes paperwork – receives ballot or voter card – votes – deposits ballot or returns voter card – receives information on how to determine if the ballot was counted – receives "I Voted" sticker – exits polling place.

Lost voter – voter arrives and checks in – name is not in the poll book – voter directed to street index clerk to look up address – voter is in the wrong polling place – clerk looks up correct polling place information and directs voter to correct polling place.

Early voter – checks in – voter wants to turn in the EARLY BALLOT and vote on voting machine – voter receives provisional ballot – signs the roster – completes paperwork – receives ballot or voter card – votes – deposits ballot or returns voter card – receives information on how to determine if the ballot was counted – receives "I Voted" sticker – exits polling place.

Regular voter – Needs assistance – checks in – all information is correct in the poll book – voter signs – receives correct ballot or voter card – voter begins to vote; however, asks for assistance – 2 poll workers must assist the voter – voter cast ballot – deposits ballot and/or returns voter card – receives "I Voted sticker" – exits polling place.

Regular voter – Campaign shirt – checks in – voter is wearing campaign information – poll worker asks voter to remove or cover campaign button/shirt, etc. – voter signs – receives correct ballot or voter card – votes – deposits ballot or returns voter card – receives "I Voted" sticker – exits polling place.

Late voter – voter arrives or is in line after polls close at 7:00 p.m.

Sample #36. Sample Check-in Clerk Job Guide From District of Columbia's BOEE

CHECK-IN CLERK JOB GUIDE
GENERAL ELECTION
Washington, DC Board of Elections and Ethics

JOB: Hang signs, complete notations using the Challenged and Absentee Voters Lists in Master Index, and process voters

MONDAY BEFORE THE ELECTION
TASK: Prepare Master Index for processing voters on Election Day
1. Set up your station
2. Attach alpha tabs to Master Index
3. Locate Absentee Voters List
4. Identify Absentee Voters in the Master Index from Absentee Voters List
5. Print "Absentee Voter" in Master Index next to voters' names
6. Obtain Administrative Challenged Voters List from Precinct Captain
7. Print "Challenged" next to voters' names in Master Index
8. Give List back to Captain

ELECTION DAY – OPENING THE POLLING PLACE
TASK: Ensure the Check-In station is set up and assist the Precinct Captain

PROCESSING VOTERS
TASK: Verify voter eligibility by using Master Index
1. Greet voter
2. Ask voter's name
3. Locate name in Master Index
4. Read aloud the voter's name, address, and party affiliation to confirm they are in the correct precinct and so the Poll Watchers can hear it
5. Write an "X" at right corner of signature box
6. Ask voter to sign name next to the "X"
7. Ensure voter signed in correct place
8. Give voter proper Advisory Neighborhood Commission/Single Member District (ANC/SMD) Voter Card
9. Ask voter to print their name on the Voter Card
10. Tell voter to give the Voter Card to the Ballot Clerk
11. Direct voter to Voting Demonstration Clerk if they have any questions about voting machines

AFTER THE POLLING PLACE CLOSES
TASK: Secure Master Index and give it to the Precinct Captain
1. Gather all volumes of the Master Index
2. Put rubber bands around them
3. Give them to the Precinct Captain

SPECIAL INSTRUCTIONS

CHALLENGE BY AN AUTHORIZED POLL WATCHER
1. Notify the Precinct Captain because he or she is responsible for processing challenges in the polling place
2. The Precinct Captain can also challenge a voter

ABSENTEE BALLOT BROUGHT TO THE POLLING PLACE
If a voter brings an Absentee Ballot to the polling place, tell the person to vote the Absentee Ballot, place the ballot inside the Secrecy Envelope, put tat envelope in the Absentee Ballot Envelope, and put it into the Special Ballot Box

SEE BACK SIDE

Sample #36. Sample Check-in Clerk Job Guide From District of Columbia's BOEE (page 2)

CHECK-IN CLERK JOB GUIDE
GENERAL ELECTION
PAGE 2

ID REQUIRED

1. Locate voter's name in Master Index and if "ID REQUIRED" appears next to the name, ask for the following ID:
   - *Current photo ID*
   - *Utility Bill*
   - *Bank Statement*
   - *Government Check*
   - *Pay Check*
   - *Any other current government document with voter's name and address (a photo is not required)*
2. Verify the voter's Advisory Neighborhood Commission/Single Member District (ANC/SMD)
3. Write an "X" at right corner of signature box
4. Ask the voter to sign name using the Signature Guide next to the "X"
5. Ensure the voter signed in correct place
6. Give the voter the proper ANC/SMD Voter Card
7. Ask the voter to print his or her name on the Voter Card
8. Direct the voter to the Ballot Clerk

VOTERS WITHOUT PROPER ID

1. Fill out a Special Ballot Referral Form
2. Direct the voter to the Special Ballot Clerk

SPECIAL BALLOT REFERRAL FORM WILL BE USED WHEN

1. When ID is required, but not provided
2. Voter wants an "Election Day Change of Address"
3. Name not listed on the "Master Index"
4. Voter listed as an "Absentee Voter"
5. An "Administrative Challenge" has been generated by the Board
6. Voter is "Challenged" by a Poll Watcher or the Precinct Captain
7. Voter is an elderly person or a voter with a disability and voting outside of precinct
8. Voter is an Election Worker
9. Voter has a different party registration
10. Voter has a different ANC/SMD

SUPPLIES

Absentee and Challenged Voters List
Alpha Signs
Alpha Sign Holders
Binder Clips (small and medium size for Alpha Sign Holders)
Check-In Clerk Sign
18" Ruler
Index Tabs
Job Guide
Magnifying Glasses
Master Index Books
Push Pins for Alpha Signs
Special Ballot Referral Forms
Warning Sign (stand up)

Sample #37. 20 Questions—Set One

"Twenty Questions"
(Sample Courtesy of the DC Board of Elections and Ethics)

Use this old game of "20 questions" to review the key points you picked up at training class. Below are the 20 questions for your review:

**SET ONE
(First 10 questions)**

1. Are all registered voters eligible to vote in the November Presidential Election? (Circle One)
   - Yes   No

2. What does the Check-in Clerk do if a voter's name and address are not in the Master Index? (Select one)
   - a. Tell the voter to go home
   - b. Refer Voter to the Special Ballot Clerk to verify in the Master Street Index if the Voter is in the correct precinct

3. What can the Special Ballot Clerk and the Ballot Box Clerk do to ensure that a Special Ballot "Provisional" Voter does NOT accidentally cast his or her Special Ballot in the Optical Scan Reader? (Circle all that apply)
   - a. Ballot Box Clerks should keep an eye out for voters carrying envelopes
   - b. Ballot Box Clerks should put a sign marked "Special Ballot Votes not Welcome" on top of the optical scan counter
   - c. Special Ballot Clerks should ensure that Special Ballot voters mark their ballot in the area near the Special Ballot Clerk and place the voted ballot immediately in the Secrecy Envelope and the Special Ballot envelope provided

4. If a registered voter who is NOT in the correct precinct casts a Special Ballot will it be counted? (Select One)
   - a. Yes
   - b. No
   - c. No, EXCEPT for voters with disabilities, elderly voters and poll workers working out-of-precinct

5. Is identification required for all voters?
   - a. Yes
   - b. No
   - c. No, only for voters identified in the Master Index as "ID Required"

6. Voter One has signed the Master Index on the line that is for Voter Two's signature. What should the Check-in Clerk do? (Circle all that apply)
   - a. Instruct Voter One to sign on the correct line and issue a regular ballot to Voter One, requiring Voter Two to vote a Special Ballot
   - b. Instruct Voter Two to scribble out Voter One's name and sign above it
   - c. Get out some white-out and fix it
   - d. Check-in Clerk should check "Other" on the Special Ballot Referral Form and writes "Previous voter signed on wrong line"

Sample #37. 20 Questions—Set One (page 2)

"Twenty Questions" Set One Continued

7. Which of the following are the responsibilities of the Special Ballot Clerk? (Circle all that apply)
    a. Check voter addresses in the Master Street Index
    b. Check Voter's Special Ballot Referral Form for reason for referral
    c. Direct Voter, if in a wrong precinct, to correct precinct where their vote
        will be counted
    d. Give the Voter a Special Ballot Envelope and instruct Voter on how to
        complete all parts of the form
    e. Ensure that Special Ballot Voters receive a ballot stamped "Special"
    f. Compete Election Worker's Certification Box on the Special Ballot Envelope
    g. Tell Voter you will be happy to go get a regular ballot for them from
        the Ballot Clerk

8. Which of the following are the responsibilities of the Ballot Clerk: (Circle all that apply)
    a. Tell the voters which ballot they should choose
    b. Account for all paper ballots
    c. Place voter cards into the appropriate cardboard box ("Touch Screen" or "Optical Scan")
    d. Call out name of voter two times for poll watchers

9. Who is responsible for processing a "Spoiled Ballot"?
    a. Special Ballot Clerk
    b. Ballot Clerk

10. Who is responsible for processing a curbside voter? (Circle at that apply)
    a. Ballot Box Clerk
    b. Voting Demonstration Clerk
    c. Precinct Captain

Set One Answer Key: (1) Yes (2) A (3) A, C (4) C (5) C (6) A, D (7) All except G (8) B, C, D
    (9) B (10) B, C

Sample #38. 20 Questions—Set Two

<div style="border:1px solid black;">

"Twenty Questions" Set Two

(Second 10 questions)

1. Why does the phrase "The Voting Never Stops" apply to elections conducted in Washington, DC?
   - a. Voters can vote as many times as they want to on Election Day
   - b. In the unlikely possibility that both the touchscreen unit and the optical scan reader are not working, voters may still vote on paper ballots. Voters mark their ballots as usual and voted ballots are stored in a secure bin within the optical scan counter until the units are again functioning

2. Can a poll watcher or precinct captain challenge a voter on Election Day?
   - a. Yes
   - b. No

3. Can a voter who requested an absentee ballot, but never received it in the mail, vote in their precinct on Election Day?
   - a. Yes
   - b. No

4. Can a poll worker, who has not voted when he or she is reassigned to another precinct the night before Election Day, vote in the precinct they just got assigned to, even if it is not their precinct of residence?
   - a. Yes, vote a regular ballot
   - b. Yes, vote a Special Ballot
   - c. No

5. Can a voter do a "write-in candidate" on the Optical Scan and on the Touch Screen voting systems?
   - a. Yes
   - b. No

6. What should be done if a voter wants to cast a blank ballot?
   - a. Nothing because a voter has a right to vote the ballot as desired
   - b. Tell voter they have wasted their ballot and can't have another one

7. What should be done is a voter leaves the Touch Screen voting booth before selecting "Cast Ballot"? (Circle all that apply)
   - a. Cancel the vote
   - b. Finish voting for the voter
   - c. Ballot Clerk or Precinct Technician should tell the Precinct Captain
   - d. Only the Precinct Captain can remedy the situation

</div>

Sample #38. 20 Questions—Set Two (page 2)

"Twenty Questions" Set Two Continued

8. How many paper ballots can a voter spoil? (Select one or more)
　　a. A voter is not limited to the number of ballot they can spoil
　　b. If a voter spoils more than two ballots, ask them if they would like a demonstration
　　c. Only one paper ballot

9. How should a voter with disabilities be treated? (Select more than one)
　　a. With respect and dignity
　　b. Be considerate of extra time it may take and never hurry the voter
　　c. Always speak directly to the voter and not the companion, aide, or sign language interpreter
　　d. If voter is visually impaired, play with the dog while the voter votes
　　e. Ask before you help and do not insist on helping

10. In case of emergency, what should you do? (Select all that apply)
　　a. Precinct captain should take special ballot box, paper ballots, voter cards, master index books and assign each poll worker a duty
　　b. Notify BOEE of emergency
　　c. Poll workers should direct voters and poll watchers to the nearest exit
　　d. Run out of the voting precinct and go home
　　e. Precinct Technician should record public counter numbers on each machine and note the time of day
　　f. Call 911 first
　　g. Read your manual's emergency procedures prior to Election Day

Set Two Answer Key: (1) B (2) Yes (3) Yes (4) B (5) Yes (6) A (7) A and C (8) A and B (9) A, B, C, E (10) All but D

Sample #39. Job Aid A
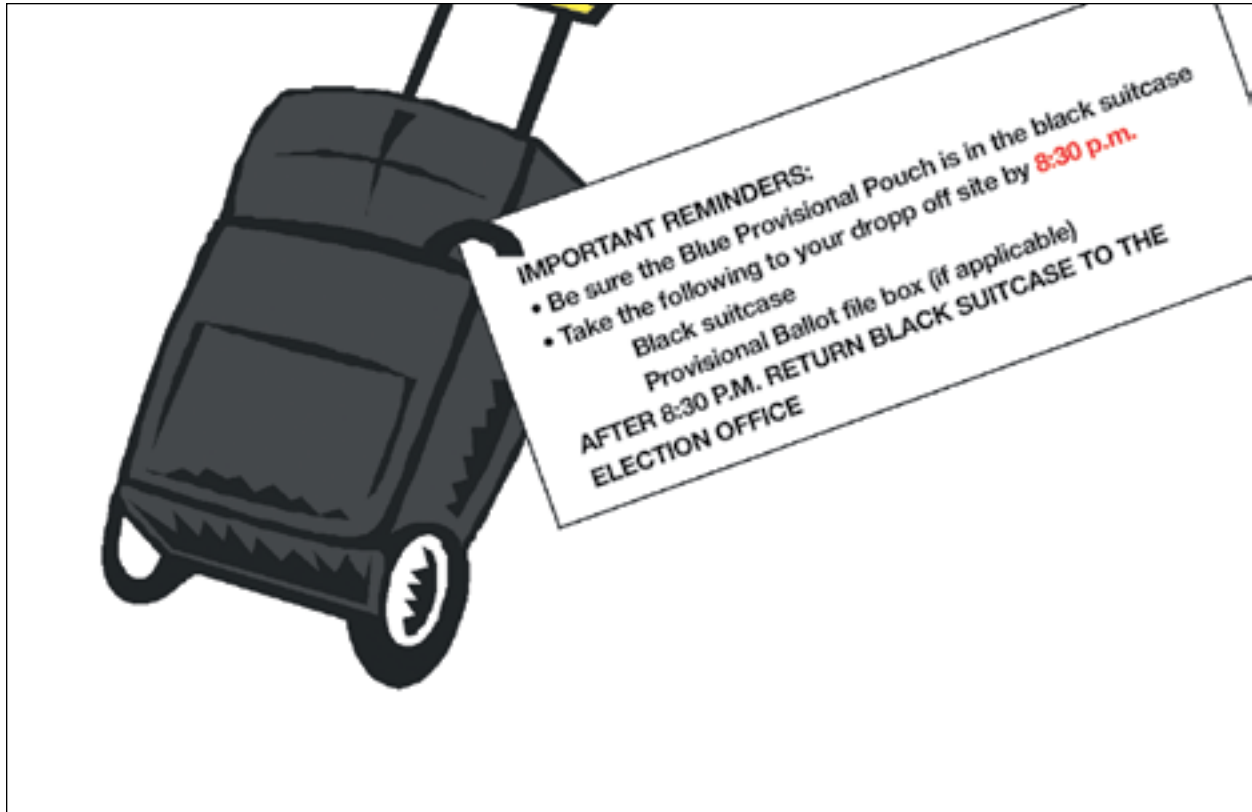
A laminated card attached to the zipper pull of the supply suitcase reminds poll workers what to pack in the suitcase and return to the office on Election Night.

Sample #40. Job Aid B
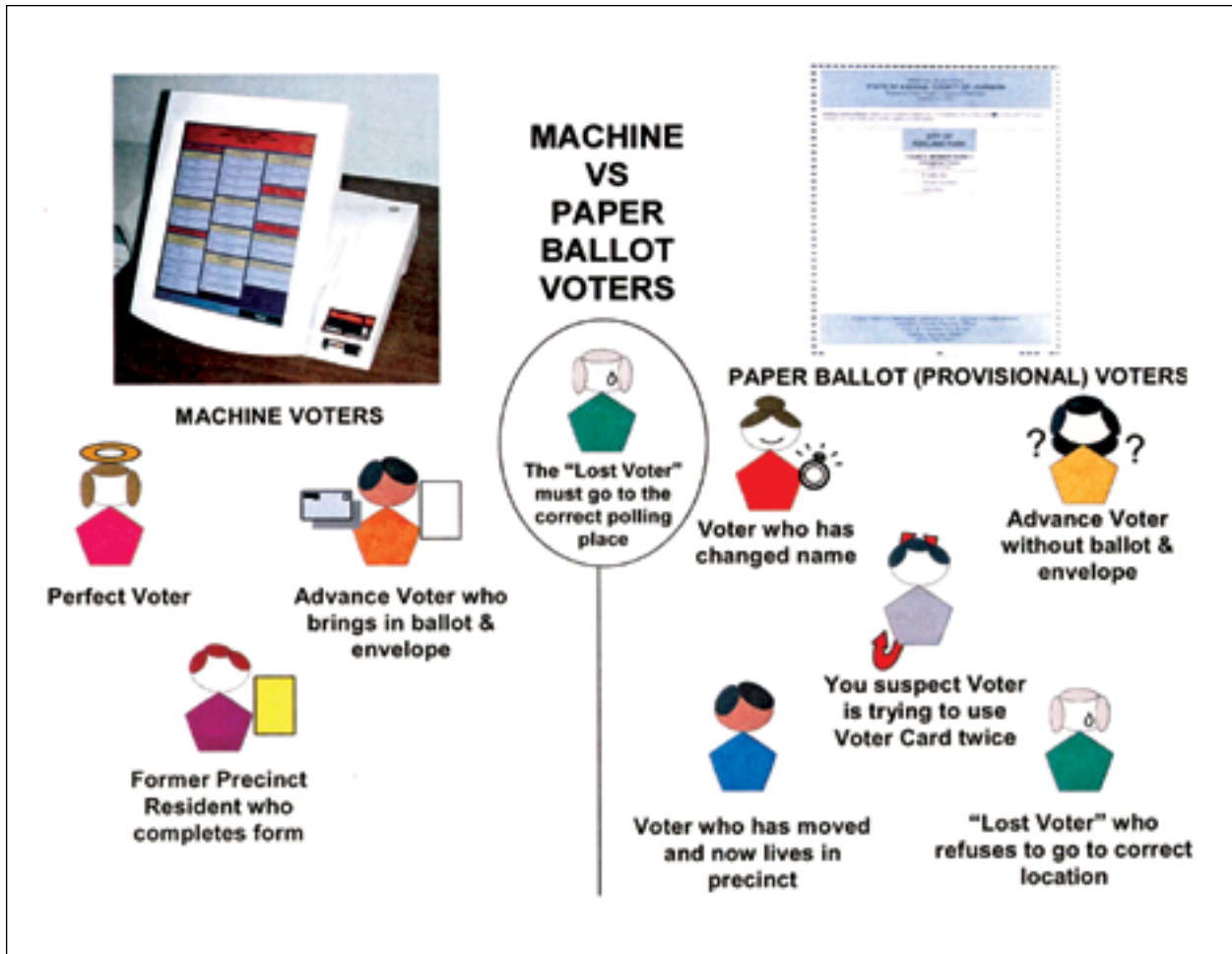
A laminated job guide located near the check-in table provides a quick reference for determining voter eligibility.

Sample #41. Training Workshop Sample Slide Presentation: Imaginary County

Slide Presentation

Imaginary County
Basic Poll worker Training Workshop
Slide Presentation

Slide Number	Title
Slide 1	Welcome
Slide 2	Opening Activity
Slide 3	Opening Activity – Objectives of the workshop
Slide 4	Before Election Day
Slide 5	Before Election Day
Slide 6	Opening the Polls
Slide 7	Opening the Polls
Slide 8	Troubleshooting Scenario #1 and Solution
Slide 9	Troubleshooting Scenario #2 and Solution
Slide 10	Processing Voters
Slide 11	Processing Voters
Slide 12	Processing Voters
Slide 13	Processing Voters
Slide 14	Processing Voters
Slide 15	Processing Voters
Slide 16	Troubleshooting Scenario #3 and Solution
Slide 17	Closing the Polls
Slide 18	Closing the Polls
Slide 19	Returning Supplies
Slide 20	Troubleshooting Scenario #4 and Solution
Slide 21	Troubleshooting Scenario #5 and Solution
Slide 22	Troubleshooting Scenario #6 and Solution
Slide 23	Assessment – Are you ready?
Slide 24	Evaluation – How did we do today?

Sample #42. Training Workshop Sample Slide Presentation: Basic Training
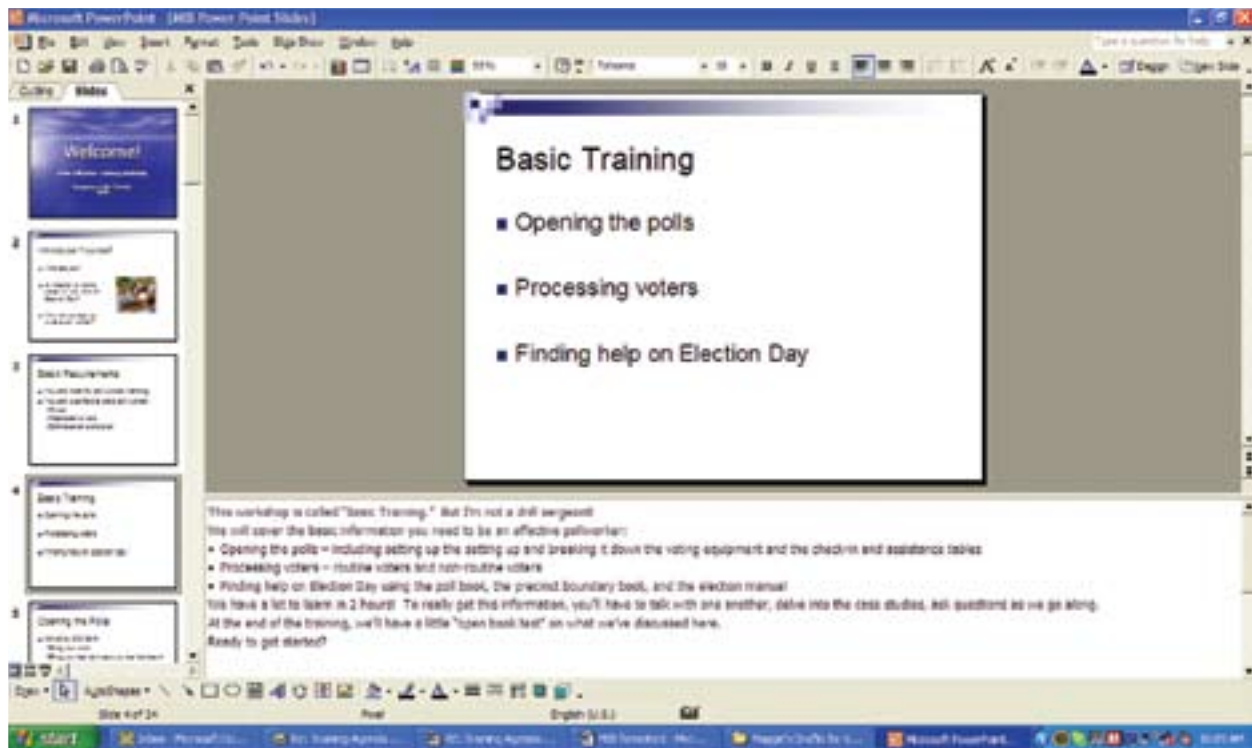
This is the third slide in the presentation. This is what the presenter will see on her computer. (Participants will only see the slide.) Notice the detailed talking points in the notes section at the bottom of the screen. Using the notes section helps ensure consistency in your presentations.

Sample #43. Training Workshop Sample Slide Presentation: Case Study

This is slide 20 in the presentation. Again, see the notes in the bottom of the screen. These notes guide the presenter to engage the participants in conversation about the case study, rather than just giving them the solution.

Sample #44. Model 1 Training Program

Model #1: Texas Online Poll Worker Training Program:
http://www.sos.state.tx.us/elections/onlinepoll worker.shtml

On Line Poll Worker Training is here!

Election Officials and Poll Workers (Election Judges and Clerks):

The Texas Online Poll Worker Training is here! **Texas is the first state in the nation to introduce On Line Poll Worker Training on a statewide basis!** County Clerks and Elections Administrators simply log onto the system, begin entering e-mail addresses of your Election Judges and Clerks for the upcoming November 7th General Election, select from a drop down menu to send them e-mail, and you can even print reports for your records!

What are the benefits?

This is a brand-new way to train Election Judges and Clerks all over the State—it's easy, convenient, and most of all, free!
Providing on line poll worker training will allow you to:

- Conduct large training easily—just think, no room arrangements, seating problems, parking problems—your users can take the training course in the comfort of their home if they like;

- Provide training at the Judges and Clerks convenience;

- Provide Training 24 hours a day/ 7 days a week;

- Gather response data from your Judges and Clerks by printing out a report that will tell you exactly what topic(s) you need to go over in face-to-face training when they come to pick up their election supplies;

- Cut down on time and travel to face-to-face training;

- Reward your election judges and clerks by providing them with a Certificate of Achievement.

We at the Secretary of State's office are excited to bring you this new method of training and look forward to working with you and your Judges and Clerks.

Poll Workers: if you haven't been contacted by your County Clerk or Elections Administrator about this new training, give them a call and ask them to get you signed up!

County Clerks/Elections Administrators: if you haven't offered this to your poll workers, sign them up!   There's even a built-in help "desk" in our online training (upper right hand corner of the screen), as well as a FAQ.

> For technical support issues, please feel free to call our special toll-free number at 888.826.4858 or e-mail us with your questions and comments.

Questions: Call or e-mail Kim (Sutton) Kizer at 800.252.VOTE(8683). Thank you and Happy Web Learning!

Sample #45. Model 2 Training Program

Model #2: Hillsborough County Online Poll worker Training Program:
http://hillsborough-fl.training.clarityelections.com

Welcome to our Online Training Center

Thank you for joining our Election Team and for your commitment to serve your community during election time. We are proud to have you on board and are pleased to provide you this state-of-the-art online training program to teach you all of the essentials required to open, run and manage your precinct's polling place during election time.

If you are a new user, please refer to your welcome letter for the **user name** and **password** required to access the Online Training Center to begin your training. To help you get started, please click Quick Start Guide for detailed help on using the Online Training. Please click System Requirements to learn how to best view this online training material within the platform.

To begin the training:

1. Type your **User Name** in the **Name** field

2. Type your **Password** in the **Password** field

3. Click **Login** to load your personal training page

4. From there, just click the **Introduction** link, located in the **Current Courses** section to begin the training

I am eager to hear how you like the online election worker training. Please feel free to email or call my office with your feedback.

See you at the polls!

Buddy Johnson
HILLSBOROUGH COUNTY SUPERVISOR OF ELECTIONS

Login Questions?
Show Me

Sample #46. Exhibit A, Sample Inhouse Training Guide

Exhibit A
SAMPLE IN-HOUSE TRAINING GUIDE

Training Methods Used: Hands-on Training and In-Class Exercises

12:30   Have refreshments ready. Collect signed pollworker materials (sign-in sheets, loyalty oaths, etc.)

1:00   Opening – Welcome workers, reiterate their role in Democracy

1:15   Review successes and problems encountered during the last election cycle

1:30   Review law changes and any special issues for this election

          Break out sessions:
          Station 1 – forms and provisional ballots;
          Station 2 – supplies and special issues;
          Station 3 – equipment operations/hands on

2:00   Move to first session – follow signs (signs show which precincts begin at which station – then they go clockwise)

2:35   Dismiss to move and get refreshments

2:45   Groups rotate to next station; next session begins

3:20   Dismiss to move and get refreshments

3:30   Groups rotate to next station; next session begins

4:10   Supervising Judges pick up supplies in Clerk's Office

Remind lead pollworker to check with their polling site to make sure it will be open at 6:30 a.m. on Tuesday. They have the contact information in their notebook.

Sample #47. Exhibit B, Sample Training Agenda

Exhibit B
SAMPLE TRAINING AGENDA

I.   **Welcome**
    a. What's New? (curbside voting door bell for accessibility, ability to cast provisional ballots on touchscreen unit, new security procedure)

II.   **Expectation of the training class**
    a. Class will be 2 hours plus 30 minutes for hands-on
    b. Housekeeping (cell phones, hand-outs, etc.)
    c. Importance of consistency

III. **"Twenty Questions" Game (1st set of 10 questions)**

IV.   **Overview of "Perfect Polling Place"**

V.   **Overview of Job Descriptions**
    a. Precinct Captain
    b. Voter Demonstration Clerk
    c. Check-in Clerk
    d. Ballot Clerk
    e. Ballot Box Clerk
    f. Special Ballot Clerk
    g. Precinct Technician

VI.   **Opening Procedures**

VII. **Processing Voters (Role Playing)**
    a. "Perfect Voter" (check-in and vote)
    b. Voter not found in Roster
    c. Provisional Voter
    d. Voter marked "Absentee Ballot Requested" in Roster

VIII. **Closing Procedures**

IX.   **"Twenty Questions" Game (2nd set of 10 questions)**

X.   **Hands-on exercises with voting equipment (Set up, Opening, Processing a voter, Closing, Tear-down)**

> **Tip!**
> Post the Training Agenda on a large easel or Post-It at the front of the room. It will keep you – and your audience – focused!

Sample #48. Exhibit C, Sample Training Agenda

Exhibit C
SAMPLE TRAINING AGENDA

Training Methods Used: In-Class Exercises, Interactive Training,
Overhead Presentation

Time	Who	Topic	Facilitation	Methods/ Media
5 Minutes	Presenters and Participants	Welcome	Introductions of presenter and elections staff	Show Slides 1 -2
10 Minutes	Presenter 1	Opening Activity	Review the objectives of the training	Show slides 3-4
5 minutes	Presenter 2	Content	Opening the Polls	Show slides 5-7
10 minutes	Presenter 1	Demon-stration	Set up the voting equipment	Voting equipment
20 minutes	Participants Presenter 2	Scenarios 1-2	Have participants break into groups of 6 to read and solve the scenarios Have one group share their solution to each of the 2 scenarios	Scenarios 1 – 2 Slides 8 – 9
15 minutes	Presenter 1	Content	Processing Voters	Show slides 10-19
30 minutes	Participants Presenter 2	Scenarios 3-5	Have each group of 6 resolve each of the scenarios Announce the solutions to the case studies; check for agreement and alternatives.	Scenarios 3 – 5 Slides 20-22
15 minutes	Participants	Assessment	Have each participant complete the evaluation independently. Review the answers. Provide take-home copies	Assessment Slide 23
10 minutes	Presenters	Evaluation	Refer participants to FAQ for instructions on getting Election Day assignments. Distribute evaluations.	Evaluation FAQ Slide 24

Sample #49. Exhibit D, Sample Training Agenda

Exhibit D
SAMPLE TRAINING AGENDA

I.   Training Workshop Title:

Basic Poll Worker Training Workshop

II.   Workshop Objectives

All Imaginary Lake County poll workers should learn how to:

- Set up, operate, and break down the voting equipment
- Process voters
- Find help on Election Day

III.   Workshop Preparation

Component	Purpose	Description
Method of Delivery	The training workshop is best presented in 2 hours to groups of 18, 24, 30, or 36 participants	Options: • Morning session • Afternoon session • Evening session
Presenter	This workshop is best presented by a team of 2 presenters	Options: • Elections staff or leadership • Poll worker peer • Subject area expert
Invitation/ Announcement	ROV will send invitations and register the prospective poll workers for the training sessions	Options: • Email or snail mail • When and where • Why they are attending the training • Info on training bonus if appropriate

IV.   Workshop Setting

- Location/Duration:
  - Oliver Street Library, Community Room # 2, 7:00 a.m. – 9:00 a.m., Thursday, September 7, 2006
  - Site Contact: Linda Jones, Head Librarian, xxx-xxx-xxx

- Maximum No. of Participants:
  - 18 participants may register for this training session
  - Get the class list from ROV on Tuesday, September 5, 2006, xxx-xxx-xxxx

Sample #49. Exhibit D, Sample Training Agenda (page 2)

- Room set-up:
  - Arrange tables in a "U" in the center of the room w/ the open end toward the screen
  - Set up the projector/computer facing the screen
  - Set up the voting equipment in one corner of the room
  - Place the Case Study Sets on another table

- Adaptation for More Participants:
  - Expand the number of participants by multiples of 6
  - Arrange the room so folks are seated in groups of 6 from the beginning
  - Have one piece of voting equipment for every 4 groups
  - Have a Case Study Set for every 3 groups (have them share)
  - Have one facilitator (staff member or additional trainer) for every 4 groups

V.   Workshop Handouts

Bring one for each participant except where noted:
- Basic Poll Worker Training Workshop Frequently-Asked-Questions (called FAQ)
- Basic Poll Worker Training Workshop Case Studies # 1 -5
- Voting Equipment Job Aid (copy of laminated sheet that will be at polling place)
- Basic Poll Worker Assessment (bring 2x the number of participants)
- Basic Poll Worker Training Workshop Evaluation

VI.   Workshop Materials

- Laptop computer, projector, screen
- Voting Equipment (for demonstration and solving case study 1 and 2)
- Case Study Set (one set for every 6 participants):
  - "Dummy" Poll Book (for solving case study 3)
  - Precinct Boundary Book (for solving case study 4)
  - Election Manual (for solving case study 5)

Sample #50. Exhibit E, Election Center's Checklist for Training of Poll Workers

ELECTION CENTER

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12543 Westella, Suite 100, Houston, TX 77077, 281-293-0101

Checklist for Training of Poll Workers

BEFORE TRAINING BEGINS:		
Training site and room reserved, unlocked, and available on day of training? (did you check prior to training, even if room had been reserved?)	☐ YES	☐ NO
At time of invitation, do you ask learners if they have any special needs accommodations?	☐ YES	☐ NO
Is training time sufficient to teach the required material and allow for lots of repetition and practice, practice, practice?	☐ YES	☐ NO
Have you posted signs to direct learners to the training room?	☐ YES	☐ NO
Is the training site and room accessible for persons with disabilities?	☐ YES	☐ NO
If accessibility entrance is at a different location in building, do you provide directions from THAT entrance to the training room?	☐ YES	☐ NO
Is there ID or special badge requirements in order to enter the building?	☐ YES	☐ NO
Do you need a microphone?	☐ YES	☐ NO
Are there adequate chairs, lighting?	☐ YES	☐ NO
Is room set up so all can clearly see monitor, screen, trainer?	☐ YES	☐ NO
Do you need a projection screen?	☐ YES	☐ NO
Audio/visual tested and ready to be used? (back-up projector(s), spare bulbs, etc)	☐ YES	☐ NO
Do you consider having an objective 3rd party (teacher, college instructor) observe the training and report feedback to trainer after session?	☐ YES	☐ NO
Do you have enough training manuals, hand outs, checklists, and are they in order?	☐ YES	☐ NO
Do you have sign-in sheets or attendance rosters?	☐ YES	☐ NO
Do you have name tags for all attendees?	☐ YES	☐ NO
Do you have extra pens/pencils available?	☐ YES	☐ NO
Does your training manual have an index, tabs or table of contents for poll workers to easily locate specific topics?	☐ YES	☐ NO
Are power outlets accessible for audio/visual?	☐ YES	☐ NO
Are you organized and comfortable with the material to be presented?	☐ YES	☐ NO

Sample #51. Cover Page to St. Louis County, MO, Training Manual

Saint Louis COUNTY ELECTION BOARD
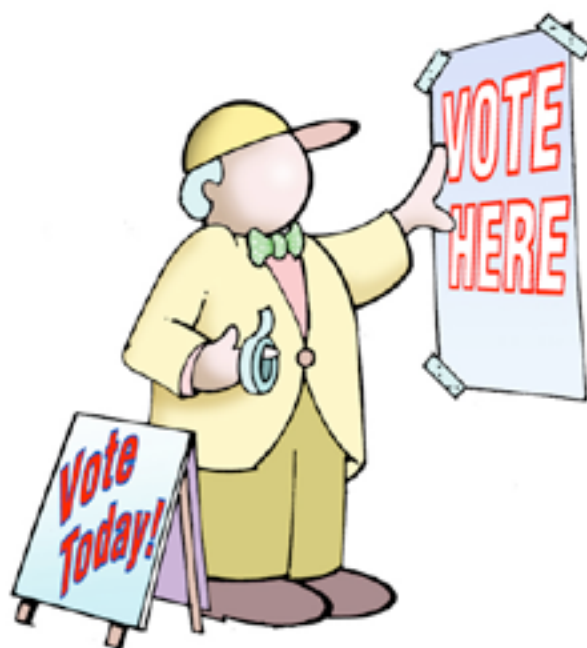
INSTRUCTIONS FOR ELECTION POLL WORKERS

for the Aug. 8, 2006 Primary Election

Sample #52. Kennesaw State University Center for Election Systems: Poll Worker Training Evaluation

Look for patterns in errors on the quizzes. To better see the patterns, transform it from a bunch of answer sheets into a chart that associates questions with objectives and tallies the number of correct and incorrect responses.   Your chart might look like this:

Sample Poll Worker Performance Chart				
Course	Basic Pollworker Training			
Session	October 13, 7:00 p.m., Main Library			
Instructor	B. Wise		o New o Experienced	
Instructor Preparation	o Given Training-In-A-Box Materials date: _____ o Attended Training-In-A-Box Meeting date: _____ o Attended Train-the-Trainer Session, date: _____ o Passed the Trainers Prep Test, date: _____ o None			
Participants	60			
Evaluation Tool				
Objective #	Question #	# Correct	# Incorrect	
1	1			
1	2			
1	3			
1	4			
1	5			
2	6			
2	7			
2	8			
2	9			
2	10			
3	11			
3	12			
3	13			
3	14			
4	15			
4	16			
4	17			
5	18			
5	19			
5	20			
Notes:				

If a one question is missed frequently look at how thoroughly that topic was treated in the training. Consider increasing the pollworkers' exposure to the topic, for example, the instructor may use a power point presentation to directly teach the concept then have the participants solve a case study using the information finally participants might play a "Jeopardy" style game that includes a