# ELECTION WORKER
# Successful Practices

RECRUITMENT, TRAINING, AND RETENTION

# 2016

# INTRODUCTION

Since the release of the groundbreaking 2007 Successful Practices for Poll Worker Recruitment, Training, and Retention, election officials across the country have adopted new methods for recruitment, training, and retention of election workers.

Social media platforms such as Facebook, YouTube, and Twitter are being increasingly used by election administrators to recruit, train, and stay connected with their force of election workers.

In 2015, the EAC released the Quick Start 6 Tips to Employ Effective Poll Workers, with less text and more links to the latest best practices.

However, in today's fast-paced world the election administrator has even less time for reviewing large amounts of content, resulting in the need to directly connect to information almost instantly.

Recognizing these changes, this new edition of the Election Worker Recruitment, Training, and Retention manual is divided into four sections and lays out the information in a quickly accessible format, including the latest best practices, via social media formats and links to websites.

You can click on any topic and it will take you to the specific information you need, as field-tested by your colleagues.

# TABLE OF CONTENTS

# QUICK LOOK
# ONLINE MANUAL

If you're having one of "those" days and need some quick samples of what your colleagues have field-tested, scroll through the links on the next two pages for fast solutions to some common problems.  Look at the entire online manual for lots of creative solutions and expanded ideas.

# QUICK LOOK
# ONLINE MANUAL

To recruit the general public and high school or college students, click below:

https://www.youtube.com/watch?v=4MgYy9r1zak

https://www.youtube.com/watch?v=tJrSEnNw7J4

https://www.youtube.com/watch?v=oXBgsWLnDAE


If you're looking for bilingual, government or civic group election workers, click below:

https://www.youtube.com/watch?v=BXhJ61g3Isg

http://goo.gl/f8kXuf

http://goo.gl/H8GHLI

Need a quick idea for a training video, web-based training or online training?  Click below:

https://www.youtube.com/watch?v=swTNVT-5SxM

http://goo.gl/lkxmQf

http://goo.gl/31LcpG

If you're looking for specialty training – e-poll books, provisional ballots or accessibility training, click below:

https://www.youtube.com/watch?v=GhEu4B2C-Wk

https://www.youtube.com/watch?v=YKo8-39rE1k

https://www.youtube.com/watch?v=ZzGL3x1fyds

If you need some good ideas to develop a new training manual, click below:

http://goo.gl/r4z2i6

http://goo.gl/fLwPt3

To let your election workers know how important they are to your success, click below:

https://www.youtube.com/watch?v=Abu9deILCA8

http://goo.gl/Xgl0NL

# RECRUITING ELECTION WORKERS

Recruiting election workers for the 21st century requires new approaches that take advantage of innovative technology as well as make use of time-tested methods to reach all segments of our diverse population.

More is required than just adequate staffing at the polling place. Today's election work force participates not only in Election Day precincts, but vote centers, early voting, absentee and early tallying boards, recount boards, and post-election audits. The skill sets needed to carry out these activities with confidence and transparency requires election administrators to use every tool at their disposal in recruiting these essential workers.

# TARGETING THE GENERAL PUBLIC

Recruiting capable election workers requires crafting a strong message about your specific needs and one that reaches all segments of society.

☐ Develop a "marketing" strategy that includes the reasons election workers volunteer, such as civic duty, community service, social interaction, high school or college credit, family tradition, as well as earning extra money

☐ To recruit election workers with tech-savvy skills, inform the public of your specific needs with a high-visibility notice on your website

☐ Develop specialized recruiting for high school and college students, corporations and businesses, civic groups, government workers, and existing election workers

☐ Be clear about what is involved in being an election worker

☐ Create flyers that target multiple groups, including civic, business, and student associations

# TARGETING THE GENERAL PUBLIC

- ☐ Use well-designed brochures with a catchy slogan, and place in high-traffic locations

- ☐ Broadly distribute recruitment postcards and letters and have sign-up sheets at polling places

- ☐ Social media such as Facebook, Twitter, YouTube, etc., are all good ways to communicate with the public

- ☐ Consider advertising on Google, Yahoo, or Craigslist

- ☐ You can also get local media to run public service announcements

- ☐ Be prepared to respond and have a follow-up plan when potential workers call or email

- ☐ Make sure to track the results of your recruiting efforts to guide you in the future

# TARGETING THE GENERAL PUBLIC

## BENEFITS

→ You can target specific groups for the type of workers you need

→ Presentations to organizations also serve voter education goals

## CHALLENGES

→ In-person recruitment efforts can be time consuming

→ Social media and email communications require dedicated staffing

## TIPS

- Contact past election workers

- Be specific in outlining your needs

- Compare notes with other election officials

# TARGETING THE GENERAL PUBLIC

## ADDITIONAL RESOURCES

Brief Recruitment Messages

https://www.youtube.com/watch?v=4MgYy9r1zak

https://www.youtube.com/watch?v=RrU23548ZP4

https://www.youtube.com/watch?v=TJ-HLHMl3O0

https://www.youtube.com/watch?v=T09SG9gLX4g

https://www.youtube.com/watch?v=n7TlUfw7wbQ

Recruitment Messages With Job
Requirements and Duties

https://www.youtube.com/watch?v=FS4G9yD08NM

https://www.youtube.com/watch?v=sNqqrwR1HTs

https://www.youtube.com/watch?v=N0rne06usGU

https://www.youtube.com/watch?v=n22j-BOsU5k

## ADDITIONAL RESOURCES

Web-Based Recruitment

http://goo.gl/kpMMYT

http://goo.gl/oV694t

http://goo.gl/HHyVBd

Online Election Worker Application

http://goo.gl/Ff80tW

http://goo.gl/hlv3h0

https://goo.gl/sk1Apz

Tracking Election Worker Applications

http://goo.gl/2Lnoxr

# APPEALING TO HIGH SCHOOL AND COLLEGE STUDENTS

High school and college students bring dynamic energy and essential skills to the polling place. Creating relationships with your local schools will help bring this energy into your work force and also engage students in the election process.

- ☐ Start early and take advantage of campus events so you can coordinate with professors and teachers and willing school contacts

- ☐ Partner annually with schools and professors to help engage students in community service and possible course credit

- ☐ Request a campus-wide email, Web page, or social media message to recruit tech-savvy, high-energy, and bilingual students

- ☐ Provide information on what statutes permit student election workers to do and if they can be paid

- ☐ Consider providing training on campus or developing an app for mobile devices

- ☐ Google AdWords, Craigslist, and Facebook can be good ways to connect with potential election workers

- ☐ Mock or student body elections can spur interest and generate volunteers

- ☐ Contact the student disability office to help recruit students with disabilities

# APPEALING TO HIGH SCHOOL AND COLLEGE STUDENTS

## BENEFITS

→ Students who commit to teachers are likely to show up

→ Students are generally more comfortable with the latest technology

→ Studies have shown that students' energy and enthusiasm are well received by older election workers

→ Recruiting students is another opportunity to identify both bilingual and disabled election workers

→ Exposure to the voting process stimulates interest in elections and can help create lifelong voters

# APPEALING TO HIGH SCHOOL AND COLLEGE STUDENTS

## CHALLENGES

→ Be prepared to spend time in your recruitment efforts

→ Some states require additional paperwork to use students

→ Transportation to and from the polls may be an issue

→ Expect and plan for high turnover from semester to semester

## TIPS

• Students are more likely to respond to text messages than emails

• Partner with Political Science and History professors, or representatives of the Honor Society

# APPEALING TO HIGH SCHOOL AND COLLEGE STUDENTS

## ADDITIONAL RESOURCES

Student Recruitment

https://www.youtube.com/watch?v=pRDfsbXh5PM

https://www.youtube.com/watch?v=oXBgsWLnDAE

http://goo.gl/2bjHYI

http://goo.gl/JycgcX

http://goo.gl/aAdtvw

http://goo.gl/ruWvnK

https://goo.gl/It42mP

http://goo.gl/ksCfL4

# FINDING BILINGUAL WORKERS

Bilingual election workers perform a valuable duty by providing language assistance to voters, enabling them to participate more effectively at the polls.

- ☐ Always provide election worker information on your website in the languages spoken in your community

- ☐ Create printed brochures and widely distribute for members of the minority language community who may not use technology as a communication tool

- ☐ Remember that many Native American languages may be oral and not written, so reach out to Native American speakers for help

- ☐ You can ask your existing election workers to help identify bilingual members of the community who might be willing to serve

- ☐ Work actively with minority language community groups

- ☐ Identify and include minority language media outlets in your efforts

- ☐ Remember to reach out to your colleges and universities to recruit bilingual students

# FINDING BILINGUAL WORKERS

## BENEFITS

→ Bilingual workers satisfy federal voting rights requirements and they can make your polling places user-friendly

→ You will find that many of your polling place operations will run more efficiently with bilingual speakers

## CHALLENGES

→ Your minority language workers must also be proficient in English

→ You may need to educate some election workers and voters on the value of bilingual election workers and the legal requirements to provide language assistance

## TIPS

- Public sector employees often have bilingual skills

# FINDING BILINGUAL WORKERS

## ADDITIONAL RESOURCES

FINDING BILINGUAL WORKERS

https://goo.gl/Zl9JYe

# SOLICITING HELP FROM BUSINESS, CORPORATE, CIVIC AND CHARITABLE ORGANIZATIONS

Many businesses, charitable, and civic organizations are eager to contribute to their community through service at the polls on Election Day. Appealing to these groups will help you engage potential members who will serve at the polling place.

- ☐ A personal appearance at group meetings can be a highly effective recruitment tool

- ☐ Contact volunteer centers in your community to find election workers

- ☐ Corporate programs can help recruit tech-savvy workers

- ☐ Ask to reach out to staff through their organization's list server, HR department, or intranet

- ☐ Request that the organization create a link on their website to the recruiting section of your website

- ☐ Consider "Adopt a Polling Place" programs

- ☐ Be sure to maintain contacts with organizations between election cycles

# SOLICITING HELP FROM BUSINESS, CORPORATE, CIVIC AND CHARITABLE ORGANIZATIONS

## BENEFITS

→ A wide sweep increases general community awareness of the need for election workers and provides additional opportunities for voter education

→ Broad outreach helps ensure polling places are fully staffed

→ Your outreach programs can create added incentive for workers to show up on Election Day

## CHALLENGES

→ You may need to provide training at the organization's location

→ Working with groups will require a long lead time and regular reminders

→ Political challenges may result if organizations have any vested interest in certain ballot questions or candidates

## TIPS

- Remember to publicly recognize groups for participation

# SOLICITING HELP FROM BUSINESS, CORPORATE, CIVIC AND CHARITABLE ORGANIZATIONS

## ADDITIONAL RESOURCES

Corporate Recruitment

http://goo.gl/qYyJYm

http://goo.gl/qDMyPg

Adopt a Polling Place

http://goo.gl/HeGUQ1

http://goo.gl/WI0oA7

# ENGAGING THE SKILLS OF GOVERNMENT WORKERS

Recruiting public sector workers can ensure a dependable work force of committed, tech-savvy, and knowledgeable election workers.

☐ Partner with your IT department to send recruitment emails to other government agency accounts

☐ Consider approaching high-profile elected officials to sponsor an election worker recruitment program

☐ Be sure to maintain contacts with government agencies throughout the year

☐ Work with your HR department to recruit recently retired government workers

# ENGAGING THE SKILLS OF GOVERNMENT WORKERS

## BENEFITS

→ Government workers are tech savvy and will know the importance of administrative procedures and statutes

→ Government workers are more likely to show   up after making a commitment to their supervisor

## CHALLENGES

→ Expect to devote time in your communication efforts

→ Assure supervisors you will be mindful of depleting their personnel

→ Exercise caution in using political appointees

## TIPS

- IT departments can be a good source for Election Day troubleshooters

# ENGAGING THE SKILLS OF GOVERNMENT WORKERS

## ADDITIONAL RESOURCES

Government Workers

http://goo.gl/465lte

# INVITING PEOPLE WITH DISABILITIES TO SERVE

By forming partnerships with representatives from the disability community, you can ensure your polling places are more accessible and welcoming to voters with disabilities. This sends a strong message about your commitment to expand the election process to all voters.

- ☐ Develop ways to partner throughout the year with agencies that serve the disability community

- ☐ Be prepared to offer alternative formats of documents that you use for recruitment and all your election operations

- ☐ Suggest election workers with disabilities choose the jobs they feel best able to perform

- ☐ Most states have an office serving people with disabilities. Ask them to be an active part of your recruitment efforts

- ☐ Use social media such as YouTube, Facebook, and Twitter to reach out to people with disabilities

# INVITING PEOPLE WITH DISABILITIES TO SERVE

## BENEFITS

→ Election workers with disabilities can send a strong message of welcome to disabled voters and seniors with special needs

→ Disabled election workers can help guide you in making your polling places more accessible

## CHALLENGES

→ Making sure disability-friendly technology is available requires additional time and resources

→ You will need to ensure that transportation issues can be met for those with physical limitations

## TIPS

- Educate all election workers on disability etiquette at the polls

# RECRUITING FROM POLITICAL PARTIES

Many states require a portion of election workers to be supplied by political parties. Making special efforts to recruit and train members of political parties will result in increased confidence in the transparency of the election process.

- ☐ Many state laws require election workers to be from political parties

- ☐ To foster and enhance your recruitment efforts, maintain contact with your party chairs throughout the year

- ☐ When parties provide lists of potential workers, screen for those with appropriate skills

- ☐ Request that political party websites link to your election worker web page

- ☐ Provide election worker recruitment forms at party headquarters

# RECRUITING FROM POLITICAL PARTIES

## BENEFITS

→   This outreach can foster a good working relationship with political parties

→   This vein of recruitment strengthens election officials' education efforts as political parties may not understand/realize the rigorous nature of the process

→   Recruiting from political parties increases voter opinions of transparency and integrity of the process

## CHALLENGES

→   May require extra emphasis in training on non-partisan nature of polls

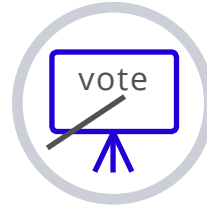→   Party members may only want to work in high-profile elections

## TIPS

•   Offer training at party headquarters and emphasize the non-partisan aspects of Election Day service

# ELECTION WORKER TRAINING

Online election worker training has been successful in many states and local offices in recent years. It can offer the benefits of flexible timing for workers and measurable results for officials. It can also educate workers on everything from machine set-up to policies and procedures to closing operations. An online option also offers self-paced training, which many workers find convenient.

Remember, however, that not all election workers learn best in a computerized setting. Election officials understand that there are a wide variety of learning methods, from reading and listening to hands on, and you'll want to incorporate all of these methods into successful training programs.

# ADAPTING YOUR TRAINING METHODS

By constantly adapting your training methods to appreciate the different methods of adult learning and stay up to date with changes in law or technology, you will achieve a more engaged, knowledgeable, and confident pool of workers serving on Election Day.

☐ Develop training to recognize different adult learning styles: *reading* (manuals, visual aids, workbooks); *listening* (lectures, interactive question-and-answer sessions, slide presentations); *watching* (typical polling place scenarios, Election Day simulation videos, or YouTube videos)

☐ Develop a training section on polling place accessibility

☐ Consider augmenting your in-person training with online training to accommodate an increasing number of tech-savvy workers

☐ Focus your training efforts on the critical subject areas

☐ Give special attention to new procedures or equipment

☐ Use plain language in training and in manuals, forms, and checklists

☐ Remember to offer hands-on training with e-poll books and voting equipment

# ADAPTING YOUR TRAINING METHODS

☐ Constantly review your training manuals, election supply lists, forms, checklists, and visual aids to ensure they are accurate and up to date

☐ Consider providing targeted training for new workers, high school and college students, troubleshooters, and polling place supervisors

☐ Develop specialized training for vote centers and early voting sites

☐ After each election, evaluate your training methods and consider what works and what doesn't

# ADAPTING YOUR TRAINING METHODS

## BENEFITS

→ Competent and self-assured election workers give voters confidence in the electoral process

→ More effort in training results in less error and confusion on the part of election workers and voters

## CHALLENGES

→ Developing effective training programs will require a commitment of time and energy

→ Deciding which important areas to cover (given time limitations and short attention spans) may present difficult choices

→ Engaging long-time workers who may be less willing to learn new processes will require extra attention during training

## TIPS

- Consistently reach out to election workers for feedback on the training

# ADAPTING YOUR TRAINING METHODS

## ADDITIONAL RESOURCES

Training Intro by Election Administrator

https://www.youtube.com/watch?v=mT0sCEBZ0To

Overall Training Review

https://www.youtube.com/watch?v=swTNVT-5SxM

https://www.youtube.com/watch?v=ejKJkudHL_k

https://www.youtube.com/watch?v=DpPHu0PXLgE

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

The revolution in available technology is not limited to just election management tools. New approaches such as online training, Web-based communication, and social media have increased the opportunities to reach all your workers with training designed to meet their individual needs.

- ☐ Make DVDs as well as online videos available on all training topics

- ☐ You can create short YouTube videos that show machine operations, necessary supplies, and Election Day opening and closing procedures

- ☐ Use YouTube videos to focus on specific Election Day activities, as this allows workers to choose the areas where they may need additional review. These videos are cost-effective and can be easily updated

- ☐ Consider creating an election library on your website and include training brochures, manuals, reports, and checklists, as well as links to your YouTube training videos

- ☐ Provide manuals that have online search capability

- ☐ Use pop quizzes in online applications to monitor effectiveness and track workers' progress

- ☐ Consider an election worker blog or newsletter

- ☐ Take advantage of other social media opportunities such as Facebook and Twitter

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## BENEFITS

→ Training with online videos and DVDs appeals to both reading and visual learners

→ Online training reaches both reading and visual learners

→ Videos, DVDs, and online training allow workers to set their own pace and revisit topics wher they feel they may need additional reinforcement

→ Online training and material on your website can be easily updated

→ You can readily monitor performance and assess areas needing additional work

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## CHALLENGES

→ Requires an initial investment of both time and money for development of online programs, videos, and DVDs

→ Not all workers will be comfortable with new technology and it does not replace in-person training

## TIPS

- Use mobile apps to inform election workers of training times and dates, and post on your website

- Provide access at polling places to computers and tablets that house critical information on Election Day scenarios and problem solving

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## ADDITIONAL RESOURCES

Training Techniques

http://goo.gl/jsXhlZ

http://goo.gl/rilXvV

http://goo.gl/vHJuFz

http://goo.gl/dwvp8A

Web-Based Training Portal

http://goo.gl/asmWH3

http://goo.gl/QW1Se2

http://goo.gl/4eaIi2

http://goo.gl/5sgOqq

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## ADDITIONAL RESOURCES

Online Training

http://goo.gl/FWD0Cz

Specialty Training

### Opening the Polls

https://www.youtube.com/watch?v=-FbHgZBXmOI

https://www.youtube.com/watch?v=HvWEpkU1mwE

https://www.youtube.com/watch?v=b5P5ShNoELU

### Processing Voters

https://www.youtube.com/watch?v=KkcT3jEsXPA

https://www.youtube.com/watch?v=uIuS8iBt2hc

### Closing the Polls

https://www.youtube.com/watch?v=YAnxyFDi2YM

http://goo.gl/18tSnH

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## ADDITIONAL RESOURCES

Setting Up Voting Equipment

https://www.youtube.com/watch?v=1tg3flMJvgo

https://www.youtube.com/watch?v=Hzkw8l4HcXU

Opening Voting Equipment

https://www.youtube.com/watch?v=AxWuNIPgGnk

Closing Voting Equipment

https://www.youtube.com/watch?v=EntssRV8gPQ

Using Electronic Poll Books

https://www.youtube.com/watch?v=GhEu4B2C-Wk

https://www.youtube.com/watch?v=xTlS8FuP_UY

https://www.youtube.com/watch?v=pjLT8Sz3KPg

Role Playing Scenarios

https://www.youtube.com/watch?v=25OpQs9iL4k

Practice Makes Perfect

http://goo.gl/jEV4PT

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## ADDITIONAL RESOURCES

Issuing Provisional Ballots

https://www.youtube.com/watch?v=dWFeOyzElAw

https://www.youtube.com/watch?v=dmKTBrORFik

https://www.youtube.com/watch?v=YKo8-39rE1k

https://www.youtube.com/watch?v=cVN0zca1jnc

Accessibility

https://www.youtube.com/watch?v=ZzGL3x1fyds

http://goo.gl/R2qcQT

http://goo.gl/ouZCNq

Language Needs

https://www.youtube.com/watch?v=MHtIgFZb0S8

https://www.youtube.com/watch?v=BXhJ61g3Isg

# TAKING ADVANTAGE OF TECHNOLOGY AND NEW TECHNIQUES

## ADDITIONAL RESOURCES

Polling Place Trouble Shooter

https://www.youtube.com/watch?v=2uM4YS2MoNc

https://www.youtube.com/watch?v=KQiBlSv2-og

Vote Centers

https://www.youtube.com/watch?v=YjnbpZUKu74

# ADJUSTING THE TRAINING BASED ON PERFORMANCE

By evaluating your training program on a regular basis and monitoring the performance of your election workers, you can determine what training is effective and where content might be improved to increase performance.

- ☐ Survey your election workers frequently to see what works and what doesn't with your training methods. Listen to what they say

- ☐ Assign a supervisor to check workers' interaction with voters and use trouble reports to monitor performance

- ☐ Monitor attendance at training sessions to get an idea of interest and commitment come Election Day

- ☐ Use pop quizzes and role-playing scenarios to find topics that may need more attention

- ☐ Collect data from previous election error reports or troubleshooter reports to evaluate your training and adjust accordingly

- ☐ Monitor problems with opening and closing the polls, provisional ballots, and end-of-day paperwork to evaluate where additional training is necessary

- ☐ Remember to exercise sensitivity in dealing with problems and offer constructive feedback, keeping criticism general rather than personal

- ☐ Determine if outsourcing some of your training is appropriate

# ADJUSTING THE TRAINING BASED ON PERFORMANCE

## BENEFITS

→ Constant evaluation of your training will determine effectiveness and create an enhanced sense of accountability and teamwork

→ Worker performance will help guide where training improvement is needed

→ Data that is generated through training evaluations will support funding requests for additional training

## CHALLENGES

→ Expect to spend time in evaluating performance reports

→ Specialized training will require additional staffing time and resources, and the development of a management database

→ Enhanced training may be necessary to address areas where workers have experienced difficulties

## TIPS

• Consider pairing experienced and new workers at both training sessions and polling places

# ADJUSTING THE TRAINING BASED ON PERFORMANCE

## ADDITIONAL RESOURCES

Improving Election Worker Performance

http://goo.gl/6FXLa7

# ACCOUNTING FOR CHANGES IN VOTING EQUIPMENT AND ELECTION LAWS

Changes in both equipment and law are the "new normal" in election administration. Adapting your training to accommodate these changes is a critical factor in the success of your elections and the confidence of your election workers, staff, and voters.

☐ Remember that changes to technology or law may affect more than one area of polling place operations

☐ Consider deadlines in your planning and remember that moving one deadline may have a domino effect and disrupt many others

☐ Test the usability of all training and polling place materials before training is scheduled

☐ Train everyone on the changes: media, staff, elected officials, candidates, election workers, and voters

☐ Evaluate the quality of your instruction and get feedback from election workers and staff

☐ Ensure that your call center support staff is knowledgeable in all aspects of any new technology or changes to law

☐ Consider using IT staff or create a specific election worker position to help with technology changes

# ACCOUNTING FOR CHANGES IN VOTING EQUIPMENT AND ELECTION LAWS

## BENEFITS

→ Election workers and staff will have more confidence in their performance knowing they have the most up-to-date information

→ A well-versed staff results in enhanced voter confidence

## CHALLENGES

→ There is always increased scrutiny from candidates and voters with any rollout of new technology

→ Training in changes to technology or law will require additional time and planning efforts

## TIPS

- Careful advance planning can minimize last minute chaos and stress

## ADDITIONAL RESOURCES

Demonstration of New Voting Machines

https://www.youtube.com/watch?v=27CDqH40jts

# MAKING USE OF MANUALS, VISUALS, AND CHECKLISTS

Creating checklists, job guides, and visual aids for election workers will ensure that important information is conveyed and available for use on Election Day.

- ☐ Review all forms, training manuals, and management checklists for changes and usability

- ☐ Develop polling place opening and closing flow charts with important one-page reminder sheets on each part of the voting process

- ☐ Put all checklists, manuals, and visuals on your website and consider DVDs for take-home study

- ☐ Diagram a layout of a "perfect polling place"

- ☐ Create checklists for special situations such as disgruntled voters, provisional voters, disabled voters, senior citizens, and bilingual voters

- ☐ Create flow charts to address a variety of scenarios and use of voting equipment

- ☐ Use poster-sized signs in a prominent location to convey critical information

- ☐ Use simple, not complex illustrations

# MAKING USE OF MANUALS, VISUALS, AND CHECKLISTS

## BENEFITS

→ Checklists or diagrams help explain and simplify

→ Having a reference helps reassure election workers and creates more confident workers

→ Visual aids can provide important reminders and reinforce critical topics

## CHALLENGES

→ Frequent document revisions may be necessary, depending on the type of election

→ You will need different documents for vote centers and early voting

→ You may have to enlist help from a designer, editor, or usability consultant

## TIPS

- Remember that diagrams, photos, and graphics help visual learners

# MAKING USE OF MANUALS, VISUALS, AND CHECKLISTS

## ADDITIONAL RESOURCES

Flow Charts

http://goo.gl/5RE2Yl

Election Worker Picture Guide

https://goo.gl/FG1egu

# IDEAS FOR DEVELOPING A TRAINING MANUAL

Taking the steps necessary to design a user-friendly training manual with clear, simple language is critical to the success of your election work force.

☐ Keep the needs of the end users in mind and consult with your election workers on content and style for the training manual

☐ Use an easy-to-read font such as Arial, Verdana, or Courier, in no smaller than 12-point size

☐ Use bullets or a numbered list rather than large blocks of text

☐ Present information in a way that makes sense, either chronologically or by specific task

☐ Use simple words and gender-neutral language in your instructions

☐ When bringing attention to a particular unwanted scenario, describe the action before describing its consequences

☐ Make information easy to find either by creating tabs or a detailed Table of Contents

☐ Note that diagrams are more effective than photographs for most processes

☐ Photographs work best to show machine details

# IDEAS FOR DEVELOPING A TRAINING MANUAL

## BENEFITS

→ An easy-to-follow training manual allows for more confident and self-assured election workers and increased voter confidence

→ Clearly written instructions will minimize critical errors during polling place operations

## CHALLENGES

→ The content will require frequent review and updating

→ Keeping the guide relevant and user-friendly may require consulting with design or writing professionals

## TIPS

- You can keep the document looking uncluttered by using large amounts of white space to balance the text

- Include your office support number at the top or bottom of each page

# IDEAS FOR DEVELOPING A TRAINING MANUAL

## ADDITIONAL RESOURCES

Developing a Training Manual

http://goo.gl/jCuu6b

http://goo.gl/fajhgz

http://goo.gl/pSVvTh

http://goo.gl/4K64zH

http://goo.gl/Hu8YXj

http://goo.gl/1Cojuv

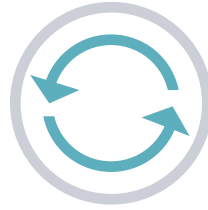http://goo.gl/GzQAOJ

http://goo.gl/BELiai

# ELECTION WORKER RETENTION

Keeping good election workers requires cultivation of a strong relationship with your work force. The efforts you make will yield benefits election after election and result in a confident and successful group of workers.

When you evaluate your workers and listen to them, you can learn valuable lessons about your recruitment and training techniques and where additional efforts are needed. Good training and ample appreciation will have your workers coming back for many elections and help your office conduct elections that convey integrity and instill confidence in your voters.

# SHOWING YOU CARE
# HELPS RETAIN WORKERS

Showing appreciation to your workers will yield a confident and successful group of workers and keep them returning to help your office conduct elections.

- ☐ Recognize the time commitment on the part of the election worker and say "thank you" at every opportunity

- ☐ Pay your workers accurately and in a timely manner

- ☐ Have special meetings with elected officials to present certificates of appreciation and honor long-serving workers

- ☐ Invite media to special recognition ceremonies to increase community awareness

- ☐ Give special recognition to deserving workers at training sessions and acknowledge excellence

- ☐ Consider awarding door prizes at training sessions to boost attendance

- ☐ If your budget permits, purchase tote bags with your jurisdiction logo, coffee cups, chair cushions, or service pins

- ☐ Provide excellent Election Day staff support to answer any questions that may come up

# SHOWING YOU CARE
# HELPS RETAIN WORKERS

## BENEFITS

→ A little appreciation goes a long way in creating a loyal and dedicated work force

→ Public ceremonies will reinforce the value of service

## CHALLENGES

→ Recognition ceremonies require staff organization time and effort

→ Additional cost is incurred for refreshments and door prizes or awards

## TIPS

- Serving beverages or snacks during training classes will increase energy and enthusiasm

# SHOWING YOU CARE
# HELPS RETAIN WORKERS

## ADDITIONAL RESOURCES

Thank You for Being An Election Worker

https://www.youtube.com/watch?v=Abu9delLCA8

# MAINTAINING A CONNECTION WITH YOUR WORKERS

When you communicate with your election workers between elections, you let them know that they are an important part of your team and that you value their service.

- ☐ Create an election worker newsletter, post it on your website, and use it to say "Thank You"

- ☐ Include information for workers on your website on upcoming elections and training dates

- ☐ Instill a sense of "Teamwork" and let workers know your success depends on them

- ☐ Hand out a printed election worker newsletter at trainings

- ☐ Use email for newsletter distribution where possible to reduce costs

- ☐ Create an election worker "Satisfaction" survey and be ready to respond to results

- ☐ Devise a list of FAQs (key dates, changes in election laws or procedures, etc.) for workers and post on your website

# MAINTAINING A CONNECTION WITH YOUR WORKERS

## BENEFITS

→ Your efforts will result in conveying value and a sense of community

→ Frequent communication between elections results in better communication on Election Day

## CHALLENGES

→ Communication efforts will require some expense as far as staff time and resources

## TIPS

- When you communicate with your election workers between elections, you let them know that they are an important part of your team and that you value their service

# MAINTAINING A CONNECTION WITH YOUR WORKERS

## ADDITIONAL RESOURCES

Election Worker Newsletter
http://goo.gl/DSfsI6

http://goo.gl/y9PRLS

http://goo.gl/EijyJQ

http://goo.gl/zizWyt

http://goo.gl/BHzsk7
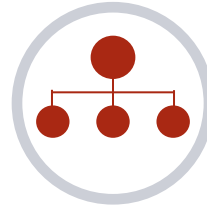
http://goo.gl/98wQqp

# MANAGEMENT TIPS

Managing recruitment, training and retention of your election work force can be one of your most time consuming tasks. Election worker management software is a welcome addition to the recent technological advances available to election administrators.

New software management systems can help with the process of recruitment, training, tracking performance and payment of your workers. These systems can also assist you in evaluating polling sites for accessibility and set up a method to contact building supervisors.

Finding an election management software system or developing your own system in-house, can result in increased efficiency and effective use of staff resources.

# USING TECHNOLOGY TO MANAGE YOUR WORK FORCE

Many election administrators have learned that new database systems can aid in streamlining the process of managing election workers. These new systems are designed to address every aspect of training, performance, and work history.

- ☐ Easily manage and track both training and polling place assignments on your database

- ☐ Monitor election worker attendance at trainings

- ☐ Maintain a history of polling place assignments and worker performance

- ☐ You can create a tracking program for bilingual workers and match them to polling places where their skills are needed

- ☐ You can also use the system to identify disabled workers who may have transportation issues or need other assistance

- ☐ Set up a system that will auto-dial, reminding workers of training classes or to give Election Day wake-up calls

- ☐ Create both email lists and drop-in templates for frequent communication or newsletters

- ☐ Develop online surveys that can be emailed to your workers and processed automatically as completed

- ☐ Set up a budget and payment system for your election workers

# USING TECHNOLOGY TO MANAGE YOUR WORK FORCE

## BENEFITS

→ Achieve greater efficiency in election worker management by automating certain tasks and processes

→ Your election workers benefit from increased monitoring and accountability

## CHALLENGES

→ Requires additional expense in purchase or development if the software is not already part of your voter file

→ Both staff and election workers will need to be trained in use of the system

## TIPS

• Designate staff as database software support