PARAQUAD Research Alliance for Accessible Voting

RAAV Poll Worker Training Project

May 2011

through

May 2014

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Training Poll Workers on Disability, Accessibility, and Accommodations

About Paraquad

Paraquad is a nonprofit organization whose mission is to empower people with disabilities to increase their independence through choice and opportunity. Founded in 1970 in St. Louis, Mo. by Max and Colleen Starkloff, we are one of the oldest non-residential Centers for Independent Living in the country.

Paraquad is a leader in advancing the independent living philosophy. We envision an integrated community in which people with disabilities are valued and participate in all aspects of society.

Values

- Respect, integration, equal access, opportunities, self-determination, informed choice and individual control for and by people with disabilities
- People with disabilities having control of their own lives and any necessary supports or assistance
- Full diversity within Paraquad, our programs and society at large, in terms of disability, race, ethnicity, age, gender, sexual orientation and religion
- Personal commitment and action to shape the future of Paraquad and the Independent Living Movement
- A work environment characterized by mutual respect, open communication, and team work
- People with disabilities taking a role in the policy and political decisions that impact their lives

About RAAV

The Research Alliance for Accessible Voting (RAAV) includes teams looking at all aspects of accessible voting. We will continue to work on technologies and approaches that address a variety of barriers to voting, including:

- Disabilities as defined by the Americans with Disabilities Act (ADA)
- Lack of educational opportunity
- Difficulties due to aging or other life circumstances
- Limited English proficiency

In addition, the project website <u>www.accessiblevoting.org</u> will be a national resource on the project and accessible voting in general. It is designed to be a model of accessible web design and web content.

EXECUTIVE SUMMARY

Overview of RAAV Poll Worker Training Project

Over the past ten years, Paraquad and the Missouri Disability Vote Project (MDVP) have found that access to the vote on Election Day is almost entirely reliant on the effectiveness of a dedicated team of poll workers who have an understanding of access and available accommodations. While election authorities have the ability to utilize accessible polling sites and purchase well-designed balloting equipment, poll workers are key in making sure that the sites and necessary equipment are set up properly on Election Day.

From May 2011-May 2013, Paraquad and the MDVP set out to evaluate how Election Day workers are currently trained on issues of disability, access, and accommodations. We then developed and piloted suggested training materials to improve the interaction between poll workers and voters with disabilities and ensure that accommodations and accessible voting procedures are available and implemented effectively.

Timeline for RAAV Poll Worker Training Project

- May 2011-April 2012 : Election Day Experience Research
- April 2012-July 2012: Material Development
- August 2012: Election Worker Training Pilot

Overview of Background Research

Background research consisted of Election Day Experience Interviews with voters with disabilities and election administrators. During this research phase we administered a phone interview to 1,200 voters with disabilities in Missouri and Tennessee. We also interviewed 10 County Clerks from across Missouri.

During Voter Experience Phone Interviews, we learned that the major areas where voters with disabilities continue to have problems are the following:

- Inaccessible polling places
- Poll workers who are not knowledgeable about disability or accommodations
- Poll workers who are uncomfortable using the accessible voting equipment

During County Clerk interviews, we talked to a total of 10 County Clerks across Missouri and found the following:

- The most common poll worker training method is through PowerPoint Presentation and lecture
- Average amount of time allowed for poll worker training session is 1 ¹/₂ to 2 hours
- Many County Clerks are opposed to collecting evaluations on poll worker trainings and election day experiences

- There is a need for more information on accessible signage and placement of signage
- Checklists or visual aids on what accessible equipment and accommodations are available and how to use them would be helpful, especially aids that use real pictures
- There is a huge need for *more* poll workers, especially younger, tech savvy workers. This would help with many Election Day issues
- Poll Workers understand information at training, but lose that information by Election Day and end up implementing procedures incorrectly or forgetting about accommodations available. There is a need to make information readily available and usable on Election Day for poll workers to review.
- Interactive and hands-on training modules are popular and well- received but are hard to implement in large group trainings
- Funding constraints prevent County Clerks from making some improvements

Poll Worker Training Material Development

During training material development, we were able to identify training focus areas and possible points of contact with poll workers based on Election Day Experience Research. We also integrated knowledge of best practices in teaching adults in order to develop evidence-based, effective training materials. The result was a well-rounded training packet which we offered to County Clerks to pilot in the August 2012 State Primary Election. The training packet consisted of two main pieces of training material: 1) Pre-Election Poll Worker Training Curriculum Guide and 2) Election Day Picture Guide (job aid for poll workers).

State Primary Election Pilot and Findings

Training materials were piloted in four different Missouri counties, including Cape Girardeau County, Laclede County, Green County, and Christian County. Major findings included the following:

- Poll workers find that having a variety of training methodology is most helpful
- While most poll workers are confident that their poll place is set up in an accessible manner, they still report witnessing voters having access issues
- A majority of poll workers feel very confident and prepared to appropriately interact with voters and also carry out curbside voting accommodations
- There is a discrepancy between the percentage of poll workers who know how to set up an accessible voting machine and the percentage who know how to use accessible features on the voting machines
- The majority of poll workers who participated in the pilot found that having the Election Day Picture Guide available was helpful in carrying out Election Day procedures, especially regarding using accessible voting machines

Challenges and Suggestions for Future Work

During the project, we identified several challenges. This included training time and financial constraints faced by Election administrators, diverse county specific processes in training and

elections, confusion among administrators and poll workers on ADA polling place guidelines, and the limited use of poll worker evaluations.

We also identified some suggestions for future work, including the following:

- Switch the focus of poll worker trainings to how to use job aids instead of information memorization
- Utilize roving deputies and pre-election polling place visits to minimize accessibility issues
- Create improved polling place signage
- Look into and evaluate more hands-on interactive training methodology
- Utilize networking and mutual problem solving opportunities between Election administrators and staff
- Require annual ADA poll place training for Election administrators and staff

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PROJECT OVERVIEW: RATIONALE

People with disabilities face many barriers to voting on Election Day. This makes it harder for many people with disabilities to exercise their fundamental right to vote and participate in our democracy. These barriers include everything from physical inaccessibility of polling locations and inaccessible voting equipment to misunderstandings about accommodations available to and proper etiquette for voters with disabilities.

The barriers to voting on Election Day have many different causes. The specific cause that Paraquad and the Missouri Disability Vote Project (MDVP) focused on for RAAV is that many Election Day workers still lack a basic knowledge of accessibility, disability etiquette, and accommodations available for voters with disabilities.

Over the past ten years, Paraquad and the MDVP have found that access to the vote on Election Day is almost entirely reliant on the effectiveness of a dedicated team of poll workers who have an understanding of access and available accommodations. While election authorities have the ability to utilize accessible polling sites and purchase well-designed balloting equipment, poll workers are key in making sure that the sites and necessary equipment are set up properly on Election Day.

In order to confront this barrier, Paraquad and the MDVP set out to evaluate how Election Day workers are currently trained on issues of disability, access, and accommodations. We then developed and piloted suggested training materials to improve the interaction between poll workers and voters with disabilities and ensure that accommodations and accessible voting procedures are available and implemented effectively.

PROJECT TIMELINE

The RAAV Poll Worker Training project was broken up into the following phases: 1) Election Day Experience Research, 2) Training Material Development, and 3) Training Pilot and Evaluation. Below is a brief overview of each phase. Specifics of each phase will be discussed in following sections.

Phase one was designed to collect basic data and lay a firm foundation for the remainder of the poll worker training project. Various methods were used to collect data on Election Day experiences of voters and training needs identified by administrators. The data collected in this phase informed the materials which were developed and piloted in subsequent phases of the project.

Phase two was the major material development phase. Information gathered during phase one research lead to the identification of training focus areas, major points of contact that can be used to influence poll workers, and best practices that already exist in adult learning. Using this framework, we developed materials to compliment this existing knowledge. Materials will be explained in detail in the following sections but include suggested Pre-Election Day Poll Worker Training Curriculum with lesson plans, PowerPoint, hands-on activities, handouts, checklists, and suggestions for dialogue; as well as an Election Day Picture Guide to be used as a polling place job aid.

Phase three was the pilot phase. All materials developed in phase two were disseminated to pilot counties and used at select polling sites within their jurisdiction. Poll workers and election administrators were given an evaluation of pilot materials to judge their effectiveness. Major findings from the pilot will be discussed in detail in following sections.

PHASE 1: ELECTION DAY EXPERIENCE RESEARCH

During Phase 1, Paraquad and the MDVP, in conjunction with the Tennessee Disability Coalition (TDC), conducted informal research in order to assess the current state of poll worker trainings regarding accessibility and disability, identify areas that need improvement, and secure pilot training sites to implement best practices and improved training materials. There were two main methods of collecting data during this phase: Voter Experience Surveys and County Clerk Interviews.

VOTER EXPERIENCE SURVEYS

The purpose of voter experience surveys was to get a sense of how people with disabilities were experiencing elections. The goal of the calls was to understand what people in the disability community still perceived as problems when it came to voting at their polling place on Election Day. Questions addressed the following areas: voting frequency and method (vote at home or in polling place); obstacles to getting to the polling place; polling place accessibility; poll worker knowledge about accessibility, available accommodations, and disability; poll worker knowledge about using accessible voting equipment; voter - poll worker interactions; and poll worker knowledge about disability etiquette.

Calls were targeted to areas where we knew there was a large disability population and a Center for Independent Living that was active and willing to partner on this project. Calls were also targeted in order to reach a diverse population with a mix of rural and urban voters with disabilities as well as voters from different geographic areas (counties in northern, southern, eastern, and western Missouri, as well as a few targeted counties in Tennessee). A total of 1,200 voters with disabilities completed a voter experience survey.

As a result of these calls we were able to identify the major issues that voters with disabilities face in their polling places. There were three major issues that stood out: 1) poll worker knowledge of how to use accessible voting machines, 2) poll worker knowledge of accommodations available to voters with disabilities, and 3) accessible set-up of polling places.

The first major area concerned poll worker knowledge about how to use accessible voting machines, specifically regarding accessibility features (large print, high contrast, audio, screen tilt, etc.). Only 48% of voters with disabilities from Saint Louis metropolitan area and 53% of voters from greater Missouri felt that their poll workers knew how to operate the accessible machines. No results were available for Tennessee voters.

The second major area dealt with poll worker knowledge about accommodations available to voters with disabilities, including curbside voting, alternative communication methods, offering extra chairs and tables, and moving to the front of the line when necessary. In the Saint Louis metropolitan area, only 44% of voters felt that poll workers were knowledgeable about available

accommodations for voters with disabilities, compared to 64% of voters from greater Missouri and 70% of voters from Tennessee.

The third major area regarded accessible set-up of polling places. This included available accessible parking, accessible entrances, doorways, and pathways, and accessible flow throughout the main voting room. Less than half (43%) of voters with disabilities from the Saint Louis metropolitan area said that their polling place was set up in an accessible manner, compared to 83% of voters from greater Missouri and 92% of voters from Tennessee.

The last major area which we addressed in Voter Experience Surveys was poll worker interaction and etiquette. Overwhelmingly, voters from every area agreed that poll workers were friendly, respectful, polite, and able to appropriately interact with voters with disabilities (98% in both Tennessee and greater Missouri).

COUNTY CLERK INTERVIEWS

The second method we used to gather information was through County Clerk interviews. This consisted of one-on-one, in-person interviews with County Clerks across Missouri. There were multiple goals for meeting with County Clerks. First, we wanted to gain an understanding of challenges that election administrators face regarding poll workers and voters with disabilities. We also wanted to learn about current poll worker training techniques and topics addressed regarding access and disability. Another goal was to get the election administrators' reaction to data we collected during voter experience surveys. Finally, we used County Clerk interviews to secure pilot sites for the 2012 August Primary Election.

County Clerk Interviews were initially targeted towards administrators from counties that participated in the voter experience surveys or clerks from areas where there is an active Center for Independent Living. We also sought interviews with well-respected administrators in Missouri known for using innovative training methods. A total of ten County Clerk interviews were completed. The following counties participated in an interview: Saint Louis City, Saint Louis County, Jefferson County, Saint Francois County, Cape Girardeau County, Boone County, Laclede County, Greene County, Christian County, and Taney County. We also completed an interview with a staff person from the Missouri Secretary of State's Office.

Interview questions fell into four different categories: training content, training logistics, major challenges and complaints, and innovative ideas and suggestions. Training content questions focused on what training methodology administrators used (PowerPoint, hands-on activities, handouts, training specialists, etc.), what content specific to disability and accommodations they trained on (etiquette and interaction, setting up accessible polling place, using accessible voting equipment features, accommodations available, etc.), and how administrators trained on each specific topic. Training logistics questions focused on what voting equipment was utilized in the county (Diebold, ES&S, touch screen, AccuVote, etc.), how long training sessions lasted, how many trainings were offered, and how many poll workers were in each session. Questions

addressing major challenges and innovative ideas and suggestions were broad and left open so as to solicit honest, thoughtful, and unique answers from administrators.

From the interviews, we learned that the most popular and, in many cases, the only training methodology used is lecture/PowerPoint presentation. Administrators that use this training method also usually include a poll worker training booklet of upwards of fifty pages of important information poll workers are supposed to read and know. Also, almost every administrator stated that they trained on disability etiquette, how to set up accessible voting machines, and how to administer curbside voting. However, few clerks trained on how to set up an accessible polling place, how to use accessibility features on a voting machine, and accommodations available to people with disabilities *outside of* curbside voting. The average length of time that administrators stated that lengthening training times was not an option. Finally, almost every administrator, for various reasons, had reservations about giving poll workers evaluations post-training and post-election.

Common needs expressed by County Clerks included the following:

- There is a need for more information on accessible signage and placement of signage
- Checklists or visual aids on what accessible equipment and accommodations are available and how to use them would be helpful, especially aids that use real pictures
- There is a huge need for *more* poll workers, especially younger, tech savvy workers. This would help with many Election Day issues
- Poll Workers understand information at training, but lose that information by Election Day and end up implementing procedures incorrectly or forgetting about accommodations available. There is a need to make information readily available and usable on Election Day for poll workers to review.
- Interactive and hands-on training modules are popular and well received but are hard to implement in large group trainings
- Funding constraints prevent County Clerks from making some improvements

PHASE 2: POLL WORKER TRAINING DEVELOPMENT

After completing Election Day Experience Surveys and County Clerk Interviews, we moved into Phase 2 – Training Development. During this phase, we used information collected during our research to develop poll worker training materials. After examining the information gathered during the research phase, we were able to point out major focus areas that both voters with disabilities and Election Administrators identified as being problematic or challenging, which will be explained below. Next, we brainstormed all of the points of contact that we possibly had to influence a poll worker. Finally, we gathered existing information on best practices in training adults in order to put together the most effective poll worker training plans. Training materials that were developed during this phase included a suggested Pre-Election Poll Worker Training Curriculum and an Election Day Picture Guide for poll workers to use as a job aid.

FOCUS AREAS

Interviews with voters and Election Administrators made it obvious to us that there were four main areas to focus on when developing training materials for poll workers. This included the following topics: poll worker knowledge of how to use accessible voting equipment, accessible set-up of polling places, accommodations available to voters with disabilities, and how to incorporate more checklists and job aids in poll worker trainings and on Election Day. All materials developed during this phase addressed each of these topics.

POINTS OF CONTACT

While brainstorming with fellow RAAV partners and Election Administrators, we were able to identify three different points of contact in which we could use materials and training to influence poll workers: Pre-Election Training with Administrators, Pre-Election Poll Worker Training Sessions, and Election Day job aids for poll worker use.

Pre-Election Administrator training was identified as being important because Election Administrators control the knowledge and materials available to poll workers. In many cases, administrators enjoy creative freedom to develop their own training plans based on suggested knowledge from the Secretary of State and the U.S. Election Assistance Commission. This creative freedom allows administrators to develop unique and exciting training materials that fit their own personality and training styles. However, because of this freedom, there is also the risk that some knowledge conveyed is less than complete or is inaccurate. If an administrator is not trained or up-to-date on accommodations or ADA polling place guidelines, then there is no way that their poll workers will be able to access the necessary knowledge or skills they need in order to run an accessible polling place. For these reasons, we included Pre-Election Administrator training as an important component in poll worker training materials.

Pre-Election Poll Worker training is perhaps the most popular and focused on the area of poll worker training. This is the day that every administrator and poll worker uses to guarantee that

poll workers have the information they need on Election Day. Pre-Election poll worker trainings are used to get a large volume of information out to the most poll workers in the least amount of time. For most poll workers, this is the only opportunity they have to learn the ins and outs of running a polling place, how to interact with various types of voters, and how to ensure that necessary Election laws are being respected and carried out. Pre-Election Day training is most commonly carried out by using a PowerPoint Presentation, disseminating hand-outs, and performing equipment demonstrations.

Election Day job aids were the final point of contact we identified as a way to influence poll workers. Job aids consist of anything available to poll workers at a polling place on Election Day to help them perform their jobs more effectively. These have a high capacity to help poll workers, but are surprisingly under-utilized according to our research. Job Aids are also the only way to deal with issues regarding poll worker retention of information. Election Administrators have to control over the poll workers ability to remember information or memorize processes; however, with the availability of job aids, administrators at least know that all of the information a poll worker needs is readily available for them to use on Election Day at their polling place.

BEST PRACTICES ON TRAINING ADULTS

While developing training materials, we also wanted to be sure that the materials we were developing were in line with existing knowledge on best practices for training adults. This is especially important because so many administrators expressed frustration at the challenges that come along with the prevalence of elderly poll workers, especially regarding highly technical information and retention of information. This section will explain some concepts we followed in creating poll worker training materials in order to ensure that materials developed would be successful and effective for adult learning.

The first best practice suggestion is the use of mixed methods when training adults. Adults learn in different ways and what is a learning strength for some is a weakness for others. Some people may need to read the information in front of them as they hear the trainer speaking it. Others might learn best by having the opportunity to get hands-on experience with the information. Still others are auditory learners and can simply listen to someone talk.. Therefore, presenting materials in different ways is necessary when training a group of adults. Further, by using different styles, adults will be more likely to remember and use what is being taught.

Finally, going along with the concept of mixed methods, the same method should not be used repeatedly for a long period of time. Adults get bored, overwhelmed, and tune out when the same method is used for too long. If someone is bored and tuning out, they most likely will not learn or remember the information that is being presented to them. Using mixed methods and switching up training techniques will encourage more participant engagement, information retention, and overall enjoyment for both poll workers and trainers.

The next concept to consider when training adults is that adults learn more by participating. As adults, we need to be involved and engaged in our own learning process. When someone is talking at us for a long period of time, it is easy to check out. This is especially true for topics that involve a lot of processes or complex information. Adults need to try on these tasks and information, make it familiar and relevant to us, practice it, and experience it. Participating in the learning will help adults better understand the concepts and retain the information. This type of participatory learning also encourages collaboration and knowledge transfer between poll workers who will most likely be working together on Election Day. Collaboration and knowledge transfer are two things that administrators should be encouraging in order to have an effective polling place, so it makes sense to start this process in training before Election Day gets here.

Another concept that is suggested for encouraging adult learning is using handouts. However, these handouts need to be thoughtful, well-designed, and paired with other methods of learning in order to be truly effective. Effective handouts will streamline large, complex bodies of knowledge into easy to understand, operational parts. Handouts or reference sheets should act as route maps, giving poll workers a step-by-step process of how to get from point A to point B while meeting the goals and objectives they are supposed to meet. Checklists and step-by-step guidelines following this concept can provide directions that will encourage and promote poll worker success on Election Day.

Next, when training adults, it is important to keep in mind that adults learn best when new information is reinforced and repeated. Adults need to hear things more than once. They need time to master new knowledge, skills, and attitudes. In order to encourage learning and retention, information needs to be reinforced at every opportunity.

Finally, when developing a training, trainers need to be cognizant of different learning exchanges that should be happening. Successful trainings will include all three of the following exchanges. The first exchange, and most common, is Facilitator to Participant. This consists of a facilitator presenting his or her expertise and information to the participant to learn and remember. The next exchange that should be used is Participant to Participant. This consists of poll workers learning from each other through small group work or partnering. This could also be accomplished through dialogue and group discussion. This type of exchange is especially important for poll workers because this is what they will be doing on Election Day - learning from and with each other. The final exchange is Participant to Facilitator, when a participant has the opportunity to use their knowledge and experience to better inform the facilitator. This comes from the idea that participants bring their own experiences with them and often times have experience that is different than that of the facilitator. Also, this type of learning can help the facilitator understand what participants already know and what information is still needed to ensure poll worker success. This is most likely accomplished in question and answer sessions, discussion and dialogue sessions if the facilitator sets up a really open, informal training environment, or through the use of training and Election Day evaluations.

The most important takeaway from this information is that the traditional style of poll worker training where poll workers sit for two hours and listen to a trainer talk about a PowerPoint presentation does not work. It does not follow best practices for training adults and it does not set poll workers up to be effective and successful. Unfortunately, many administrators who are up against severe time constraints and a small budget rely on this type of training. Traditional PowerPoint / lecture style training allows administrators the opportunity to get a large amount of information to a large group of people in a small amount of time with the least expenditure of resources. However, it is certainly not the most effective way to ensure that poll workers are trained and ready to administer one of the most important aspects of our democracy. All training materials that we developed and suggested for poll worker training use followed these best practices and encouraged administrators to follow them as well.

MATERIAL DEVELOPMENT

By utilizing information on important focus areas, points of contact with poll workers, and best practices in training adults, we were able to develop a package of in-depth and well-rounded training materials. For Election Administrator training, we relied on one-on-one conversations with Election Administrators to explain poll worker training materials and the rationale behind each training topic. Regarding Pre-Election poll worker training, we developed a suggested training curriculum which included a sample PowerPoint presentation, lesson plans, hands-on activities, handouts, checklists, and questions for dialogue. Finally, we developed an Election Day Picture Guide which could be used by poll workers at their polling place on Election Day to help them carry out important disability specific processes.

COUNTY CLERK / ELECTION ADMINISTRATOR TRAINING

As mentioned above, we used one-on-one meetings to brief Election Administrators on important topics and processes that we felt they should be training on. This allowed us the opportunity to speak in-depth about election laws and poll worker expectations. We also used the one-on-one meeting to gauge the administrator's understanding of laws, processes, and training materials. This interaction gave administrators the chance to ask detailed questions and make last minute changes to poll worker training curriculum and job aids.

PRE-ELECTION POLL WORKER TRAINING

Based on information regarding best practices in training adults, we developed an in-depth training curriculum for administrators to use during the Pre-Election poll worker training. We developed a lesson plan for each training focus area identified in the research phase of our project (using voting machines, setting up accessible polling place, and carrying out available accommodations). Each lesson plan included a purpose for the training module, supplies needed to carry it out, goals of the module, a sampling of activities to choose from, and questions for dialogue. Each lesson plan included a variety of activities to choose from including PowerPoint slides, hands-on simulations and activities, handouts, and questions for dialogue. By offering this

sampling, administrators could choose which activities worked best for their training style. Having mixed methods also follows suggested best practices in training adults.

The first lesson was on poll worker expectations and responsibilities. The purpose of this lesson was to help participants understand their expectations and responsibilities as judges and become familiar with tools that would be available at their polling place to help them carry out these responsibilities. Regarding disability and accessibility, this module introduced the tools and materials that would help them carry out required accommodations and communicate with certain voters with disabilities (pencil grips, magnifiers, rulers, pads of paper, extra chairs and tables, Braille and large print handouts). We felt that by telling workers about the available tools and showing them how and when to use those tools, poll workers would not be overwhelmed or confused when a voter with a disability came in and needed those tools or accommodations. Poll workers would not be forced to problem solve on the spot and guess the best way to handle that voter, this problem solving would have already happened in the poll worker training. Administrators could then choose to set these tools out on a table in the training room to allow poll workers to look at them and practice using them. However, because of the commonality and everyday use of these tools we did not feel that this hands-on practice was necessary.

The next lesson dealt with setting up an accessible polling place. The purpose of this lesson was to show poll workers how to effectively set up a polling place with attention to needs of all potential voters. Instead of bogging down poll workers with complex and detailed information on ADA guidelines, some of which poll workers have no control over, we focused on presenting easy actions that poll workers could do in order to ensure a more accessible voting experience. This lesson took poll workers through the entire voting process – parking, approaching the polling place, entering the polling place, finding the voting room, maneuvering around the voting room, and using the voting equipment. During each step of the process, poll workers were briefed on actions they could do in order to minimize common accessibility issues that voters face. Activities administrators could choose from included suggested PowerPoint slides with pictures of accessible voting places, a polling place simulation activity where the training room was set up like an actual accessible polling place, and a polling place set-up map that poll workers could look at as the facilitator was presenting and then take home with them. This showed a picture of an accessible polling place inside and outside, step-by-step instructions to set-up an accessible polling place, and a checklist to follow when setting up the polling place. The lesson ended with suggested questions for dialogue.

The third training topic focused on using accessible voting machines. The purpose of this lesson was to familiarize poll workers with voting equipment and show them how to use different features on the machine. The goals of this lesson were for participants to be able to confidently set up an accessible voting machine, run through a ballot in regular screen mode, run through a ballot in audio mode, learn how to change contrast and text size, and understand how to adjust the screen tilt. We developed a PowerPoint presentation for this lesson but strongly encouraged trainers to use hands-on, interactive activities for this section. Voting machines are complex and

complicated, especially for older poll workers, therefore hands-on, interactive methods were strongly encouraged for this part of the training. Hands-on activities included small group demonstrations, individual demonstrations, and voluntary practice days. We also included a voting machine features checklist so trainers and poll workers could be confident that they addressed all of the important features of the voting machine. The lesson ended with suggested questions for dialogue.

The fourth training topic addressed voter interaction and accommodations. The purpose of this training was to show poll workers how to interact with various voters with different needs. After this module, poll workers would be familiar with different needs voters might have, especially voters with disabilities. They would also be familiar with accommodations they can offer to address each of those needs. Activities included suggested PowerPoint slides, voter interaction demonstrations, voter interaction role plays and skits, and a handout on disability etiquette that poll workers could take home with them. Skits and demonstrations addressed the following situations: available accommodations and how to offer them, interacting with voters with visual disabilities, people-first language, interacting with a voter who is deaf or hard of hearing, and interacting with a voter with an intellectual or developmental disability. The lesson ended with suggested questions for dialogue.

The final training topic addressed the specific accommodation of Curbside Voting. The purpose of this lesson was to prepare poll workers to effectively implement curbside voting while respecting the rights and privacy of the voter. This lesson plan included a sample PowerPoint slide, curbside voting demonstration, and curbside voting small group role plays. The lesson ended with suggested questions for dialogue.

The cost to print one Election Worker Training Guide was \$40 at FedEx Kinkos. This included plastic spiral binding, double-sided pages, color printing, dividing tabs, and a plastic cover and back binder.

ELECTION DAY JOB AID

The final training material we produced was an Election Day Picture Guide. This guide was available at select polling sites on Election Day for poll workers to use when they needed help remembering how to carry out a certain task. The guide was based on a similar guide that the Saint Louis City Election Administration created and currently use at its polling sites. Printed on 11"x17" paper, the guide features step-by-step picture guides on how to carry out important Election Day task. In Saint Louis City's guide, they featured such things as polling place opening instructions, touchscreen and optical scan opening and closing instructions, how to change paper in the machines, how to handle provisional ballots, and closing the polls. Because of the large size of the paper, Saint Louis City was able to use large pictures and large print for each process, which is necessary for some older poll workers, those with low vision or for people who are more visual learners.

In examining the guide, we really liked the use of pictures and the format of the step-by-step instructions. It is clearly in line with best practices in training adults, specifically regarding creating usable and successful handouts. However, Saint Louis City's guide did not feature any information on accessibility, disability, or accommodations. We decided to create our own guide, based off of Saint Louis City's original guide, specifically addressing information poll workers need to know on accessibility and accommodations.

The guide starts out with step-by-step picture instructions on how to set up an accessible polling place with words underneath describing each step in the process. It takes poll workers from the parking lot, to the entry way, down hallways and pathways, and inside and around the actual voting room. Poll workers are introduced to common but easily addressed accessibility issues in each area of the voting process and are given tips on how to minimize or eliminate such issues. On the back side, poll workers can see a checklist of steps to perform in order to set up an accessible polling place.

The next part of the guide addresses accessible voting machines. Since most Election Administrators already trained poll workers on setting up and starting the voting machines, we decided to focus on actually using the voting machine. It is important for poll workers to know how to use voting machines because oftentimes, if a voter has a question during the voting process, the poll worker is the person who is expected to answer it. Further, if a poll worker is confident and comfortable using the voting machine features, they will be more likely to feel comfortable and confident at their polling place when voters are using the machines. The guide featured step-by-step picture instructions on how to cast a regular ballot, change the screen from regular to large print, and change the contrast from low to high. It also featured a step-by-step guide on how to cast an audio ballot, which specific instructions on which buttons perform specific functions.

The guide concluded with step-by-step instructions on how to carry out curbside voting, with a specific section on the do's and don'ts of curbside voting.

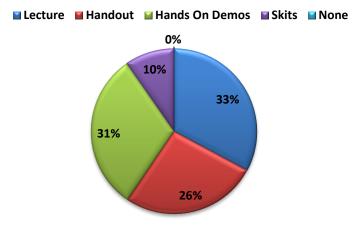
The cost to print one Election Day Picture Guide was \$25 at FedEx Kinkos. This included legal size cardstock paper, plastic binding, double-sided pages, and color printing.

PHASE 3: PILOT AND FINDINGS

Materials which were developed in Phase 2 of our poll worker training project were piloted in the Missouri State Primary Election in August, 2012. Four different counties piloted training materials: Laclede, Cape Girardeau, Green, and Christian. Election Administrators and poll workers were given evaluations to give their feedback on the poll worker training and Election Day job aid. Results from the pilot will be described below.

MOST HELPFUL TRAINING ACTIVITIES

Poll workers reported that the most helpful training activities were a combination of lectures, handouts, and hands-on demonstrations. Only 10% of poll workers stated that skits were helpful. This is consistent with the best practice in training adults which states that mixed methods should be used when training adults. The graph below shows that 31% of poll workers preferred hands on demos, 33% preferred lectures, and 26% preferred handouts.



Combined: Most Helpful Training Activities

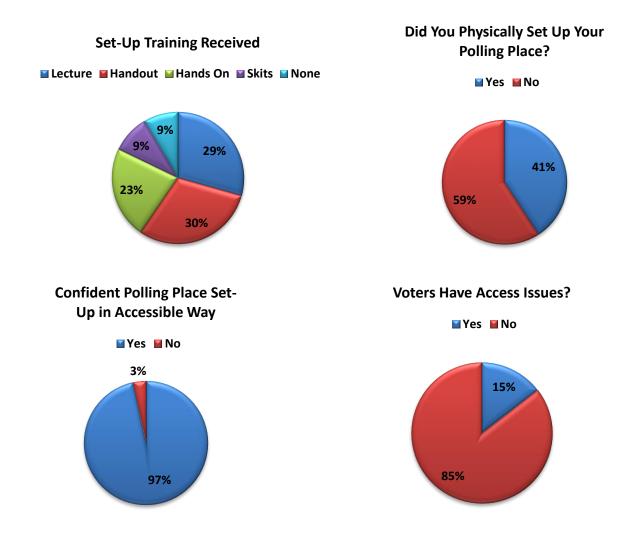
POLLING PLACE SET-UP

The next section of evaluation addressed polling place set-up training materials. The most common type of polling place set-up training was handouts, followed closely by lecture/PowerPoint. Surprisingly, overall, 9% of poll workers reported they received no training regarding properly setting up their polling place, with 18% of poll workers in one specific county reporting they received no training in this area.

It is also interesting to note that in each county the majority of poll workers felt that their polling place was set up in an accessible way (between 95% and 100%). Yet, when asked if they witnessed a voter having accessibility issues in the polling place, a significant number of poll workers stated yes, there were voters who experienced problems with accessibility at their

polling place (between 10% and 26%). This suggests that there may still be a lack of understanding among poll workers about what it means for a polling place to be truly accessible.

The graphs below state the following information. About 30% of poll workers were given handouts on polling place set-up and 29% viewed a PowerPoint/lecture on this material. 23% had hands on training, 9% had skits, and 9% received no training on setting up an accessible polling place. Only 41% of poll workers physically set up their own polling place, with 59% reporting that someone else set the polling place up. 97% were confident their polling place was set up in an accessible manner, with 15% stating they witnessed a voter having an accessibility issue.

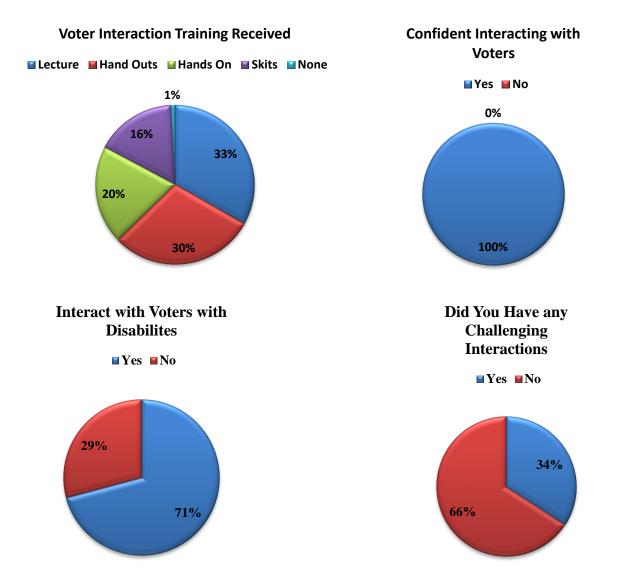


VOTER INTERACTION

The next part of the evaluation addressed voter interaction. The most common type of training received regarding voter interaction was PowerPoint/lecture (33%) followed closely by handouts (30%). 20% of poll workers were trained with skits, 16% received other hands on training. Every

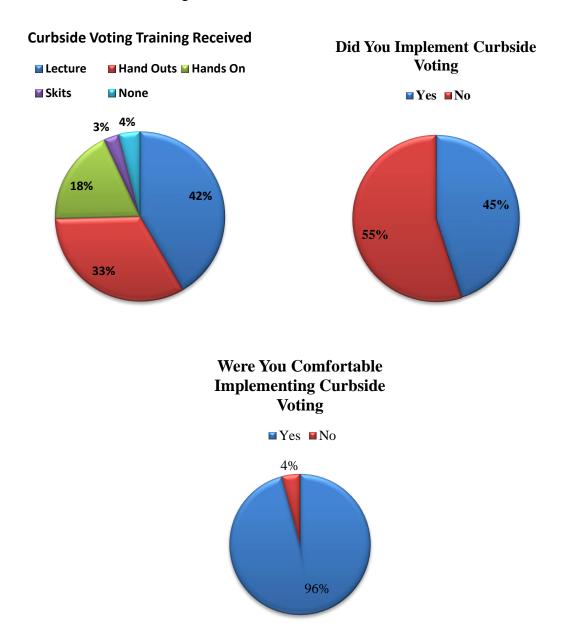
poll worker surveyed (100%) reported that they are comfortable interacting with voters on Election Day. Overall, 29% of poll workers indicated that they interacted with voters with disabilities. While 100% of poll workers reported confidence in interacting with voters, 34% reported having challenging interactions with voters.

It would be interesting to see what kinds of interactions are considered challenging by poll workers. Also, further information is needed on how poll workers handled specific situations that required understanding of accessibility and accommodations. Poll worker confidence does not equal poll worker competence in areas of interacting with voters with accessibility needs. Further research should focus more on identifying what constitutes a 'challenging' interaction and methods used to address accessibility needs.



CURBSIDE VOTING

The next part of the evaluation addressed curbside voting. PowerPoint/lecture was the most common activity used to train poll workers on curbside voting (42%), followed closely by handouts (33%). 18% of poll workers were trained using hands-on techniques. Overall, almost half of poll workers stated that they, or someone at their polling place, implemented curbside voting (45%). Of those that implemented curbside voting, a very small percentage, 4% overall, indicated that they did not feel confident carrying out the tasks associated with curbside voting. The main issue with curbside voting seems to be a lack of signage letting voters know this is available for those who need it and an under-developed process for letting poll workers know that someone outside is waiting to curbside vote.



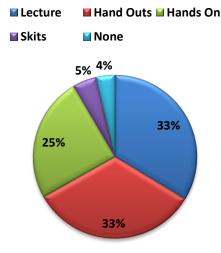
USING ACCESSIBLE VOTING EQUIPMENT

The next part of the evaluation addressed using accessible voting machines and touchscreens. The majority of training on using accessible voting machines consisted of lecture/PowerPoint (33%) and handouts (33%), despite an attempt to encourage more hands-on training with voting machines. Significantly more poll workers reported having some kind of hands-on training on voting machines than on other topics (25%).

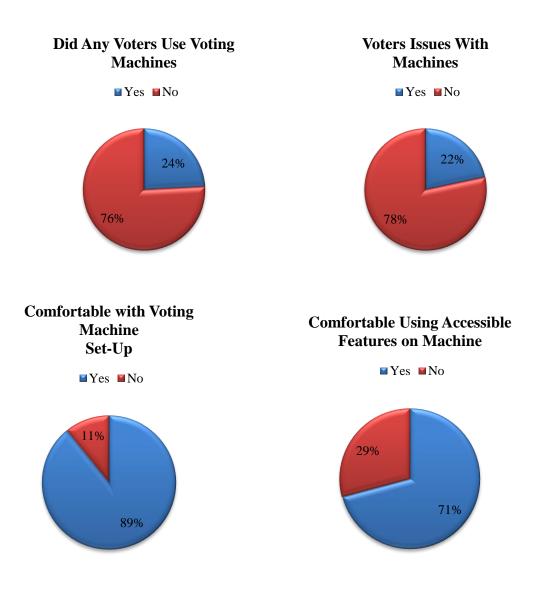
Overall, 24% of poll workers evaluated stated that the voting machine in their polling place was used by voters. Of those that reported machine use, 22% stated that a voter had issues or challenges using the voting machine.

Interestingly, poll workers reported differences between confidence with setting up voting machines compared to confidence using accessible features on the machine. Overall, 11% of poll workers were not confident setting up their electronic voting machines. In comparison, 29% of poll workers were not comfortable using the accessible features on voting machines (over half, 52% of poll workers, in one county stated that were not comfortable using the accessibility features of the accessible voting machines).

This indicates that there may be less emphasis in training on how to utilize features of the machine and that much of the focus is on setting up and closing down the machine properly. This could affect the probability of a poll worker encouraging people with accessibility needs to use the voting equipment and most likely affects the poll worker's ability to assist a voter with accessibility needs in using accessible features of the machine.



Voting Machine Training Received

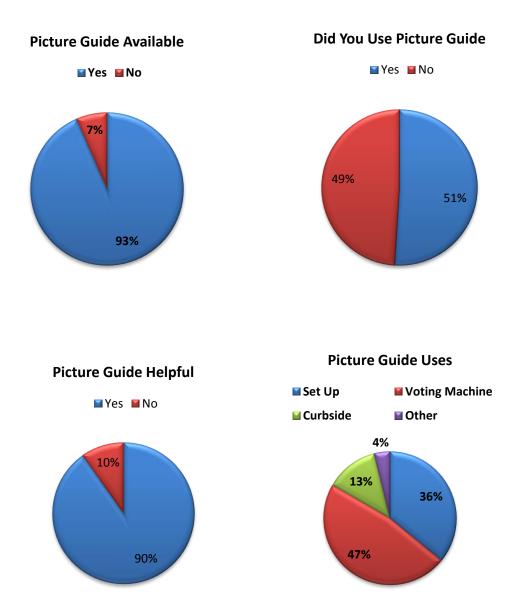


ELECTION DAY PICTURE GUIDES

Finally, poll workers were asked for feedback on the Election Day Picture Guide. Election Day Picture Guides were available in 93% of polling places evaluated. Just over half (51%) of poll workers exposed to the Election Day Picture Guide reported that they used it to help them during the Election Day (close to 70% of poll workers in one specific county reported using the guide). Of those poll workers who used the picture guide, a majority (90%) reported that they found the information in the picture guide to be helpful in carrying out their poll worker duties.

The most common use of the Election Day Picture Guide was for Electronic Voting Machine Assistance (47%). The second most common use was for polling place set-up, with 36% of poll workers overall stating that they used the picture guide to help them with this task. A very small percentage of workers used the picture guide to assist with curbside voting (13%).

It is interesting to note that the area where poll workers were the least confident (using accessible voting machines) is the same area where they sought the use of the Election Day Picture Guide the most. This suggests that the picture guide did fill a training gap for some poll workers. One County Clerk, in retrospect, suggested that the Picture Guides also would be a great option for those Election Administrators who had limited time and resources to train all of their poll workers on every piece of information they needed to know for the Election.



CHALLENGES TRAINING TIME CONSTRAINTS

The main challenge we ran into with the curriculum development and implementation was with time constraints. Many County Clerks we spoke with only allowed between 1 ¹/₂ to 2 hours to train poll workers on everything they needed to know for Election Day, including logistics of the day, checking voters in, relevant regulations to follow, polling place set-up, using voting machines, interacting with voters, and specific accessibility and accommodation information. This is a huge amount of information to cover in a short amount of time. A few County Clerks gave feedback stating that even the PowerPoint/lecture portion of the curriculum developed was too lengthy to fit in the allotted time and keep poll workers' attention. This left very little room for hands-on training, interactive activities, or demonstrations.

FINANCIAL CONSTRAINTS

Another challenge we heard from County Clerks was that they actually would like to spend more time developing training materials and invest more time into adequately training their poll workers. However, they have experienced a shortage of resources (time and money) that would allow them to do such things. Poll workers already only get paid a very small amount of money to spend a few hours at training and a whole day working at an Election. This, plus the fact that Elections take place on a Tuesday in the middle of the work week, lead to a shortage of qualified poll workers.

In addition, to require more training time for poll workers would mean County Clerks would need more money to invest in paying poll workers for that extra time. Further, if County Clerks and Elections staff wanted to develop their own updated county specific picture guides and training materials, they would need more money for printing such materials and keeping them updated with ever changing guidelines and equipment. This makes updating and improving processes difficult, if not impossible, for many Election Administrators.

DIVERSE COUNTY SPECIFIC PROCESSES

Perhaps related to the problem of time constraints, we also found that there is extreme diversity between different counties and their voting machines and training processes. This leads to a great variety of training curriculum between counties. We found that some counties we talked with went above and beyond expectations, offering a multitude of hands-on opportunities to use voting machines and even separating poll workers into specialized roles in order to train people on more in-depth processes (especially regarding technology and voting equipment). One County Clerk stated that when he trained poll workers extensively on voting machines and encouraged them to offer this to all voters, they actually had record numbers of voters use the voting machine to cast their ballots.

While there were a few counties that went above expectations, there were also some that we found were not meeting the minimum training requirements that should be expected. For example, some counties did not even include accessibility and accommodation information in their standard Election Judge Training Manual, a paper handout with upwards of 50 pages of Election Day information for poll workers. If the information was not in this manual, we have reason to believe it was not being trained on in the actual poll worker training session as well. Other County Clerks expressed reservation about training in depth on the voting machines and curbside voting as they did not want to "encourage poll workers to encourage voters" to use such accommodations. There was a fear among some County Clerks that by advertising these accommodations and encouraging poll workers to use them, they would inadvertently encourage voters who do not have a need for that accommodation to take advantage of it.

Having such diversity in training curriculum, voting equipment, and poll worker expectations across the state made it very difficult to develop materials that would be helpful to different counties.

CONFUSION WITH ADA POLLING PLACE GUIDELINES

Another problem we ran into with curriculum development and implementation was that there seemed to be confusion among some Election staff on what they were required to do under the ADA polling place guidelines regarding accessibility. We received excessive feedback from one county in particular which expressed a lot of pushback against our polling place set-up training recommendations. All recommendations made in the curriculum were straight from the Department of Justice and the ADA Polling Place Guidelines. To receive such pushback from officials on these federally mandated guidelines suggests that there is still a lack of understanding among those in charge of county Election administration on their accessibility requirements. If County Clerks and training staff are confused and unaware of their requirements, then it is almost certain that they are not training poll workers and preparing them appropriately to run a truly accessible polling place.

LIMITED EVALUATION TECHNIQUES

A major limitation in Election Administration is a lack of poll worker evaluation techniques and an overwhelming opposition to evaluating poll worker trainings and Election Day happenings. Evaluation is crucial in order to assess if the poll worker training being administered is effective and gauge what information is still needed from workers. The only way processes and trainings can be improved is by utilizing an effective evaluation tool. Also, it is not enough to evaluate a poll worker at the poll worker training session. Such evaluations only tell you what the poll worker learned that day. They are not effective in evaluating if that training helped the poll worker successfully carry out necessary procedures on Election Day. An effective evaluation technique to assess poll worker knowledge on Election Day is also needed in order to improve poll worker training materials and processes. Most administrators are very opposed to this for various reasons, from fear of receiving negative feedback to a feeling that evaluations will scare the already limited population of poll workers away.

Finally, regarding evaluation of our poll worker training curriculum and Election Day job aids, we were unable to create and use an in-depth open ended evaluation method. Per County Clerk request, we limited the number of questions we asked and only allowed yes/no or multiple choice answers. While this may have increased the number of poll workers who took the time to complete the evaluation, it also made it impossible to collect more specific and detailed information from poll workers. Many of the areas where the data is lacking is due to that inability to ask open ended questions. Further, some necessary data would best be collected by visual observation of poll places on Election Day by people trained and well versed in voting accessibility and accommodations. We were unable to contribute the people power or resources that would have been necessary to have these people watching every polling place which piloted training materials.

Also, we were unable to place evaluations or survey actual voters with disabilities at each pilot site. The data in this report is reflective only of the reactions and experiences of poll workers and County Clerks. To get a true picture of the effect of our developed training curriculum and job aids, we need to evaluate how it affects the experience of voters *and* poll workers.

SUGGESTIONS FOR FUTURE ACTIVITIES

Over the course of the poll worker training project, we were exposed to many different ideas and suggestions for poll worker trainings. Many of the ideas came too late to pilot and evaluate. However, they deserve a mention in this report as possible ways to improve our piloted materials specifically and poll worker trainings in general.

TRAIN BASED ON ELECTION DAY JOB AIDS

The first suggestion from a few well-known Election Administrators is to move away from a heavily information focused poll worker trainings and focus on training poll workers to effectively use job aids. Poll workers are increasingly expected to learn more and more complex information and processes. It is unlikely that a training can be developed that will effectively teach poll workers all of those processes and complex information while still respecting the funding and time constraints that County Clerks are facing. Therefore, it was suggested that Election Administrators focus on developing high-quality, process specific job aids for poll workers to use on Election Day and spend the majority of training sessions training poll workers on how to effectively use those job aids. This might solve the issues of too much information, lack of information retention, and limited training time and funding.

UTILIZE ROVING DEPUTIES FOR ELECTION DAY ACCESSIBILITY NEEDS

Another interesting idea that was suggested is to add one more point of contact with poll workers in our training curriculum. Roving Deputies play an increasingly important role in many voting jurisdictions. These deputies could also be trained on accessible polling place set-up and disability specific information. They could be given checklists regarding accessibility and accommodations which they would fill out when they visit each polling place. This could help insure that polling places are physically accessible on Election Day and help begin the troubleshooting process in order to make polling places more accessible in the future.

ASSESS POLLING PLACES IN PERSON BEFORE ELECTION DAY

Another suggestion along the same lines is to have each poll supervisor go with the County Clerk to each voting place in person before Election Day. This has been done in Jefferson County, Missouri, before and the County Clerk stated they saw great results. They were able to see accessibility issues before they happened and create plans to address those issues in advance, including improved signage, alternate pathways, and better voting room flow. Because of this pre-election planning, the supervisor was aware of potential unavoidable problems that might happen on Election Day and knew how to handle them when they came up.

CREATE IMPROVED ACCESSIBLE SIGNAGE

Something that County Clerks and administrators suggested more of, which we were unable to do during this project, is create and use more effective and accessible signage. Even voters in

post-election focus groups stated that polling place signage needs to be improved. Signage should clearly show voters what their voting options are, what accommodations are available, and what they can do in order to get assistance. Signage should also clearly point out accessible pathways and entrances.

EXPERIMENT WITH AND EVALUATE INNOVATIVE TRAINING METHODOLOGY

Regarding training methodology, there are two very unique and interactive training models being used in Missouri which are interesting and should be noted. We were unable to evaluate these training styles, but feel that it would be worthwhile to look into them and gauge their effectiveness. The first style is an interactive round-robin style training. This training is used in a largely rural county. The Election staff in this county stated that they decided to no longer use lecture and PowerPoint trainings because poll workers were not retaining information and there were too many errors. Instead, they used a round-robin style training. The training had twelve stations and poll workers were broken up into groups of six or seven. Each group visited a station for 15 minutes at a time to learn about different training topics and get hands on practice. They stated that poll workers loved this style of training and felt more prepared than they do following a PowerPoint based training. They also felt as if the monotony of regular trainings was broken.

However, there are a few setbacks to this style of training. First, it lasted four hours instead of the regular two. A larger training space was needed, it took a bigger time commitment from staff in order to successfully implement all processes, it cost more money overall, and was overall more wearing on the Elections staff. However, despite these setbacks, staff in the Elections office stated that the benefits of the training outweighed the extra costs.

The other interesting methodology is a mock election style of training. This training is used in a largely rural county with few voting places and few poll workers. The training room is set up exactly like a polling place should be. The County Clerk brings in two or three precincts at a time for training so that people are trained alongside the poll workers they will be working with on Election Day. Each group of workers goes through every process of Election Day together in a very interactive and hands-on training. Election staff pose as voters with various needs and poll workers are able to practice problem solving skills that they will need on Election Day in order to be successful. This type of training happens once every major election year. Again, we were unable to evaluate this method but feel that it would be useful for someone to evaluate its strengths and weaknesses in the future.

CREATE MORE NETWORKING AND PROBLEM SOLVING OPPORTUNITIES FOR ADMINISTRATORS

Another observation that came out of this project is that there is a lot of value in opportunities for Election administrators and training staff to come together and brainstorm solutions to challenges and ideas for improvement in elections. This goes beyond common election administrator trainings and information sessions and puts the election administrators and staff in the seat as experts. Almost no challenge is a new challenge in elections; if one administrator is dealing with a new problem, it is likely that other administrators have dealt with it before and have come up with unique and innovative ways to deal with it. This idea sharing and networking could lead to more effective trainings and processes across the country. It would only be strengthened by then inviting actual voters who experience challenges or difficulties at the polls to share their insights and experiences and offer their own suggestions in an open and honest dialogue.

The following are two ideas that came out of this type of process this past year. First, many administrators experience challenges with voters who are unable to stand in lines for long periods of time. Legally, voters with disabilities who can't stand in line for long periods of time are allowed to cut to the front of the line as an accommodation. However, this can cause controversy with other voters who may not understand the reasoning behind the cutting and feel that it is unfair, as they have to wait the full time. Many voters with disabilities also do not feel comfortable cutting, as they do not want to be perceived negatively as rude or lazy. Finally, administrators are uncomfortable educating about this accommodation and enforcing it because they fear people will take advantage of it and use it when they do not really need it. One administrator has solved this issue in her area by instituting a "green card" system. If a voter cannot stand for long periods of time but does not want to cut the line, the poll worker simply gives a color coded card to the person directly behind that voter in line. The voter takes the same color of card, and sits in a chair, waiting for their turn to vote. Once the voter with the card gets to the front of the line, the poll worker at the check in table knows that another voter is comfortably waiting in a chair for their turn to vote. Of course, if the voter with the disability prefers to cut to the front of the line, this option is still available to them as well.

Another administrator wanted to figure out how to better evaluate her poll workers during their poll worker training. She wanted to be able to see what poll workers were learning as the training was happened so she would know what topics needed more time and which were nearly mastered. She instituted a "paddle game" where she would ask questions during the training to gauge what information had been learned. Once a question was asked, poll workers would hold up their paddles to indicate their answers. The trainer was able to see if a majority had gotten the information they needed to know or if she needed to reiterate the main points. This also showed her if there were particular poll workers who needed extra one-on-one attention regarding certain topics. This was a fun and non-threatening way that she was able to assess the effectiveness of her training with poll workers.

REQUIRE ANNUAL ACCESSIBILITY AND DISABILITY TRAINING FOR ADMINISTRATORS

Finally, as with any other profession, we feel it is necessary to continually offer trainings to election administrators and staff on issues of accessibility, accommodations, and disability. Even though the ADA was passed in 1990 and other pertinent election laws were passed well before then, it is obvious that there is still confusion and misunderstanding about what is necessary,

what is legally required, and how administrators can make sure legal election-related accessibility requirements are being successfully carried out. We strongly suggest that these types of trainings and information sessions still be offered to staff and administrators and that a system of accountability is set up in order to ensure that administrators across the country are trained and up-to-date on the important accessibility and disability specific information that is necessary in order to run a truly accessible, successful election.

CONCLUSION

Poll workers are expected to learn and memorize a growing body of information in order to implement Election Day processes. This information is increasing becoming technology based, especially with the use of accessible voting machines and iPads as part of an accessible voting place. While this technology can go a long way in improving voting options for voters with disabilities, it is up to the poll worker to ensure the technology is available for voters who need it. Further, election administrators are expected to train these workers on more information with limited time and resources available to dedicate to this task. This creates a complicating and seemingly impossible challenge for many election administrators.

In order to ensure that poll workers are prepared to implement these processes and make them available, election administrators need to be willing to think outside their normal training processes. It is evident that a traditional pre-election PowerPoint presentation is not enough to prepare poll workers to be successful, especially when it comes to accessible voting technology. It will be necessary for administrators to be creative and flexible in order to meet the training needs of their poll workers.

The step-by-step picture guide, which was piloted and evaluated in the 2012 State Primary Election in Missouri, has been shown to be popular with both administrators and poll workers alike. Election administrators should consider adapting this and using it to supplement their training process to meet their needs.

Several challenges still exist, which have been identified in this report, when it comes to ensuring accessible elections for everyone. However, a multitude of resources and suggestions exist and are just waiting for administrators to utilize them in their effort to improve elections. The Research Alliance for Accessible Voting (RAAV) is one such resource. Partners in RAAV can offer opportunities for networking and professional development, information on assistive technology and designing accessible voting machine interfaces, suggested practices for training poll workers and election administration in general, and up-to-date research on voting experiences and challenges for voters with disabilities, to name a few. Access these resources at www.accessiblevoting.org.